

7740 SW 104th Street 305.666.6111

Suite 101 email: steven@stevensilverman.com

Miami, Florida 33156 www.stevensilverman.com

Hi, this is Steven Silverman, your Miami Estate Planning Attorney. I wanted to give you an introduction to our firm and how we handle your estate planning. First, I want to thank you for providing us an opportunity to earn your trust by preparing your family’s estate plan. I take this responsibility very seriously and look forward to working with you.

Our office is located in Pinecrest which is in the Southern part of Miami-Dade County, about a mile south of the Dadeland Mall. The street address is 7740 SW 104th Street, Suite 101.

With this email, we have also provided you two questionnaires, once with basic contact information and finances and one on issues and needs. I have included a description of the three levels of estate planning we usually provide to our clients. Most of our clients choose one of these three plans. All of our services are charged on a flat fee basis, not by the hour.

I am the person who you will be dealing with primarily. Prior to our meeting, you will go over and answer the questionnaires that we have provided to you. You can enter the answers into the form and then save it. You then email it back to our office. You can also print it for your own use. Once you have returned the questionnaires, we will send you an email with a link to my calendar. You will be able to select a date and time that is convenient with your schedule. You have the choice of a zoom video or a telephone call. The initial meeting is usually an hour. If you are married, please be sure that both spouses are available to attend this appointment.

It is very important that you do your best to go thru the questionnaires and answer as much as you can. There are many pages that have questions to cause you to think about potential issues that might occur or maybe concerns of yours. Your answers will allow us to customize your estate plan to deal with those. Also, think about your estate planning goals, what assets you currently have, and to whom you would like to leave your assets. We ask you to provide us ballpark figures on your finances at this time. Please list as many of your assets as possible and particularly if the asset is a retirement account.

Before our meeting, start thinking about who you wish to act as:

* Personal representative of your will,
* Trustee(s) of your Trust
* Medical decision maker,
* Financial power of attorney, and
* If you have minor children, a Guardian and Trustee.

Please have additional people to act as a successor if your first choice is unable or unwilling to assume this responsibility. Our Website has many articles that answer Frequently Asked Questions about these and other topics. Please feel free to go to StevenSilverman.com and look around.

I look forward to working with you and your family to take care of your estate planning goals.

 Regards, Steven