



DEPARTMENT OF THE ARMY
OFFICE OF THE STAFF JUDGE ADVOCATE
CLIENT SERVICES DIVISION
BUILDING 4305, ROOM 317
6488 RODMAN ROAD
ABERDEEN PROVING GROUND MD 21005

Dear Client:

Prior to your appointment, please ensure you review the following information:

- a. **Estate Planning Worksheet.** The estate planning worksheet must be completed to the best of your ability prior to your appointment with a Legal Assistance attorney. You need only answer the questions that apply to you. Failure to complete the worksheet prior to your arrival may result in a NO SHOW appointment, thereby making you ineligible for an estate planning appointment during the next thirty (30) days.
- b. **Married Couples.** You and your spouse may be seen together as long as you have both seen and discussed each other's worksheets, and agree on the contents. You must also read and sign the Dual Representation Waiver and bring it with you to your appointment. Furthermore, you and your spouse must be seen together at the same time. Absent an emergency, failure to bring your spouse to the appointment may result in a NO SHOW appointment, thereby making you both ineligible for an estate planning appointment during the next thirty (30) days.
- c. **Two Appointments Required.** With the exception of deploying Soldiers and Civilians, estate planning appointments are scheduled in two parts. Part I is the attorney-client interview. Here, the attorney will go over your estate planning worksheet, discuss the difference between probate and non-probate assets, how to pass on your estate to minors (if applicable) and answer any other questions you may have. *No documents will be prepared at that time.* The attorney will later draft your documents and provide them to you for review (pick up or email). Once you have thoroughly reviewed your documents, you will contact our office to schedule your Part II execution appointment. Here, you will sign and execute your estate planning documents in the presence of two witnesses and a notary public, both of which will be provided by our office. A briefing will then be given on the safe keeping and storage of your documents.
- d. **Large Estates.** In the case of clients with a particularly large estate, a legal assistance attorney may refuse to provide estate planning services if the attorney believes the client would be more appropriately served by other estate planning and/or tax professionals.
- e. **Changes or Corrections.** Changes or corrections to your documents may not be made on the day of execution. They must be made prior to the scheduling of your execution appointment.
- f. **Cancellations.** All estate planning appointment cancellations must be made in accordance with our office policy (located on our website).

If you have any questions prior to your appointment, please contact us at 410-278-1583.

Sincerely,

The Client Services Division