



**JILL GREGORY | YOUR
ATTORNEY FOR LIFE**

WELCOME PACKET

www.jillgregorylaw.com

ESTATE PLANNING

Peace of mind knowing that
you, your children, your loved ones, & your legacy
will be taken care of in the best way possible.

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Congratulations on taking the first step towards the protection of your family and your wealth. You've made a great decision - one your family will appreciate for years to come.

During your Estate Planning Session, we will discuss your desires, goals and concerns for your family and your wealth. We will discuss updates and revisions to any existing estate plan, tax avoidance strategies, guardianship planning for any minor children, your medical and health related goals and decisions, and various estate planning options and their fees and costs.

Please complete the Estate Planning Worksheet in as much detail as possible. To get the most out of our meeting, please return this Worksheet to us prior to your appointment. You can send the completed worksheet to us via email to support@jillgregorylaw.com or via fax to (949) 396-2134.

If you have any questions or need any help completing your Estate Planning Worksheet, please contact us. We are here to help you and we welcome your questions.

We look forward to serving you and your family!

Warmly,

Jill Gregory

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OUR PROCESS

Estate planning can be a big step so I have designed our planning process to be as comfortable and streamlined as possible.

The planning process begins with an initial meeting, known as the **Estate Planning Session**. This is an opportunity for you to meet with Jill Gregory, Attorney & Counselor at Law, one-on-one.

During this initial meeting, Jill will walk you through exactly what your loved ones would have to do and where your assets would go if something happened to you.

You will then be able to determine if there was anything about your current plan (or the state's plan for you) that you wouldn't like and you'll **get clear on what you would want to happen if something happened to you**.

THE DESIGN STAGE

Assuming there is a good fit between you and the firm, Jill will help you to choose the planning level and fee that is right for your family (we have several different planning levels to accommodate your needs – our fees begin at \$2,000 and they are all-inclusive, so there are no surprises), and you and Jill will then design a plan that will give you the peace of mind of knowing your family will be taken care of in the event the unthinkable happens.

Sometimes, depending on the level of planning you choose and the complexity of your situation, a second design meeting is needed to review your more complex financial matters and assets.

Once we have completed the design of your plan, Jill personally drafts your individual estate plan. In most law firms, the drafting is handled by new associates, or even out-sourced to a non-lawyer company. But here at the Law Offices of Jill Gregory, your estate plan will be given the personalized attention it deserves.

THE SIGNING SESSION

About 4 weeks later, once your plan has been designed, you will then sign your planning documents before a notary. At this point, your family and your assets will be protected in the case of your death or incapacity.

In most law firms, this is where the attorney-client relationship ends. Our mission is to be your attorney for life, so we do things drastically different.

Following the signing of your plan, we review your assets with you to ensure that all your assets will be owned in the right way.

During this meeting we offer a legacy interview where we record a personal message from you to your family, your children's guardians, your health care agent, ...

After you sign your estate planning documents, we don't just send you on your way and wish you luck for the future. Instead, we create an electronic record of all of your legal documents so you can easily access them anytime you need to in the future, we schedule a Funding Review Appointment to review the transfer of assets with you and answer any questions you might have; and we send letters to your agents so they will know what to do in an emergency.

ESTATE PLAN REVIEW

Then, we still aren't done! We meet with you at least every three years to review your plan and make sure it stays up to date. If that's not included in the planning you are doing, the set of documents you get are very unlikely to work when your family needs them. And, if you participate in one of our annual programs, you will have an opportunity to review your plan on an annual basis, and we will provide your family with a number of other valuable services.

Finally, we are always here for you and we don't charge you for phone calls, faxes, or emails. We love hearing from you!

TESTIMONIALS

Following the birth of our first daughter we asked Ms. Gregory to help us with our wills and trusts. She was helpful, knowledgeable and provided such insightful guidance, we subsequently utilized her services to incorporate our businesses. She is personable, well-informed, experienced, and offers clients the ability to handle a variety of different legal services. Jill makes confusing legal matters manageable and easy to handle and we will continue to look to her to assist us with our needs in the future. – Katja Dahl

I was so overwhelmed just thinking about doing our trust. Jill is so confident, kind and easy to talk to that the experience was easy and painless. We are so happy that we hired her to take care of our family! - Jessica

Caring, loving lawyer who takes great care of your family. For life. - Alexis Neely

In setting up a living trust, I wanted to make sure that if anything happened to me or my husband, our kids would be covered. Dealing with family matters can be difficult, uncomfortable and emotional. Jill is kind and very professional, making the whole process smooth. We never felt rushed in making our decisions. When we need to make changes, I know Jill will be there. – Gina

Until I met Jill Gregory, everything I knew about lawyers came from jokes. People who make those jokes clearly haven't met Jill Gregory. I couldn't imagine my team without her. She communicates her expertise in layman's terms, ensuring that I can follow along and then make the informed choice that is right for me. She is insightful and personable, taking an intimidating topic and making it accessible. She is invested in my success . . . offering thoughtful suggestions that resonate with what I'm striving to achieve ... I'd recommend her in a heartbeat.
– Heather Mack





Hi, I am Jill Gregory, Attorney & Counselor at Law, and the founder of Jill Gregory PC, a preeminent, concierge boutique estate and business planning law firm. With over 20 years of experience in estate planning, trusts, probate, trust administration, asset protection planning as well as business planning, you know you will be in good hands with our firm.

The “Official” Bio

Jill Gregory began working in her own family’s business at a young age and is very familiar with the needs of families and small business owners, not just from a legal standpoint, but from a personal standpoint as well.

Jill focuses on highly personalized estate planning, probate and trust administration for individuals, families and small businesses. She’s been doing this work since 1996.

Jill began her practice with the estate planning department of a downtown San Francisco law firm and later with a boutique estate planning law firm in the Bay Area, working with one of the most innovative estate planners at that time. In that role, she worked closely with and created estate and business plans for affluent clients, including Napa Valley winery owners and Fortune 500 CEOs, officers and their families.

Jill later opened her own practice in 2001 and founded Jill Gregory PC, a California Professional Corporation.

In addition to meeting with clients in the Newport Beach and in Tahoe City offices, Jill is available to meet with clients in offices in Beverly Hills, La Jolla, Malibu, Sacramento, and Walnut Creek, as well as at their homes and offices.

Jill currently serves clients in Orange County, Los Angeles, San Diego, La Jolla, El Dorado Hills, Sacramento, San Francisco – Bay Area, Marin County, Tahoe City and Truckee, as well as working with clients virtually throughout California (and around the globe with California based assets).

Jill advises and counsels clients regarding wills, revocable living trusts, durable power of attorney, guardianship nominations, California Advance Health Care Directives, family business entity planning, planning for non-citizen spouses, irrevocable trusts (including life insurance trusts, IRA trusts, and special needs trusts), probate, trust administration, asset protection planning as well as entity formation, LLC's, S-Corps, business succession planning, intellectual property, copyrights, trademarks and business tax strategies. Jill's experience includes in-house business and tax planning for a nationwide real estate investment group. She has particular expertise in planning for families with minor children and has a young child herself.

Jill was selected to serve as a California Superior Court pro-tem Judge.

Jill Gregory is licensed to practice law in the state of California. She graduated from Pepperdine University and Pepperdine University School of Law.

The 3 Most Common Reasons People Avoid Estate Planning

1. You Think You Already Have an Estate Plan in Place

If you already have a Will, Trust, Health Care Directives and/or a Power of Attorney in place, you may think you don't need to come in and meet with me about your family's legal planning.

Here's why you would want to come in anyway.

The reality is that estate planning documents by themselves are meaningless to your family if they are not kept up to date throughout your lifetime and if your assets are not owned in the right way to keep your family out of probate court.

If there have been any changes in your life, the law or your assets since you put in place those documents and the documents have not been updated, come on in to see me so we can make sure they still meet your family's needs.

Plus, if you have minor children at home, there is a very good chance that the documents were not prepared properly in the first place. Most lawyers do not have the knowledge, training or experience to plan properly for the care of minor children. This is a risk you don't want to take!

Not to worry though ... we'll take care of all of that when you come in.

2. You Think You Don't Have Enough Assets

You may be thinking you do not need an estate plan because you don't have an estate. I hear this all of the time.

And you might be right. If you do not own your home, do not have life insurance, and do not have any assets in the bank or in brokerage accounts, you still have an estate, BUT you may not need a comprehensive plan to handle things at the end of your life.

But there are a couple of things you still will need to have in place, even if you don't have many assets.

First of all, if you have dependent children at home, you will need to make sure you have a plan in place that addresses their care if anything happens to you.

This plan needs to take into account not just who would raise them in the event of your death, but also who would take care of them in the short term if there was an accident, and how you would want them raised by the people you've chosen as guardians. Don't worry if that sounds like a lot, we'll make sure you've got it all taken care of when you come in for your planning session.

If you do not have dependent children at home, even if you do not have assets you will need to have legal documents in place to ensure that health care decisions and financial decisions can be made for you in the way you want in the event of an accident.

And it is possible you could get those essential documents in place without a complex estate plan.

It's a common misconception that if you own a home but have a very high mortgage (and very little equity), you don't have a large estate. In California the cost of probate is not based on the equity of your home, but on the fair market value. And, the cost of probate is usually about 4% - 6% of that value. So, if you own a home worth \$500,000, the cost of probating that one asset could be \$25,000 (even if you have little or no equity in the house)!

The Estate Planning Session you have scheduled with us is designed to take an honest look at what you really do need and what you really do not need. If it turns out you don't need any planning at all, you leave the session educated, informed and feeling great that you have done the right thing by your family by investigating what's necessary to make things as easy as possible for them at the end of your life.

If it turns out you do need planning, we will work together to determine the right planning for you and your family based on your needs, your budget, and your stage of life. And most importantly, we will make sure that whatever gets put in place will stay up to date and continue to work throughout your lifetime.

3. You Think You Can't Afford to Plan

The last reason is that you may think you cannot afford to plan.

That may or may not be true. But you don't have to worry about that yet because when we meet we are first going to look at whether you need to plan. If it turns out you do need to plan, we will work together to make it affordable for you and your family.

If you do not need to plan, you leave the meeting feeling great about having done everything you can to make sure things will be as easy as possible for your loved ones if and when something happens to you.

So, rest easy, don't worry about a thing. I am here to make this whole process of thinking about difficult subjects easier for you and your family.