

Client Roadmap

Your Simple Path to Estate Planning Success



01

VISION: 60 min

Free consultation to identify & explain goals, understand options.

02

DESIGN: 60 min

Deep dive with attorney to craft your unique plan.

03

SIGNING: 15 min

Final signing with attorney, witnesses, notary depending.

Yes, it's that simple.

Annual legal reviews* are advisable as assets, goals, and laws change.

**Included for all JLP Legacy Members*



START YOUR JOURNEY TODAY!

No more putting it off. Scan the QR code and schedule your free consultation now.

EXPERIENCE THE DIFFERENCE.

UNDERSTANDING OUR WHITE-GLOVES CONCIERGE SERVICE APPROACH

Clients want the best possible outcome for heirs, cherished loved ones, and important causes. For this reason, our firm refuses to practice "one-and-done" estate planning. Instead, we place an entire legal service team at your disposal, for life. Cheers!



CLIENT TESTIMONIAL

We are so pleased. JLP answers every question and goes out of their way to make you feel comfortable and knowledgeable as to what estate planning entails. Highly recommend trusting your estate planning to Joseph. When our time comes we know that everything will run smoothly AND according to our wishes. Thank you!

NANCY B.
South Bend, IN

LET US AMAZE YOU.
SCHEDULE TODAY.



JOSEPH

LEGACY PLANNING



CONSTANT SUPPORT

Estate planning with JLP makes you a Legacy Member of our firm.

That means comprehensive, continuous legal support for you and appointed decision-makers.



LEGAL REVIEW

Members are informed of relevant tax advantages and changes in law, with regular document review to keep your plan current as life changes.



NO HIDDEN FEES

No hourly billing, no surprise fees, no fearing the price of an attorney phone call. Member service packages are clear and inclusive, with simple pricing that we discuss up front.