

Our Protocols for Our First Meeting

No Obligation for Initial Meeting

At WISEMAN BRAY PLLC, it is our policy to meet with a prospective client (or if married, both spouses) with no obligation on your part to retain our firm for legal services. If we are not retained, you will not be billed for the consultation. Let us know if extenuating circumstances prevent your spouse from attending. Exceptions can be made.

Our Investment in You

We are willing to set aside time for you so that we may confidentially discuss your unique circumstances to determine if we can help you. This is our investment in you. We make this investment so that we can meet with you to discuss how we can assist you in obtaining your estate planning goals and objectives.

In Return

In return, we expect that you will come to the meeting prepared, and if you are married, that both spouses will attend the meeting. We cannot express enough how vital it is that you take the time to complete the enclosed Confidential Personal Information Questionnaire. In order to utilize our resources most efficiently, we request that you return your completed questionnaire prior to our meeting.

Make the Investment

Most people will spend more time planning their next vacation than they will spend planning how to pass all their assets and values to their heirs. Please invest the time to complete the Confidential Personal Information Questionnaire. Make the investment for yourself and your loved ones.

What to Bring With You to Our First Meeting

1. Copies of all Warranty Deeds and Quit Claim Deeds for real estate owned by you
2. Copies of all Prenuptial Agreements, Divorce Decrees or Court Orders obligating you to pay alimony or child support
3. Copies of existing estate planning documents, such as Wills, Powers of Attorney, Trusts and Living Wills

We look forward to working with you in an effort to help you achieve your goals and estate planning objectives, and to eliminate any concerns you may have about the estate planning process.