

The Hive Law client guides

Your plan, start to finish

These are in the order they happen. Tick each one when it is done.

1

I just hired youOpen: **How It Works**☐

Our turn. You meet with Melissa to design your plan. Then we write your drafts and email them to you. After your meeting, there is nothing for you to do until the drafts arrive.

2

I got my draftsOpen: **Your Next Steps**

Also: How to read your drafts

☐

Our turn. When you tell us the drafts look right, we email you your final documents to sign. Nothing for you to do until then.

3

I am getting ready to signOpen: **Signing Instructions**

Also: What to initial on your Power of Attorney

Also: What to initial on your Health Care Directive

☐

4

I signed. Now what?Open: **After You Sign**☐

Our turn. We file your deed with your county. Then we email you the filed copy. Nothing for you to do until then.

5

I am moving my accounts into my trustOpen: **Funding Instructions**

Also: Filling out a beneficiary form

Also: Moving a bank account into your trust

Also: Putting a car in your trust

☐

6

My plan is finishedOpen: **Put Your Papers Away**☐

7

I am a trustee or a family member

A guide for this is coming soon.

**Every guide is in one place**

Go to www.thehivelaw.com/clients, or point your phone camera at this square.