



6 Mistakes Families Make

When Choosing An Estate Planning Attorney

Make a wise and loving choice for
your family and your legacy.



Small Planet Law LLC



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HI, I'M BOBBIE

PERSONAL FAMILY LAWYER

Thanks for taking a moment to read this guide. My goal is to share what I've learned from serving Colorado families — the things I wish everyone knew before choosing an estate planning attorney.

Most people I meet aren't looking for jargon or scare tactics. They just want someone who will explain things clearly, answer their questions honestly, and help them make good decisions for the people they love.

So that's the spirit of this guide. No legalese, no pressure — just straightforward information to help you feel more confident as you explore your options.

Let's dive in.

6 Mistakes To Avoid When Choosing An Estate Planning Attorney

Did you know...

A lot of families end up navigating their legal and financial planning without much clarity.

Even those who have worked with a lawyer before sometimes feel like they're still in the dark about what their plan actually does, whether it will work the way they hope, or even where the different pieces are located. It doesn't have to be that way.

You deserve an experience that feels supportive, clear, and responsive — the kind where your questions are welcomed, things get explained in plain language, and you walk away feeling confident about the choices you've made for the people you love.

And I know this isn't anyone's favorite topic. Thinking about a time when you may not be here is hard. But estate planning isn't only about "what happens when I'm gone." It's also about making sure your life is protected now by:

- Keeping your assets and children protected
- Ensuring your wishes are honored if you ever can't speak for yourself
- Giving you the peace of mind to live fully, knowing things are taken care of

...At its best, estate planning is about caring for your family and everything you've built with a thoughtful, grounded approach.

6 Mistakes To Avoid When Choosing An Estate Planning Attorney

As a Personal Family Lawyer®, it breaks my heart to hear stories of families who found themselves overwhelmed during some of the hardest moments of their lives — sorting through legal questions, trying to make sense of paperwork, or feeling unsure where to turn after losing someone they love.

Often, it's not because they didn't care or didn't try. It's because they never had a trusted advisor to help them put a solid plan in place, or the plan they had wasn't built with enough care or clarity.

Here's the good news:

You are already moving in a different direction. By taking the time to read this guide, you're giving yourself and your family more clarity and more confidence.

In the next few pages, you'll learn how to get meaningful guidance — the kind that actually supports your family — and how to avoid the common pitfalls that leave so many people feeling unprepared.

Here are the six biggest mistakes I see families make, and how you can make thoughtful, informed choices instead.



Trying to Handle Everything Yourself With Online Forms or Low-Cost, Documents-Only Services

It's completely understandable why people turn to online programs or very low-cost options. They're convenient, they look simple, and it feels like a quick way to check an important task off the list.

The challenge is that estate planning isn't just about filling in blanks — it's about making sure the plan actually works for your family when it matters.

What we see too often are families who did everything "right" according to the online instructions, only to discover later that something critical was missing, unclear, or not legally effective in Colorado. And by the time those gaps show up, it's usually during a stressful moment when loved ones are already carrying a lot.

I've also seen families come in with plans that were created with the best intentions — sometimes by other attorneys, sometimes by DIY tools — but still needed to be "undone" or rebuilt because key pieces weren't aligned or the plan didn't reflect the family's goals. The financial cost is one thing, but the time, confusion, and emotional strain are often the heavier burden.

Online tools can be helpful for learning the basics, but they can't spot the nuances, exceptions, or state-specific issues that make the difference between a plan that works and one that unintentionally creates extra cost, delay, or confusion.

A solid estate plan is more than a stack of papers. It's a thoughtful process guided by an expert who takes the time to understand your family, your values, and the future you want to protect.

That's why choosing a well-trained, caring professional — someone who puts your interests first and doesn't rely on one-size-fits-all templates — is one of the most meaningful gifts you can give your loved ones. **Real peace of mind comes from knowing your plan will work the way you intended, not just look complete on paper.**

Choosing a Lawyer Who Bills Hourly or Advertises Very Low-cost Packages

Estate planning is one of those areas where the fee structure really matters. A good plan isn't just a set of documents — it's a process, and it should include thoughtful guidance, clear communication, and support over time. That's why most experienced estate planning attorneys use flat fees for comprehensive planning. It allows you to know the cost upfront and ask as many questions as you need without worrying about a running clock.

Hourly billing for estate planning can sometimes mean one of two things: either the scope isn't clearly defined, or the attorney may still be learning this area of law and can't confidently quote a flat fee. Neither is ideal when you're trying to create something as important as your family's long-term plan.

On the other end of the spectrum, extremely low-cost offers (the \$399 specials or plans under \$1,000) often come with limitations. Sometimes they're documents-only services with little guidance. Sometimes they're designed to lead into upsells. And sometimes they simply don't include the level of care needed to create a plan that will hold up over time.

Families often choose these options thinking they're saving money, only to discover later that something important was missed or needs to be redone. The financial cost is one thing, but the stress and uncertainty during a crisis are often the bigger burden.

If you're considering a flat-fee service, here are a few helpful questions to ask:

- Are all of your fees flat fees?
- What kind of support is included after my documents are signed?
- What happens when I call with legal questions 2 years from now?
- What if the questions are about something other than my estate plan?
- Will you help ensure my assets are titled correctly so the plan actually works?
- Will you keep my plan up to date as my life, the law, and my assets change? How does that get paid for?

Clear answers to these questions can help you understand whether you're getting a one-time transaction or a long-term relationship — and whether the plan you're paying for will actually work when your family needs it.

Not ensuring there is a plan in place for regular communication as your life, the law, and your assets change.

An effective estate plan isn't something you create once and never revisit. Life changes — sometimes in big ways, sometimes in small ones — and your plan needs to evolve with you. There are two key things to think about:

a) What happens when things change?

Your life will shift over time. You may rethink who you want to raise your children or manage your finances. Your kids will grow up, build their own lives, and develop in ways you couldn't have predicted. You may buy or sell a home, start or close a business, invest in something new, or help a family member financially. Your assets will change, and your wishes may change too.

A strong estate plan accounts for all of this, but only if someone is partnering with you keep it current. That includes making sure your assets are titled correctly, because even the best documents won't work as intended if the ownership of your assets doesn't match the plan.

And as you age, you may need more support. Your children or other loved ones may have questions or concerns. Having a lawyer who knows you, knows your plan, and is available to guide your family can make a tremendous difference.

Then there's the law itself. Tax rules and estate laws shift regularly, and those changes can directly affect your plan. Staying informed shouldn't be your job alone.

A lawyer who stays in touch, welcomes your questions, and proactively updates you about legal changes can help ensure your plan continues to work the way you intended.

Continued: Not ensuring there is a plan in place for regular communication as your life, the law, and your assets change.

a) Does the package fee include regular review of your plan?

If your plan doesn't include periodic check-ins, you'll be responsible for remembering to schedule reviews — and you may face additional fees each time. That's why many families appreciate having an ongoing maintenance or membership program. It keeps the plan up to date, spreads out the cost, and provides peace of mind knowing someone is looking out for the big picture.

The ideal arrangement is one where your lawyer offers a membership program with regular reviews, ongoing support, and help keeping your plan aligned with your life as it evolves. It's a simple way to make sure your plan stays current and reliable for the people you love.

Focusing only on the “obvious” assets and overlooking the deeper legacy you want to leave for your family, your community, and our world

When most people think about estate planning, they picture wills, trusts, and bank accounts. But the truth is, the things that shape a family, and shape our shared future, go far beyond dollars and documents.

If you had to choose between leaving your family an inheritance or leaving them your values, your stories, your love for our living world, and your commitment to community, the choice is obvious.

Money can be rebuilt. A sense of purpose, belonging, and responsibility to others is what truly carries a family, and a society, forward.

Yet traditional estate planning often ignores this entirely. Many plans focus only on financial wealth, even though most of us care just as deeply about passing on the things that can't be measured:

- the principles that guide your decisions
- the stories that shaped you
- the values you hope the next generation carry
- the ways you've contributed to your community
- the hopes you hold for a healthier, more sustainable world

When these pieces aren't intentionally included, they're often lost — not because families don't care, but because no one created space for them.

At Small Planet Law, we treat these intangible gifts as essential. We help you capture the wisdom, experiences, and values you want to pass on — including your commitments to the causes you care about — so your legacy reflects the full picture of who you are and what you stand for. There's no extra fee for this. It's simply part of honoring the whole of your life and the future you want to help shape.

Your legacy isn't just what you leave behind — it's the world you help create. A thoughtful plan should reflect that.

Expecting Poor Service and Receiving It.

Many have shared with me their frustrating experiences with lawyers: calls that go unanswered, unexpected invoices, or interactions that feel rushed or intimidating. It's understandable that families come to estate planning expecting the same.

But you deserve better.

Look for a lawyer who has the support and systems in place to communicate clearly and consistently. A solo attorney without any team or structure can easily become overwhelmed, which often leads to delays in returning calls or emails. A well-organized practice should have a reliable process for answering questions, scheduling time with you, and making sure you feel taken care of.

It's also reasonable to expect transparency around fees. You shouldn't receive surprise bills or be charged in tiny increments for every question you ask. Estate planning works best when you feel comfortable reaching out, not worried about the cost of doing so.

When you meet with a prospective lawyer, ask about their approach to service. What does communication look like in their office? How do they make sure clients feel supported? How do they handle questions that come up after the plan is signed?

If those questions seem unusual to them or if they can't describe a clear, client-centered process, that's a helpful sign to keep looking.

You're entrusting someone with your family's future. It's completely appropriate to expect thoughtful, responsive, and respectful service.

Choosing a lawyer who is not an expert in the kind of service you actually need.

From the outside, it can look like all estate planning lawyers offer the same services in the same way for roughly the same fees. **In reality, there's a lot of variation in training, focus, and approach.**

Every lawyer has their own background. Some concentrate on tax law, business matters, litigation, or a wide range of general legal issues. Those skills can be valuable — but they don't necessarily translate into the kind of guidance most families are looking for when planning for the future.

When I talk with families, I hear the same themes: you want to work with someone who sees you as whole people, understands your goals, and creates a calm, supportive environment. You want a lawyer who honors your family's unique needs and the values that guide your decisions.

Estate planning isn't one-size-fits-all. Different families have different needs, and your lawyer should have experience with the specific issues that matter most to you.

- **Young children at home?** Choose someone who regularly works with families navigating guardianship and long-term planning.
- **Caring for aging parents?** An attorney with elder-focused training can help you manage those complexities.
- **A child with special needs?** Your lawyer should understand special needs planning and long-term care considerations.
- **Strong community or environmental values?** Seek someone who can help you align your plan with sustainable choices, charitable giving, and the legacy you want to leave for your community and our world.

If a lawyer doesn't work with families every day or doesn't take the time to understand what truly matters to yours, they may not be the right fit to help you build a plan that reflects your life, your priorities, and your vision for the future.

Choosing the right lawyer is about finding someone who understands your family, honors your values, and helps you create a plan that supports both the people you love and the world you hope they inherit.



Here's the bottom line:

You want a lawyer who can help you make good decisions — someone who gives you clarity, confidence, and a sense of ease as you plan for your family's future. Estate planning isn't just about documents; it's about feeling informed, supported, and empowered every step of the way. That takes a particular kind of lawyer and a particular kind of relationship.

That's a hallmark of the Personal Family Lawyer® way, and that's how we practice estate planning at the **Small Planet Law**.



Your Next Step:

Now that you know the "6 Mistakes" and how to avoid them, your next step is simply taking action to protect your loved ones, your assets, your business, and the legacy you're building.

As a thank-you for taking the time to review this guide, I'd like to offer you a Life & Legacy Planning Session™. During this session you will get more financially organized than you've ever been before and you'll have the space and guidance to make thoughtful, informed decisions for the people you love.

You can begin by booking a call at SmallPlanetLaw.com or calling our office today at 303-535-4311 to schedule your Life & Legacy Planning Session. **Be sure to mention this guide to receive the planning session at no charge.**

Small Planet Law would be honored to support you and your family as you take this important step toward a more secure and intentional future.