

PENNA & ASSOCIATES

LLC

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Hello!

Thank you so much for considering Penna & Associates, LLC to assist with your estate planning needs. Estate planning can be a stressful process, but we strive to ensure our clients' goals are met by implementing a solid estate plan.

In this welcome packet you will find a roadmap to our firm's estate planning process along with materials to assist in clearing up common questions we receive. Please do not hesitate to reach out to me at anytime if you have any questions.

If you're ready to start the process, please fill out our intake form [here](#).

Again, thank you so much for your time and consideration. We look forward to working with you on your estate plan!

Very truly yours,



Erica L. Penna, Esq.
OWNER/PRINCIPAL ATTORNEY

Estate Planning Roadmap



1

Initial Intake

You will receive our client intake form via DecisionVault. If you prefer a printable intake form, we would be happy to provide a PDF.

2

Initial Interview/Design Meeting

During this meeting we will review your intake form, clarify any questions, and design your estate plan with you. This meeting can be done by phone or Zoom.

3

Drafting

Once we have designed your estate plan with you, our attorney will carefully draft your estate planning documents.

4

Review

Once a draft of your estate plan is completed, we will review the plan with you, answer questions, and make revisions. This meeting can be done by phone or Zoom.

5

Signing and Delivery

Once a final version of your estate planning documents is completed, we will set up a meeting for you to sign the documents.

6

Maintaining the Plan

Once your estate plan is completed, it is important to periodically review your documents to ensure the plan still meet your goals.

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WILL-BASED
ESTATE PLAN

VS

TRUST-BASED
ESTATE PLAN

Must be proved in
probate court

No probate
necessary if
properly funded



Public record

Confidential



Most expense
incurred pre-death

Most expense
incurred post-death



Goes into effect when
you die

Goes into effect
immediately

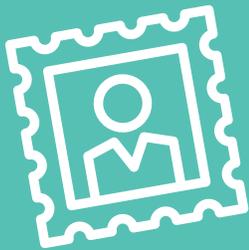


WHY WOULD I EVEN NEED AN ESATE PLAN... OR AN ESTATE PLANNING ATTORNEY?



WHO IS GOING TO FEED FIDO?

It's important not to think about estate planning as something you do for yourself (or something that can be overlooked). One of the best ways you can show appreciation for your loved ones is to make sure they're cared for—and that applies to the humans and animals in your life.



WHO GETS YOUR STAMP COLLECTION?

Make sure your valuables, mementos, and family heirlooms are handed down to the right person (or organization) who will really appreciate them. Failing to memorialize your wishes in a comprehensive estate plan with a will and/or trust results in intestate succession—the state's best guess at what you would have wanted to be done with your things.



DO YOU REALLY WANT A ONE-SIZE-FITS-ALL WILL?

You're a unique individual with your own wishes, hopes, and dreams. Should a will that works for a single, 20-something be the same one used for a well-invested grandparent of 12? You've worked hard to create the life you have—make sure you trust your planning to an experienced estate planning attorney and not a fill-in-the-blank, cookie-cutter document generator (you know you've heard of them) with a final product resembling a Mad Lib game.



"STAIRWAY TO HEAVEN" OR "AVE MARIA"?

A comprehensive estate plan can contain your wishes with as much detail as you want, including instructions for your funeral or memorial service. Make sure your family has a chance to remember and celebrate your life instead of placing the burden of arranging final plans—like what song will be playing at your funeral—on your already grieving loved ones.



WILL HE SPEND IT ALL ON LEGOS AND ICE CREAM?

Sometimes the most loving thing you can do is protect children and other loved ones from themselves. You might want to make sure that your children are financially secure during their lifetime or that your nephew's education is paid for. Whatever your goals are, a proper estate plan can put provisions in place to make sure your loved ones are provided for, rather than having their inheritance squandered on a Ferrari, seized by a creditor, or given to an ex-spouse during a divorce.

ESTATE PLANNING

FEE SCHEDULE

WILL PACKAGE

Single Person: \$995
Married Couple: \$1195

- Last Will & Testament
- Power of Attorney
- Health Care Directive

SIMPLE TRUST PACKAGE

\$2295-\$3495*

- Living Trust
- Pour-Over Will
- Power of Attorney
- Health Care Directive
- Transfer Deed and Recording Fee (x1)

*For clients with non-taxable estates.

MAINTENANCE PACKAGES

Will Plan: \$195/year
Trust Plan: \$395/year

- Provide annual review of documents
- Free "word processing" amendments
- Discounted fees for complex changes
- Discounted real estate closing fees
- And more!