

# FAMILY & AGING

## Law Center

### Critical Preservation Process™



#### First Step: The Discovery Meeting

The purpose of the Discovery Meeting is to determine the current situation affecting your spouse, family member, or loved one. During your one hour meeting, Nicole will discuss your family, in detail, to identify what course of action is needed, so she can provide you with the best possible recommendations to meet your needs. The goal of this meeting is to educate you, outlining a plan to assist your loved one, and to relieve you of stress as quickly as possible.

#### Next: Decide and Hire

The hardest decision for most is simply committing to moving ahead. Some decide to move forward immediately and others take time, the decision is 100% YOURS. However, keep in mind starting quickly will allow us to potentially save your loved one the most amount of money and meet deadlines that you may be facing. If you decide to move forward we will provide you with: a list of documents to provide our office with, the appropriate application engagement agreement, and collect the appropriate authorizations from you, which will allow us to move forward. We strive to make your experience as stress-free as possible, so you can have Peace-of-Mind!



#### Second Step: Analysis

During Analysis, our office will review all of the checklist documentation. This step is crucial to the application process. It is important to provide our office with complete and detailed financial information. We will then advise you of any additional information we need, and provide you with an Analysis Task List for completion.



#### Third Step: Strategy

The Strategy stage is complete once you've provided our office with all required information, you've completed all of the Analysis Task List items, and our office sends you a confirmation letter indicating our final strategy determination. The Strategy Confirmation will include our final instructions to you in preparation of submitting the application.



#### Fourth Step: Implementation and Verification

At Implementation, our office will submit the application. We will send confirmation of the application submission date and our estimated expectations.

The Verification process is when we receive a formal request for additional information. You will need to provide us with any required additional information, within 7 days.

