From:	WealthCounsel Members Listserv
To:	WealthCounsel Members Listserv
Subject:	Re: [WCMLS]Real Life Problems with Legal Zoom Documents
Date:	Sunday, November 5, 2017 7:48:03 PM
Attachments:	image002.png image004.png

I had a client who prepared a Legal Zoom trust intending to leave everything to his youngest child from a second marriage, and nothing to the older children from a previous marriage. In the Legal Zoom interview, he just named the youngest child as his child, and did not name the older children at all, even to disinherit. As I recall, asking if someone should be disinherited was not (and maybe is not) part of the Legal Zoom interview, because it may trigger questions about what that means.

Fortunately, I was able to correct the problem by redoing the trust and naming the older children, then excluding them in the trust document, heading off a likely challenge in the future.

Sent by:

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From: WealthCounsel Members Listserv [mailto:Members@lists.wealthcounsel.com]
Sent: Sunday, November 5, 2017 6:12 PM
To: WealthCounsel Members Listserv
Subject: [WCMLS]Real Life Problems with Legal Zoom Documents

Colleagues,

I'm working on a seminar for financial advisors and one area I will focus on is how they can answer their clients who don't see the need to visit with a qualified attorney when they can just go to Legal Zoom.

I'm wondering if any of you have any real life examples regarding how a legal zoom instrument failed to do what the individual or family intended?

Thanks in advance.

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David

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