

Allodium helps our clients to navigate the various steps of the estate planning process.

Review Estate Plan with Allodium—You and Allodium

- Allodium reviews your existing estate plan and creates a summary which will be shared with you for possible revisions. If you request changes, we will outline the revisions and return them for your review.
- We will confirm with your attorney whether additional revisions are necessary due to estate law changes.
- Once you approve the outline, we will send it to your attorney with an updated copy of your net worth statement.

Estate Planning Meeting—You and Your Attorney

- We may join the meeting by phone or in person to facilitate the conversation.
- We will take notes of the discussion and action items for your situation.

Work in Progress—Allodium and Your Attorney

- Allodium summarizes the action items following the meeting with your attorney.
- We check in periodically to ensure your attorney is working on the drafts.
- Once the drafts are received, we will evaluate them for accuracy and ensure they align with your wishes. If corrections are needed, the updated drafts will be sent to you for review.
- We are available to discuss any additional revisions you may have and will relay these to your attorney.

Estate Plan Completion—You and Your Attorney

- Review and sign the finalized estate plan. Allodium can act as a witness or notary if needed.

Post Plan Action Items—You and Allodium

- Your attorney will provide a copy of your estate plan documents to Allodium.
- We will update your beneficiaries and assist you in retitling your investment accounts according to your estate planning attorney's recommendations.

Ongoing Review—You and Allodium

- We will review your estate plan with you every few years or with any major life changes.

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Note: Allodium does not render legal advice and therefore relies on your estate planning attorney to review and comment on the legal aspects of your plan. Allodium's role is that of a facilitator.