

LegalZoom Last Will and Testament

Congratulations! Getting your last will done is an important first step toward protecting your family. Now, with an attorney to review your document, you can be assured your will reflects all your wishes in the way you intended and is as strong as it can be. And if not, the attorney can help you make it better.

What to Expect

Typically, your attorney will cover eight primary topics during the review of your last will. He or she might address additional topics that are specific to your situation. Depending on how the review goes, you have one of four potential outcomes, which are described in more detail below.

Attorney review of your LegalZoom legal documents is one of many ways your legal plan can help you. To find out more about what your legal plan covers, visit www.legalzoom.com/plus.

Here are the potential outcomes of your review and what you need to do in each circumstance:

1. Execute and Store Your Last Will

If your attorney does not recommend any revisions to your last will, you simply need to execute it (sign and notarize, if applicable, in your state) and store the original and copies in a secure location. You will find detailed instructions on how to properly execute your will in your final package. After you have executed your last will, as part of your membership, you can store a signed copy at LegalZoom. Email your signed copy to vault@legalzoom.com or fax it to (323) 389-0598.

2. Revise Your Last Will

If, after reviewing your last will with your attorney, your attorney recommends revisions to your document, you can make them quickly and easily. Your plan membership includes unlimited revisions. Simply go to the Member Center, click the Estate Planning Documents tab and click the Revise link for the last will you need to revise. You will go through the questionnaire you've already filled out and update any sections your attorney advised you to revise. Be sure to click through all the pages until the very end so your latest changes are saved and submitted to us.

3. Create a Living Trust

If you have a more complex estate, your attorney might recommend you create a living trust rather than just a last will. In this case, LegalZoom will credit you for your last will so you can apply it to the cost of a living trust. Simply call customer care at (800) 773-0888 and let them know the attorney's recommendations and the representative can help you get started on a living trust. Also, as part of your legal plan membership, you automatically receive a 10% discount on any legal document, which will be applied at checkout.

4. Get Customized, Attorney-drafted Documents

If your estate planning needs are particularly complicated, your attorney may recommend a custom-drafted document created by an attorney. In this case, LegalZoom will refund the cost of your last will so you can apply it to the cost of your custom-drafted document. You will need to retain your attorney and pay him or her directly for customized documents. Simply call customer care at (800) 773-0888 and let them know the attorney's recommendations and the representative can help you. As part of your membership, you are entitled to a 25% discount on the attorney's standard rates.

Review Guide & Notes

Use this guide to follow along with the attorney during the review of your last will.

Last Will for: _____ Attorney Name: _____ Date: _____

I. Is a last will the right document for you? Your attorney will ask you a series of questions to make sure that a LegalZoom Last Will is right for you. If the attorney recommends a LegalZoom Living Trust or a custom-drafted document, please call (800) 773-0888 and explain that your legal plan attorney recommended a different document.

II. Review of your family information. Your attorney will review your family information to make sure that it is properly listed in your last will.

Family information notes:

III. Distribution of your assets and other possessions. Your attorney will review that your assets are being distributed according to your wishes and explain several clauses you may have in your last will that can be difficult for nonlawyers to understand.

Distribution notes:

IV. Custody and financial care of your children. If you have children, your attorney will review your choice of guardian and trustee, if applicable, and explain their responsibilities.

Custody notes:

V. Executor of your will. Your attorney will review your choice of executor and explain their responsibilities.

Executor notes:

VI. Other areas for review. Your attorney will explain other subjects that may be important to you, such as the custody rights of former spouses, and other provisions that you might consider including in your will, such as your final wishes.

VII. Execution and storage. Your attorney will explain the proper process for executing the will in your state and the importance of keeping a signed copy of your will in a separate storage location and safeguarding the original.

VIII. Other legal documents. Your attorney will work with you to determine if you need additional estate planning documents.

Other estate planning documents my attorney recommended:

☐ Living will ☐ Power of attorney ☐ Pet Protection Agreement® ☐ Other: _____

Additional notes:
