



Estate Law:

Script 1: Initial Consultation

1. Introduction

VA: "Good [morning/afternoon], my name is [Your Name], and I will be assisting you today. Thank you for choosing [Law Firm's Name]. How may I address you?"

Client: [Client's Name]

VA: "It's nice to meet you, [Client's Name]. Before we begin, I want to assure you that all the information you share will be kept confidential. This call will help us understand your needs better and ensure we provide the best assistance. May I have your permission to proceed?"

Client: [Yes/No]

2. Basic Information

VA: "Great! Let's start with some basic information."

- Full Name:
- Date of Birth:
- Address:
- Phone Number:
- Email Address:

3. Family Information

VA: "Next, could you please provide some details about your family?"

- Marital Status:
- Spouse's Name (if applicable):
- Children's Names and Ages (if applicable):
- Other Dependents (if applicable):

4. Current Estate Planning



VA: "Have you done any estate planning in the past?"

- Do you have a will? (Yes/No)
- Do you have a living trust? (Yes/No)
- Do you have a power of attorney? (Yes/No)
- Do you have an advanced healthcare directive? (Yes/No)
- Do you have any other estate planning documents? (Yes/No)
- If yes, please specify:

5. Assets and Liabilities

VA: "To assist you better, we need an overview of your current assets and liabilities."

- Real Estate (Address, Market Value, Mortgage Balance):
- Bank Accounts (Type, Institution, Balance):
- Investment Accounts (Type, Institution, Balance):
- Retirement Accounts (Type, Institution, Balance):
- Life Insurance Policies (Provider, Policy Amount):
- Other Significant Assets (Description, Value):
- Outstanding Debts (Description, Amount):

6. Estate Planning Goals

VA: "What are your primary goals for estate planning?"

- Ensuring financial security for spouse/children:
- Minimizing estate taxes:
- Charitable donations:
- Business succession planning:
- Protecting assets from creditors:
- Other goals (please specify):

7. Specific Concerns or Questions

VA: "Do you have any specific concerns or questions regarding your estate plan?"

- [Client's Concerns/Questions]



8. Scheduling a Consultation

VA: "Thank you for sharing this information. It will be very helpful for our attorney to understand your situation better. Let's schedule a consultation with one of our estate planning attorneys."

- Preferred date and time for the consultation:
- Mode of consultation (In-person/Phone/Video):

9. Conclusion

VA: "Thank you, [Client's Name]. We've scheduled your consultation for [Date and Time]. You will receive a confirmation email shortly with all the details. If you have any further questions or need to reschedule, please don't hesitate to contact us."

Client: [Client's Response]

VA: "Thank you for choosing [Law Firm's Name]. Have a great day!"