

INITIAL CONSULTATION PACKET



*ESTATE PLANNING SOLUTIONS
FROM
The Law Offices of James Hyatt & Associates*

13220 Executive Park Terrace
Germantown, Maryland 20874

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ABOUT OUR SERVICES

OUR SERVICES: *The Law Offices of James A. Hyatt & Associates is dedicated to providing innovative and personalized estate planning counseling to clients who are looking protect what they value most - their family and their assets. We believe that Estate Planning doesn't have to be an unpleasant experience. Indeed, what greater satisfaction can there be than knowing that you have taken steps to protect your loved ones from unnecessary difficulties, including taxes, administrative expenses such as probate costs, delays and aggravation? We have many tools and strategies to help our clients accomplish their goals.*

OUR CLIENTS: *We work with clients who are motivated by a desire to develop an estate plan that helps them achieve their goals and dreams for themselves and their families. Our clients don't shop around for the simplest, cheapest, "cookie cutter" will, power of attorney or other documents. Rather, they are looking for experienced, caring counselors who will help them create comprehensive estate plans that will provide the very best results for them and their families..*

OUR HALLMARK (WHAT MAKES US DIFFERENT):

1. *Our practice is limited to estate planning. This allows us to devote considerable time keeping current in our field, and developing new and innovative approaches, which can benefit our clients. Our techniques are **constantly evolving and improving** as we seek to add value to the services we provide to our clients.*
2. *We take the time to educate our clients, so that they **fully understand their estate planning options.***
3. *We engage in an extensive **pro-active counseling process**, which helps our clients identify their goals and objectives, and consider things that they might not have thought about before.*
4. *We are dedicated to preparing **estate plans that work.** This means that we work with our clients to help complete any re-titling of assets and beneficiary designation changes that may be necessary to ensure that the plan will function the way it is designed.*
5. *Everything we do is designed to create a **long-term relationship** with our clients and their families, so that they will keep their plans current with changes in the law, changes in their circumstances and changes in their families, and that they will benefit as we improve our knowledge and abilities.*

6. *We strongly believe in the **team approach to estate planning**, and we strive to involve the client's trusted advisors in the estate planning process. We have found that the very best estate plans are those that result from the collaboration of the client's accountant, financial advisor and estate planning attorney, so we will bring that advisor into the planning process where appropriate.*

ABOUT OUR COMPLIMENTARY CONSULTATION

Estate planning is a very personal matter. It is all about taking steps to protect those people and things that are near and dear to you: your children, grandchildren, parents, siblings and others you love; and your homes, heirlooms, family businesses, retirement and other assets you have built and acquired during your lifetime. It is a process in which requires that you genuinely trust and like the people who are helping and advising you.

Our initial consultation is designed to give you the opportunity to find out about our firm and our approach to estate planning, and to help you decide if our services fit your needs and objectives. It is also designed to give you all of the information you need in order to determine what planning is right for you and your family.

In order to make the best use of your time and ours, and to enable us to be prepared for the meeting, we ask that you provide us with information about you, your family, and your assets, as well as your general goals and objectives. This information is provided to us on our Estate Planning Information Form and Goals and Objectives Checklist. We ask that you provide us with this information at least two days prior to our meeting. If we do not receive the information in advance, we will call you and reschedule the meeting so as to allow sufficient time to gather and review the necessary information.

Most Initial Consultations take approximately 1 to 1-1/2 hours, although we will always allow enough time to answer any of your questions. Usually, at the conclusion of the Initial Consultation, we will give you a recommended course of action, or a number of alternatives, and give you a specific fee quote. Then, it is up to you to decide whether you want to proceed with the planning or not. Whatever your decision, there is no obligation, and no fee for the Initial Consultation.

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DIRECTIONS TO OUR OFFICE

FROM THE SOUTH:

13220 Executive Park Terrace is in the Churchill Executive Park

I-270 North to Exit 16 (Father Hurley Blvd.); stay left on exit ramp to Germantown (16B)

Turn left at light on off ramp onto Father Hurley Blvd.

Go 1.5 miles to the Stop Sign at Wisteria Drive.

Turn left on Wisteria Drive; then first (immediate) left into parking lot (Executive Park Circle)

Take second right onto Executive Park Terrace

We are the third building on the right.

FROM THE NORTH:

I-270 South to Exit 16 (Father Hurley Blvd.); stay to right on ramp to Germantown (and Father Hurley Blvd.)

Go 1.5 miles to the Stop Sign at Wisteria Drive.

Turn left on Wisteria Drive; then first (immediate) left into parking lot (Executive Park Circle)

Take second right onto Executive Park Terrace

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