5-Step Successor Fiduciary Appointment Planning

Santa Barbara Fiduciary

01 CONTACT US!

Let us know you're interest by contacting us by phone, email, or the web. We'll follow-up to make sure that our office is the best fit for your fiduciary needs and to schedule your Initial Consultation.

02 INITIAL CONSULTATION

During our Initial Consultation, we will get to know each other and review your current circumstances, unique needs and goals. If we're a good fit and you want to work with us, we will enter in to a formal engagement and often jump into gathering data.

03 CLIENT HOMEWORK

You'll complete a comprehensive questionnaire that ensures we capture complete and pertinent information to your individual circumstances, planning, intent, and wishes. You'll also provide us with a copy of the draft estate planning documents you intend to appoint us in.

04 WE DO THE REST

(Well, almost). We'll review your existing and/or proposed estate planning documents, asset ownership and other estate planning-related matters, facilitate follow-up communications as needed, and establish your internal file.

05 PLAN MAINTENANCE

Once the initial scope of work is completed, you agree to keep SBF and your planning up-to-date via periodic follow-ups every three to five years.