

# 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.

*\*Free for Legacy Track Members*



**START YOUR JOURNEY TODAY!**

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