
SUCCESSOR FIDUCIARY APPOINTMENT PLANNING ENGAGEMENTS
OUR PROCESS
SANTA BARBARA FIDUCIARY
01
Client submits Initial Contact Form. Available options: website, online link or hard copy.
02
Santa Barbara Fiduciary responds with quick call to Client to answer any basic questions they may have.
03
Client completes & returns Fiduciary Services Planning Agreement and meets with Lindsay.
04
Client completes & returns Successor Fiduciary Appointment Planning Engagement with retainer and provides draft estate planning documents.
05
Santa Barbara Fiduciary reviews estate planning documents, prepares memorandum and quick reference sheet, and establishes internal file.
06
Lindsay re-connects with Client for general coordination of fiduciary services, as applicable and needed.