Law Offices of
Thomas J Bouman PLLC

Estate Planning • Inheritance Protection

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10 Practice Features

1. **Fixed Fees: No Hourly Billing**

In order to maintain a logical, consistent, and fair pricing system, most services are priced according to a fixed price schedule. In other words, every client will know the cost up-front, before any work begins. The fixed price schedule includes various levels of service. Each client may choose one tailored to the client's objectives and budget.

2. **No Paralegals**

I am constantly improving systems and procedures so that I have the time to work directly on client matters rather than delegate them to a paralegal or legal assistant. All tasks are completed by someone who knows the client personally.

3. **Wealth Counsel Membership**

I am a proud member of Wealth Counsel, the nation's largest organization of estate planning attorneys. Wealth Counsel provides me with the support system of a large law firm, while allowing me to maintain the highly personalized level of service that only a solo attorney can provide.

4. **Premiere Legal Software**

In order to produce the highest quality work product, I use the premiere estate and trust software programs on the market today.

- WealthDocs™ for estate planning
- Probate Partner™ for Arizona probates
- Settlement Counsel™ for trust settlement
- WealthDocs Asset Transfer System™

5. **No Annual Maintenance Fee for Estate Plans**

A common approach by estate planning law firms is to charge an annual fee whether or not changes to an estate plan are actually made. My alternative is the Review and Refinement Program, which includes regular invitations to review the estate plan without the costly annual fee, combined with predictable costs to update documents.

6. **Free Comprehensive Review of Existing Trusts and Wills**

I will provide a complimentary review of any existing living trust or will. A poorly drafted document is exposed when compared to my comprehensive 50 issue checklist.

7. Use of Technology

I use remote online access software and video conferencing to let clients work collaboratively with me on documents when it is not possible or convenient to meet in person. In addition, I use self-publishing software to present each estate planning client with a beautiful hardbound book containing a copy of the estate plan instead of the traditional three-ring binder. Also, I was one of the first estate planning lawyers in Southern Arizona to accept Visa and MasterCard for payment of fees.

8. Inheritance Protection

As a response to the changing culture and economy of the United States, I have developed a new practice area called "Inheritance Protection." I educate clients and their beneficiaries about the use of cutting-edge techniques to protect heirs from losses associated with divorce, lawsuits, taxes, and poor financial management. Even the most responsible, financially-savvy adult child appreciates the minor restrictions of a protected inheritance. Inheritance protection is a priceless gift – something a child cannot achieve without advanced planning by the parent.

9. Estate and Trust Settlement Services

I provide a complete array of services to trustees and personal representatives who face the daunting task of administering a trust or probate for a loved one. I strive daily to become the most organized and knowledgeable estate settlement attorney in Southern Arizona. This includes expertise handling informal probates, trust administration, and transfer of retirement accounts, life insurance, and annuities.

10. Straight Talk

Will I try to persuade a client to pay for something the client thinks is unnecessary? Maybe. Will I try to persuade you to pay for something that I think is unnecessary? Absolutely not. I will give my honest opinion, period.