

OUR PROCESS: FLOW CHART

HEAD AND HEART ESTATE PLANNING



Once you become a client of Head and Heart Estate Planning, we help you move through the Estate Planning process in a way that requires balancing:

- **efficiently** so that you can get the right Estate Plan in place and remove the risks of it not being done; and
- **thoughtfulness** so that the right strategies (legal and non-legal, head and heart) are put in place for your circumstances and loved ones.

The below flowchart sets out how we like to work with clients to achieve this balance.

1. You reach out

THANK YOU! MAYBE YOU HAVE HAD A 15 MINUTE [CHAT](#) WITH US; COMPLETED OUR QUOTE QUIZ; OR CONTACTED US VIA DM ON [INSTA](#) OR A PM ON [FACEBOOK](#).

2. Receive our Costs Agreement

IF YOU'RE HAPPY: SIGN IT, SEND IT BACK, AND MOVE ONTO STEP 3

IF YOU'RE SITUATION IS A LITTLE MORE COMPLEX, [BOOK A 15 MINUTE CALL](#) TO DISCUSS IT, OR EMAIL US LUCY.PERCY@PERCYLEGAL.COM.AU

3. Book our First Meeting

VIA VIDEO CONFERENCING: FROM THE COMFORT OF YOUR HOME, OR THE CONVENIENCE OF YOUR WORK, AND AT A FLEXIBLE RANGE OF TIMES.

USE [THIS LINK TO BOOK](#) NOW.

4. Complete a Client Questionnaire

HIGH VALUE EXCHANGE: KNOWING ABOUT YOUR FAMILY, ASSETS & RISKS AHEAD OF OUR MEETING MEANS THAT INSTEAD OF BEING AN INFORMATION COLLECTION MEETING, IT BECOMES A HIGH VALUE EXCHANGE BETWEEN YOU AND US ABOUT RELEVANT STRATEGIES FOR YOU TO LEARN ABOUT AND CONSIDER.

USE [THIS LINK TO GET STARTED](#) NOW.



Our Process and working with us

5. First Meeting is held

INPUT = OUTPUT: PUT THE KETTLE ON / GRAB A COFFEE / POUR A WINE.

THIS IS YOUR CHANCE TO LEAVE A MEANINGFUL IMPACT FOR THOSE YOU LOVE AND NOT JUST A SET OF LEGAL DOCUMENTS. BUT THE OUTPUT OF DOCUMENTS WILL ONLY BE AS GOOD AS THE INPUT OF INFORMATION YOU GIVE US IN THIS MEETING. SO LET'S NOT RACE THROUGH OUR TIME TOGETHER, WE SUGGEST YOU ALLOW 60-90 MINUTES. NO NEED TO TAKE NOTES, WE WILL SEND YOU EVERYTHING YOU NEED AFTER THE MEETING.

6. Draft documents

MY QUIET TIME: WE WILL SEND YOU DRAFT DOCUMENTS, USUALLY WITHIN A WEEK OF OUR MEETING. YOU'LL ALSO RECEIVE A LETTER EXPLAINING WHAT HAS AND HASN'T BEEN INCLUDED, AND ANY OUTSTANDING INFORMATION YOU NEED TO PROVIDE TO US TO COMPLETE THEM.

WE CORRESPOND VIA EMAIL TO COMPLETE THESE DOCUMENTS, UNTIL YOU ARE HAPPY THAT THE PARTICULARS ARE CORRECT AND THEY COMPLY WITH YOUR WISHES.

IF YOU ARE ELECTING TO ALSO LEAVE A LETTER OF WISHES, YOU SHOULD WORK ON THIS NOW TO DISCUSS IT AT OUR NEXT MEETING.

7. Book our Second Meeting

IN PERSON: IF YOU ARE LOCAL TO MELBOURNE, THIS MEETING WILL BE IN PERSON. [USE THIS LINK TO BOOK](#) THIS MEETING AT OUR LOCATION, OR IF WE ARE MEETING AT YOUR HOME, WE WILL ARRANGE THIS BY EMAIL.

VIA VIDEO: IF YOU AREN'T LOCAL, WE WILL BE POSTING THE DOCUMENTS TO YOU FOR YOU TO ARRANGE LOCAL WITNESSES.

OUR SECOND MEETING WILL THEREFORE BE A READ THROUGH OF THE DOCUMENTS VIA VIDEO SO THAT WE CAN RECORD THAT YOU KNEW AND UNDERSTOOD HOW THEY OPERATED, AND WHAT WAS INCLUDED. [USE THIS LINK TO BOOK](#) THIS MEETING NOW.



Our Process and working with us

8. You sign your documents

WITH US WITNESSING: WE'RE ALWAYS PLEASED TO MEET OUR CLIENTS IN PERSON, AND WILL TAKE CARE OF ALL OF THE COMPLIANCE REQUIREMENTS ON THE DAY.

SOMEONE ELSE WITNESSING: WE SEND YOU A LIST OF WHO CAN BE A WITNESS, AND HOW TO MAKE SURE THAT THE DOCUMENTS ARE SIGNED SO THAT THEY COMPLY WITH THE LAWS OF YOUR STATE. WE WILL CHECK THAT THEY ARE COMPLETED CORRECTLY WHEN YOU RETURN THEM TO US.

9. Your Attorneys accept their roles

STATEMENT OF ACCEPTANCE: ANYONE THAT YOU APPOINT AS AN ATTORNEY MUST ACCEPT THEIR APPOINTMENT IN WRITING, AND IN THE RIGHT FORMAT TO COMPLY WITH THE LAWS OF YOUR STATE.

WE WILL EMAIL EACH OF YOUR ATTORNEYS FOR YOU, WITH AN EXPLANATION OF THE ROLE THAT YOU HAVE APPOINTED THEM TO, THE DOCUMENTS THAT THEY NEED TO SIGN, AND THE INSTRUCTIONS TO HAVE THEM WITNESSED CORRECTLY.

10. Safe storage

DEEDING AND SAFE KEEPING: ONCE YOUR ATTORNEYS RETURN THEIR DOCUMENTS WE BIND, AND REGISTER THE ORIGINAL DOCUMENTS IN OUR DEED REGISTER, AND THEN STORE THEM IN OUR SAFE (OR RETURN THE ORIGINALS TO YOU ON YOUR REQUEST).

A BOUND COPY OF THESE IS SENT TO YOU WITH INFORMATION ABOUT WHAT EVENTS WOULD TRIGGER THE NEED TO UPDATE THEM.

Congratulations,
your Estate Planning is finished!