

THE INSIDE SCOOP ON CHOOSING AN ESTATE PLANNING LAWYER

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You need to do estate planning, but like visiting the dentist, it is not expected to be pleasurable. Good estate planners provide peace of mind, help achieve tax savings, and serve as trusted advisor for your family. Here is advice on selecting a skilled attorney:

Ask friends and professional advisors about their experiences. Our best referrals come from happy clients. If friends describe their lawyer as smart, trustworthy, a proactive and clear communicator, and with their best interests at heart, consider this lawyer. Financial advisors and accountants also work with estate planners. If you trust your other advisors, you can feel confident about their recommendations.

A good lawyer should be a good listener. You need to share personal information for a lawyer to give you sound advice. If a lawyer makes you feel uncomfortable or unintelligent, keep looking. You may need to interview several before you find a good fit. If you are married, both spouses should feel equally comfortable asking questions. Otherwise, when a spouse dies, an uneasy survivor may lack a trusted advisor when needed most.

Everything in estate planning can be explained in sufficiently plain language to enable you to feel good about your decisions. You may not be able to explain technical

tax details, but you should feel confident that you made a good plan and have rules to live by.

Cleveland has many competent estate planning lawyers. You want one who knows the tax rules, writes clearly, communicates plainly, and works well with your other advisors. Go with your gut to pick a good fit for your family.

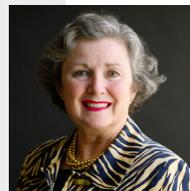
Lawyers' billing practices vary. It is fair to ask questions and understand process. But a capable lawyer may not be able to give an accurate cost estimate until they understand your circumstances and assess your needs. Estate planners often start with forms, but most thoughtful plans are customized for the client's needs. All clients have different circumstances and priorities and make different choices about their needs. Good lawyers expect and price for personal attention.

Skilled estate planning lawyers provide more than just legal advice and documents. They advise families about issues, approaches, and choices. They understand family dynamics and concerns, work well with advisors, and share experiences of how proposed designs can be effective or problematic. They help you implement the plan.

We hope these tips lead to a pleasant (or at least tolerable) estate planning experience.



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