**Menu Of Services Provided By Our Firm
And How We Implement Them [EXAMPLE]**

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| **Service** | **What** | **How** |
| **EstatePlanning** | Review of Wills and trusts, flowchart of client’s estate plan, and referrals to attorneys when needed | Our estate planning process consists of two to three meetings. In those meetings, we will go over in depth your financial history, goals, motivations, and values, walk you through your existing estate planning documents to show how they’re aligned to your goals (or not!), if necessary, recommend an estate planning attorney who can come into the third meeting with us to discuss potential changes and updates to your estate documents. If the client likes, we can also record oral histories or messages to family members, a complimentary service we provide in partnership with [Everpresent](https://everpresent.love/), conveniently recorded directly in our office. |
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