

# Old Colony Law

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## *Estate Planning Services*

### THE DOCUMENTS

Old Colony Law crafts comprehensive and personalized estate plans for clients. Our estate plans typically include, at a minimum, the foundational documents.

#### Foundational Documents:

- ✓ **Last Will and Testament** to provide for an orderly transfer of assets at death and to appoint trusted individuals to oversee estate settlement
- ✓ **Power of Attorney** to appoint trusted individuals to manage your financial and business affairs in the event of future incapacity
- ✓ **Medical Directives** to appoint trusted individuals to make medical decisions in the event of incapacity
- ✓ Legal memoranda that convey instructions and wishes for the transfer and disposition of **personal** and **digital property**

#### Additional Documents:

- ✓ **Revocable Trust Agreement** to provide for more advanced incapacity planning, avoiding probate and maintaining privacy
- ✓ **Declaration as to Remains** to convey your wishes regarding the disposition of your remains

### THE PROCESS

Estate planning with Old Colony Law is an easy four-step process.

Step 1: Initial Consultation: Please contact us at **413 387 0080** or **office@oldcolonylaw.com** to schedule an initial consultation to discuss your family, assets and wishes. There is no charge for this meeting, which typically lasts about one hour.



Step 2: Document Preparation: Within two to four weeks after your initial consultation, we mail your draft estate planning documents to you along with an explanatory letter that details the general terms of each document and describes how your estate plan works.



Step 3: Review Meeting: After you have reviewed your draft estate planning documents, we meet with you to carefully review the terms of your estate planning documents, answer any questions that you may have about your estate plan, and make any revisions that you request.



Step 4: Signing Ceremony: Shortly after our review meeting, we finalize your documents in accordance with your wishes and then meet with you to sign your estate planning documents. We then bind your original documents and mail them to you, along with a digital storage device with copies so that you additionally have your estate plan in electronic form.