How Our Law Firm is Different…

Explaining to you how we're different requires an explanation of what the "traditional" experience with a lawyer is like. If you've worked with a lawyer to prepare estate planning documents for you in the past, this will sound familiar.

During the traditional experience, you'll go in and meet with a lawyer who will oftentimes make things seem very complicated and confusing. You'll have a good idea that the lawyer is smart and seems to know what he's doing, so you'll nod and answer questions, as if you understand everything. Because you want to do the right thing for your family, you'll have the lawyer prepare documents for you and you'll sign the documents, feeling relieved that you've got that taken care of.

You'll take your fancy planning binder home, stick it on a shelf or in a drawer, mark estate planning off on your checklist as DONE and never think about it again.

You might remember your lawyer said something about moving your bank accounts into the trust. So you'll go to the bank, forget what you were supposed to do, call your lawyer's office, get a voicemail, have to leave the bank and wait for a call back (which takes several hours at least and sometimes days) and by that time, you'll have gotten busy with other things and never get around to moving that bank account.

A few weeks later, you'll get a bill in the mail for $67.50 for 15 minutes of your lawyer's time for answering a couple of questions. You'll make a mental note – don't call lawyer ever again.

Several years later, you'll refinance your house or sell it and buy a new one and forget that you were supposed to let your lawyer know or make sure you kept the title in the name of the trust.

Your children will get older, making your guardianship choices outdated, but you don't want to call your lawyer because you know you'll get a bill in the mail two weeks later.

You'll hear something about a change in the tax law, but you figure you'd surely get a letter in the mail from your lawyer if it was something that affected you, so you don't worry about it. And, you'd have to dig through boxes to find your trust documents so you could remember your lawyer's name and find his contact information. Who has time for that?

It's not until you become incapacitated or die and your family finds the binder you stuck up on a shelf several years before and never looked at it again, that they'll realize your plan is so outdated that it has nothing to do with your life, your assets and the law.

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Your family is at a loss. They don't know where to turn or what to do, so they contact the same lawyer you used to prepare the documents, who is as happy as can be to probate your assets, which never made it into the trust.

How do I know all this?

Because it happened to my family when I was in law school and I swore it would never happen to my clients when I became a lawyer. And then, I spent several years in other law firms where I saw how easily it could happen.

Unfortunately, what I discovered is the estate planning industry was not designed to serve growing families who experience lots of change on their way to success. It was designed to serve 70 and 80 year olds who were preparing for death.

OUR FIRM HELPS YOU PREPARE FOR LIFE

What makes our firm different is that we were built with the needs of growing families in mind. We understand you are BUSY, you are growing, you are planning for a life of prosperity and you value ease, convenience and efficiency. You want to know you've made the best decisions for your family and that your plan will work when your loved ones need it most. You want to make sure your children would be taken care of in the best way possible and will be prepared to receive your wealth if anything happens to you.

That is our focus as well. We've developed unique systems to give you the same access to a lawyer as was previously only available to the likes of Bill Gates, Warren Buffet, and Sam Walton so you can have the guidance you need to build and maintain a life of prosperity and wealth.

We encourage communication with our clients. In fact, we've thrown out the time clocks so you never have to be afraid to call with a quick question (or even a not so quick question). Everything we do is billed on a flat-fee basis, agreed to in advance, so there are never any surprises.

When you call our office to ask your quick question, you won't have to wait hours or days for a phone call back. You'll get your question answered, right away. And, if you need to schedule a more in-depth legal or strategic call with your lawyer, a call will be scheduled when your both available and ready for the call so we can make the very best use of your time and not waste your time by leaving voicemail after voicemail back and forth.

And, we ensure the most important details of your planning are followed through on and your plan continues to work throughout your lifetime.

We ensure that your assets are protected throughout your lifetime and none of your assets will end up going through a long, expensive court process or being lost to the state because they were missed after your death.

We've created unique membership programs to keep your plan up to date year in and year out as well as give you access to our Trusted Team of Legal Experts for guidance on ANY legal or financial matter. One day you will need a lawyer. I don't know why and I don't know when, but when you do, you will be grateful you can call on us and we'll be here to advise you or get you out of a jam.

Lastly, we believe your financial wealth is only about a quarter of your overall “Family Wealth” which is made up of your far more valuable, Intellectual, Spiritual and Human assets – who you are and what’s important to you.

Most estate plans are only able to transfer your financial wealth to the next generation. The intangible nature of your much greater wealth makes it difficult to capture and it’s most often lost when someone passes. How much do you know about your grandparents values? Their most prized personal possessions? How they felt about you? What they had learned during their lifetime?

If you are like most people, you know very little. But, the wealthiest families capture these assets and pass them along right with their financial wealth. And, that‘s part of the reason the rich keep getting richer.

We’ve developed a tool that allows us to pass on your whole Family Wealth, including your Intellectual, Spiritual and Human assets. I can’t go into all of the details here, but we’ll definitely talk about it when you come into meet with us.

We look forward to seeing you and caring for your family soon!

Richard Seff

PS – if you think this all sounds expensive, well, you are right and you’re wrong. I can guarantee you that if you qualify to meet with our firm, that planning is **substantially less costly** than it would be for your family if you died with a plan that didn’t work or if you didn’t have a plan in place at all. And, I’ve never had a single family who believed in this kind of planning and wanted to put in place for their loved ones leave my office because they couldn’t afford it. This planning is the foundation for a life of success!