METLIFE & ARAG 30-DAY PLANNING PROCESS

Step One: Getting Started

Provide MetLife Eligibility ID or ARAG Case Number(s)/ Membership Numbers

You will be assigned a Paralegal who will:

- Verify and review your coverage
- Answer questions
- Send a welcome email with detailed information

Step Two: Input Choices

Review welcome email and find attached Estate Planning Organizer

Return completed Organizer to your Paralegal. Contact our office with any questions

Step Three: Preparation of Draft Documents

Staff will request missing info. or clarifications

Attorney will begin working on drafts to be emailed

Full Coverage includes:

- Revocable Living Trust ("RLT") Agreement
- Certification of Trust
- Declaration of Trust
- Durable Power of Attorney
- Advance Health Care Directive
- Authorization and Waiver for Inspection ("HIPAA")
- Assignment of Personal Property to RLT
- Instructions for the Distribution of Personal property
- Final Disposition Instructions
- Last Will and Testament (Pour-Over to RLT)
- Grant Deed for Residence
- Preliminary Change of Ownership Report ("PCOR")
- Asset Transfer Instructions

Step Four: Document Review

Please review documents immediately and email any corrections and/or questions

The first set of corrections are included at no charge with your coverage

Second drafts will be sent for review if needed

Step Five: Signing and Notarization

Call to arrange an appointment to review, correct and sign forms

- All signers must be present
- Must have valid photo ID for the Notary

Once signed, original documents will be scanned and placed in a binder for Client's safe-keeping

Step Six: Additional Services Available

Preparation of Deeds for Additional Properties (Rental or Business), Assignments to LLC's and Partnerships, Prenuptial Agreements, VA and Medi-Cal Benefits, Tax Planning, etc.

Once signed, your documents can be amended in the future and may be included in your coverage

Ver.9.21.2023