

Selecting an estate planning attorney

Create a list of potential attorneys

- Start by asking for referrals and recommendations from family members, trusted friends, co-workers or your tax professional.
- Check with your employer to see if they offer an assistance or benefit program with access to local legal services.
- Visit the California State Bar’s website for a list of certified lawyer referral services: **<http://www.calbar.ca.gov/Public/Need-Legal-Help/Lawyer-Referral-Service>**.
- Search the American College of Trust and Estate Counsel to find attorneys specializing in wills and trusts: **<https://www.actec.org/fellows/directory/>**

Verify an attorney’s credentials

- Research potential attorneys on the State Bar of California website: **<http://www.calbar.ca.gov/Public>**. Here you can verify information and credentials, confirm their active status and look for any red flags affecting their eligibility to practice law in California. If you don't live in California, the website for your state bar association should be able to provide similar information.
- Check an attorney’s rating, reviews and any complaints with the Better Business Bureau: <https://www.bbb.org>
- Conduct an online search of a potential attorney and read client ratings and reviews of their experiences.

Prepare for your first meeting

After narrowing down your list of prospects, schedule meetings to interview them further. The following list of questions will be helpful in determining whether they are qualified to help you:

- Does the attorney focus on estate planning, or do they specialize in other areas?
- How many years of estate planning experience do they have?
- Do they charge an hourly rate or flat fee for their services?
- Will they assist in funding the trust with your assets?
- Will they provide you with the estate planning documents to review prior to signing?
- Is there a process in place for maintaining and updating your plan?
- How long do they estimate it will take to complete your estate plan?

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