

# VIRTUAL ESTATE PLANNING

The ease of LegalZoom, but with the thoroughness and personal service of a traditional Estate Planning law firm.

## The Taormina Firm

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### 1 **SCHEDULE YOUR APPOINTMENT**

The Taormina Firm puts you in the driver's seat by letting you Schedule an Appointment with us online at a time that works for you!

### 2 **EXPECT A PHONE CALL**

After you Schedule your Appointment, we will call you to confirm and see what you are looking to accomplish with your Estate Plan.

### 3 **DO YOUR HOMEWORK**

After our first phone conversation, we will send you some paperwork to complete prior to our Zoom appointment.

### 4 **MEET ON ZOOM**

On our Zoom call, we will once again discuss the benefits of a Will vs. a Trust, and will work as a team to plan your Estate by going through various customizable provisions together.

### 5 **AWAIT THE DRAFTS**

The Taormina Firm will draft your documents, send you a Bill for our services, and, once paid, send you your drafts to review.

### 6 **WE SHIP TO YOU (FREE!)**

Once reviewed and corrected, we send you a binder full of information so that you can make your Estate Plan work for you!

### 7 **SIGN YOUR DOCUMENTS**

With instructions from The Taormina Firm, sign and notarize your Documents appropriately on your own time.

### 8 **WE FOLLOW UP**

We're not going to let you get away with not following through with the Documents we drafted. We will follow up with you to make sure you sign them and fund your Trust/designate Beneficiaries appropriately!

### **Virtual Trust Plan**

Couples: \$1,000  
Individuals: \$750

### **Virtual Will Plan**

Couples: \$500  
Individuals: \$350

