

How to Successfully Vet and Recommend Local Estate Planning Lawyers

- Laura Meier, Esq., Founder of Guided by Grace, an ICSC Strategic Partner

As Catholic leaders responsible for planned giving and major fundraising, it's essential to provide families with trusted recommendations for estate planning lawyers. A recent experience with a client who consulted with me after reading my book *Guided by Grace: A Catholic Journey Through Wills, Trusts, and Estate Planning* reminded me of the devastating fallout when families fail to choose the right lawyer.

The client I met with broke down the moment she walked into my office. She explained that a year ago, when her father became ill, she opened up the local church bulletin, saw three local attorneys had advertised their services, and chose to go with the cheapest one. Assuming they would all be good because they were all Catholic, she proceeded with confidence. Fast forward a year later, she was "in the middle of hell" because the cheap estate plan was not only insufficient and incomplete, but now that her father had passed, she was stuck in a three-year California probate court proceeding. This ordeal was not only consuming her time but also costing an extreme amount of money and regret.

Her tale is one of many—Catholic families who need proper estate planning guidance from a trusted attorney but lack the criteria to vet these professionals effectively. As Catholic leaders and foundation directors, you play a crucial role in guiding these families. Below are the top ten questions you should ask when vetting local estate planning lawyers to recommend to Catholic families:

1. **Does your practice focus exclusively on estate planning?**
 - A lawyer who practices multiple unrelated areas of law may lack the depth of expertise and experience needed for effective estate planning.
2. **How many estate plans have you personally drafted and administered?**
 - The number of estate plans a lawyer has handled provides a measure of their hands-on experience, which is crucial for effectively managing estate planning needs.
3. **What specific estate planning certifications or advanced training do you have?**
 - Certifications and specialized training indicate a higher level of expertise in estate planning, ensuring that the lawyer is well-versed in the latest laws and best practices.
4. **How do you draft your estate plans?**
 - Lawyers who use boilerplate templates may produce outdated documents with errors. Those who invest in robust drafting software can provide better plans and protections, tailored to individual needs.

5. **Can you handle complex situations, such as blended families, special needs trusts, business succession planning, and tax planning to minimize estate taxes?**
 - Handling complex situations requires specialized knowledge and experience, ensuring that unique needs are effectively addressed.
6. **What services are included in your fees? Will there be charges for changes, updates, or meetings?**
 - Understanding the fee structure and any additional costs helps avoid surprises and ensures transparency in billing.
7. **How do you communicate with clients and keep them informed about their plans and any relevant changes in the law?**
 - Clear and consistent communication is essential for keeping clients informed and ensuring their estate plan remains up-to-date with legal changes.
8. **How do you ensure that the plan will be executed smoothly upon a client's death or incapacity?**
 - Ensuring smooth execution of the plan provides peace of mind that the client's wishes will be honored and their beneficiaries will be protected. This includes guidance on properly funding the trust.
9. **Do you incorporate Catholic provisions in your estate planning documents?**
 - For Catholic clients, incorporating religious provisions ensures that the estate plan aligns with their faith and values. Not all Catholic lawyers are versed in Catholic teachings or offer legal provisions reflecting those teachings.
10. **Does the firm have a contingency plan if the lawyer retires or passes away?**
 - It is crucial to know that there is a plan in place for continuity of service. This ensures that the estate plan will still be managed and executed properly even if the primary lawyer is no longer available.

In addition to asking these questions, it is important to do your homework beforehand. Ask for lawyer recommendations from other trusted sources such as financial advisors, accountants, and other Catholic leaders. Checking online review platforms such as Yelp and Google can also provide valuable insights into a lawyer's reputation and client satisfaction. These reviews often highlight the experiences of past clients, giving you a clearer picture of what to expect.

By taking these steps, you can ensure with confidence that the lawyers you recommend to Catholic families are well-qualified, experienced, and capable of providing excellent estate planning services. This will help provide peace of mind and financial security for the Catholic families entrusted to your care.

About the Author: Laura Meier, Esq. is a family trust attorney, best-selling author, and television news personality. Her work has been featured on EWTN, NBC, ABC, CBS, FOX, and more. She and her husband, Joshua Meier, Esq. own the Meier Law Firm in Newport Beach, California and are the proud parents of four kids.