

FAST TRACK ESTATE PLAN

At **Takacs McGinnis Elder Care Law**, we are committed to providing high quality services when you need them most. Our **Fast Track Estate Plan** equips you with custom, comprehensive estate planning documents in an expedited fashion. Under this plan, the following essential planning goals are met for clients with little turnaround time:

- ✓ Executing a Last Will and Testament to ensure my assets are distributed to the individuals of my choice and according to my terms;
- ✓ Creating a plan for preserving assets in trust for underage children or grandchildren, loved ones with special needs, or beloved pets;
- ✓ Answering the question, who will manage my legal and financial affairs and make health care decisions for me if I become ill; and,
- ✓ Providing directions to loved ones regarding healthcare preferences.

In light of Covid-19, **Fast Track Estate Planning** services are intentionally designed to be delivered without in-person interaction to protect the health and safety of all parties.

your FAST TRACK ESTATE PLAN OPTIONS INCLUDE



Bases Covered Estate Plan

- **Ideal for:** single adults, young couples with no minor children, and older couples with adult children
- **Plan includes:**
 - Last Will and Testament
 - Durable General Powers of Attorney for legal and financial decisions
 - Advance Directives for health care decision making and the *Do You Know My Wishes* workbook for end of life care planning



Solutions Driven Estate Plan

- **Ideal for:** couples with minor children, if you want your assets to go to beneficiaries in trust, or if you wish to leave assets to charities
- **Plan includes:**
 - Last Will and Testament with Testamentary Support Trusts
 - Durable General Powers of Attorney for legal and financial decisions
 - Advance Directives for health care decision making and the *Do You Know My Wishes* workbook for end of life care planning



Complete Assurance Estate Plan

- **Ideal for:** mature couples with adult children with disabilities, couples who want to protect marital assets or have health concerns, and couples who want Supplemental Needs Trust planning for their descendants
- **Plan includes:**
 - Last Will and Testament with Testamentary Support Trusts and contingent Supplemental Needs Trusts
 - Durable General Powers of Attorney for legal and financial decisions
 - Advance Directives for health care decision making and the *Do You Know My Wishes* workbook for end of life care planning

**Each package includes attorney guidance, advice, and support to develop and implement your custom estate plan.*

FAST TRACK ESTATE PLANNING PROCESS

When you select a **Fast Track Estate Plan**, rest assured we have your needs covered from beginning to end. Here is what this expedited process will look like from start to finish.

- 1 Schedule a Consult with One of Our Qualified Attorneys.** Talk with one of our Intake Specialists who will assist you with scheduling your appointment and send you the needed forms to guide the consult process.
- 2 Consult with Attorney.** Discuss your planning goals and outline your wishes during a meeting with an attorney using video or teleconference technology. The consultation meeting will include an hour to strategize and formulate a plan. If services are retained, your attorney will schedule a second meeting to review your documents with you and, a third meeting for the actual signing of your documents.
- 3 Draft Review Meeting.** Review your documents and discuss your questions with an attorney using video or teleconference technology. The attorney will confirm your signing appointment and review the signing process with you.
- 4 Signing.** Travel to the office of Takacs McGinnis Elder Care Law, and an attorney and select group of staff members will facilitate the signing of your documents while you remain in the comfort of your vehicle (*curbside signing*). We also have virtual capabilities (mobile notary).
- 5 Receipt of Final Documents.** You may choose to receive your final documents either the same day or next day. All original estate planning documents are delivered in a professional binder.

CURBSIDE SIGNING or MOBILE NOTARY

We have designed “**Curbside Signing**” and “**Mobile Notary**” to be as easy as curbside pickup from your favorite restaurant while eliminating physical contact and shared spaces.

How does it work?

- Clients will be directed to a **designated parking space** in the parking lot. Clients will **remain in their vehicles** with windows up.
- An attorney, while standing **outside your vehicle**, will communicate with you by telephone during the appointment and guide you through the process.
- **Staff members** will accompany the attorney outside your vehicle during the appointment to meet legal requirements when executing estate planning documents. The **signing attorney** will instruct you on what documents you are signing and how to sign each document.
- Once all documents are signed and witnessed, we will prepare and provide you with your final documents.

In order to serve you quickly, it is our highest aim that this process from retention to final documents will not exceed 10 business days. [Call us today to get started.](#)