From:	WealthCounsel Members Listserv
To:	WealthCounsel Members Listserv
Subject:	Re: [WCMLS]Real Life Problems with Legal Zoom Documents
Date:	Monday, November 6, 2017 1:07:41 PM
Attachments:	Page from Last Will and Testament.pdf Untitled attachment 00555.txt

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I had the surviving wife come in after her husband died. They had done their wills on LZ leaving everything to the surviving spouse, but "if my [spouse] does not survive me then I give the entire residue to my descendants."

She had 2 children and 5 grandchildren, and was not happy to learn that they would probably all take in equal shares if she didn't revise it. Of course, they had wanted everything to go to their descendants *per stirpes*.

The LZ will did have a definition of "descendants" in it, but it did nothing to clarify the issue of *per capita* vs. *per stirpes*. All it did was include both biological and adopted descendants.

The offending page is attached, minus the client's name and initials that were at the bottom. Sometimes a slide with an actual example is interesting to the audience.

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"Helping This Generation Plan for the Next"

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On Mon, Nov 6, 2017 at 1:40 PM, Becky Cholewka <Members@lists.wealthcounsel.com> wrote:

> Could this also be posted in WDocx for us to view?
>
> **Becky Cholewka**
>
> CARE ENOUGH to Share
>
> *"Community Excellence Award"* March 2016, Power Ranch

"Boutique Law Firm of the Month" November 2013, Attorney at Law Magazine

"Top 10 Solo Practitioner of 2012" Attorney at Law Magazine

"Best of Gilbert 2012" Gilbert Award Program

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From: WealthCounsel Members Listserv [mailto:Members@lists.wealthcounsel.com]
Sent: Monday, November 6, 2017 12:27 PM
To: WealthCounsel Members Listserv <Members@lists.wealthcounsel.com>
Subject: Re: [WCMLS]Real Life Problems with Legal Zoom Documents

David,

You might find this recent webinar by Galia Aharoni, How to Fix Your Client's DIY Business Entity, helpful as you prepare for the seminar. Galia presented this webinar to Business Docx subscribers in July, and covered common issues encountered when clients try to do it themselves (using Legal Zoom and the like).

Good luck!

Jenny

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On Sun, Nov 5, 2017 at 7:12 PM, David Meredith <Members@lists.wealthcounsel.com> wrote:

> 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.
>
> --

David

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