



TULLY LAW GROUP

ELDER CARE AND ESTATE PLANNING

HONOR & PROTECT

What to Expect During Your Initial Meeting...

For nearly 30 years, our team at Tully Law Group continues to help individuals and families plan for the future, protect their assets, and ensure their wishes are honored.

During your first meeting, we will:

- Learn about you, your family, and your goals for the future.
- Understand your priorities — whether that's providing for children, avoiding probate, minimizing taxes, or protecting family wealth.
- Discuss options for Wills, Trusts, Powers of Attorney, and Health Care Directives.
- Create a roadmap to achieve your goals efficiently and with peace of mind.

Our priority is to get to know you and ensure we create an estate or protection plan tailored to your needs. If long-term care or aging-related concerns are part of your plan, we can integrate those considerations into your strategy — but only if they are relevant to you.

By the end of the meeting, we'll identify the right next step — whether that means starting the process with us, involving other family members, or providing a referral to another professional who may better meet your needs.

We all look forward to meeting you.