THE PERFECT RIA

ATTORNEY INTERVIEW QUESTIONS

1. What areas of law do you consider to be your specialty? Are there other areas where you also feel comfortable practicing?
2. Please walk me through your process for estate planning clients.
    a. Intake Questionnaire
    b. Initial Meeting
    c. Document Signing
    d. Follow Up
3. In general, when do you recommend using a living trust vs. a traditional will? What are your thoughts on making POA's effective immediately vs. upon disability? Should family member trustees be required to post a bond?
4. Do you recommend professional trustee services?
5. In general how do you charge for estate planning work? What is your fee schedule? In an average year, how many estate plans do you create?
6. Who is your typical client and who is your ideal client?
7. How do you get most of your new clients?
8. When not working, what do you enjoy doing?

So that you know where I am coming from, let me briefly describe the process I go through with clients before referring them to your office.