Welcome

OC Elder Law

by Marty Burbank

OC ELDER LAW
BY MARTY BURBANK

Welcome

Marty Burbank, *J.D., LL.M.*
Joshua D. Ramirez, *J.D., LL.M.*
Kim Raulino, *Paralegal*
Julie Cary, *Paralegal*
Ericka Nunez, *Office Administrator*
Alicia Meza, *Legal Secretary*
Bill Burbank, *Marketing Director*

Thank you for scheduling an appointment with OC Elder Law.

We wanted to take this opportunity to introduce our firm. We hope you find this information useful.

Should you have any questions before your appointment, please do not hesitate to contact our office.

We look forward to working with you and providing you with excellent legal service to plan for and protect your family.

Respectfully,

Marty Burbank, Esq.   Joshua D. Ramriez, Esq.

Directions & Parking

We are located at:
619 N. Harbor Blvd.
Fullerton, CA 92832

Convent Parking
Along Side Building

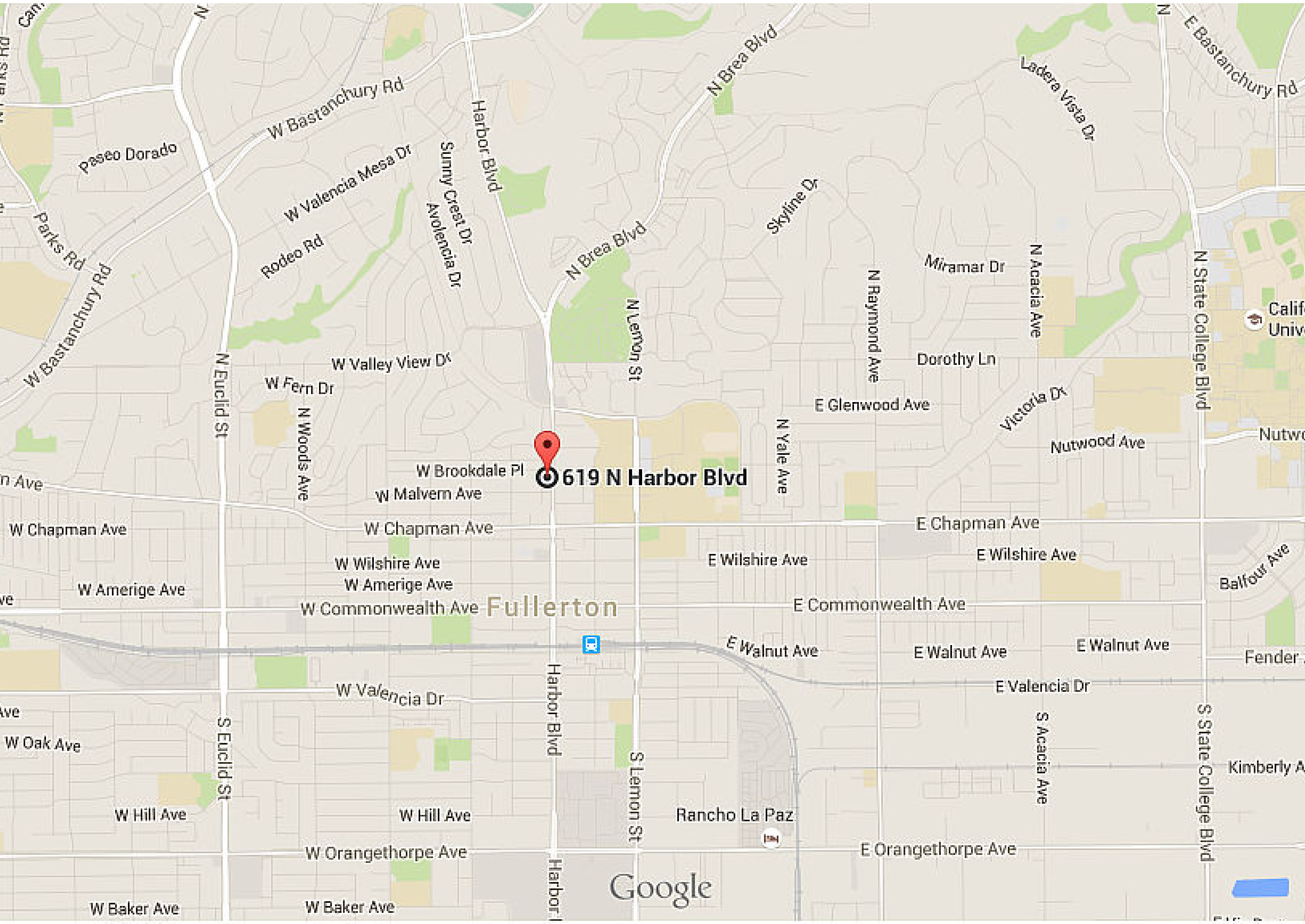
We are conveniently located in Downtown Fullerton.

From the 57 Freeway, head west on Chapman Ave. Turn right on Harbor Blvd. and we will be on your left hand side.

From the 91 Freeway, head north on Harbor Blvd. Pass Chapman Ave. and we will be on your left hand side.

From La Habra, Head south on Harbor Blvd. We are 1.3 miles past St. Jude, on the right hand side of Harbor.

Map



619 N Harbor Blvd
Fullerton
W Bastanchury Rd
Paseo Dorado
W Valencia Mesa Dr
Sunny Crest Dr
Avolencia Dr
Harbor Blvd
N Brea Blvd
Ladera Vista Dr
E Bastanchury Rd
Parks Rd
Rodeo Rd
Skyline Dr
Miramar Dr
N Acacia Ave
N Raymond Ave
N State College Blvd
Dorothy Ln
N Lemon St
W Valley View Dr
W Fern Dr
N Euclid St
N Woods Ave
E Glenwood Ave
Victoria Dr
Nutwood Ave
N Yale Ave
W Brookdale Pl
W Malvern Ave
W Chapman Ave
E Chapman Ave
W Wilshire Ave
W Amerige Ave
E Wilshire Ave
Balfour Ave
W Commonwealth Ave
E Commonwealth Ave
E Walnut Ave
W Valencia Dr
E Valencia Dr
W Oak Ave
S Euclid St
S Lemon St
S Acacia Ave
S State College Blvd
W Hill Ave
Rancho La Paz
W Orangethorpe Ave
E Orangethorpe Ave
W Baker Ave
Google

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What to Expect

When you arrive for your appointment you will be greeted by one of our friendly team members. They will invite you into one of our comfortable conference rooms. Our team members will provide you with water and offer you sodas, tea, coffee, and wine. If you would like any of these please let us know.

If you have to use the restroom, we have a wheelchair friendly facility.

Once seated and comfortable, you will be meeting with one of our attorneys. A Paralegal or Legal Assistant will also join the meeting to take notes.

Everything discussed is confidential. Please be open and honest about your family, your goals, and your finances.

Our Process

Initial Meeting:

We set aside two hours for our initial meeting. During that time we will talk a lot about yourself, your parents, and your children. We do this not only to get to know you, but to find out your values and goals. In order to do the most comprehensive planning, we need to know about you. Our goal is to go beyond who gets what.

If you choose to retain our firm at this meeting, we will finalize any planning and gather some more information. We will also prepare a fee agreement that outlines the scope of our work. Please see the "Fees & Payments" section of this packet for more information.

After talking about you, we will talk about the law and design a plan for you and your family. During this time, please interrupt and ask questions. We want you to be comfortable with any plan we create. We will talk about current legal issues, taxes, and future legal issues. These topics can be overwhelming, so we will make the process as simple as we can.

During this meeting, finances need to be discussed so please have a thorough understanding of your assets and income. Additionally, please bring any prior estate plan you have already executed.

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Our Process

After the Initial Meeting:

After you retain our firm, we will mail you a more thorough terms of engagement. This is simply to further explain our process and set expectations.

During the weeks after our meeting, we will be drafting your plan. While we do so, we may have a list of items for you to complete. If we need documentation, we will advise you on the best way to get it to us. If we have any questions during this time, we will reach out to you. This is also a great opportunity to follow up with us if you have any further questions about your plan.

Once your plan is drafted, we will send you a summary of your plan and confirmation of names document. Once you review these documents, please let our team know if there are any questions, corrections, or changes.

We will have final documents printed and ready for you to sign at our Signing Meeting.

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Our Process

Signing Meeting:

When you are ready to execute your plan, you will meet with one of our Paralegals or Legal Assistants. Please have your identification ready for them as they may need to notarize some of your documents.

We schedule two hours for this meeting. However, if all of your questions are answered before this meeting, it may not need to be as lengthy of a meeting.

Once your plan is executed and notarized, we will scan these documents into our computer system. We do this so that we will have a copy in the event of an emergency or disaster.

After this meeting, you may have some homework to complete. Our Paralegals or Legal Assistants will discuss your next steps. Please contact our office if there are any questions through this process.

Once the plan is fully implemented and all assets are aligned with your goals, we want to have a family meeting.

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Our Process

Family Meeting:

The purpose of this meeting is to help explain your plan to your children, beneficiaries, or anyone whom you think it important to know. We schedule this meeting for one hour so as not to inconvenience anyone you bring.

In this meeting we will talk to the person you chose to be in charge during your incapacity, who will take over when you pass away, and your beneficiaries. We will not discuss money unless you would like us to. You set the parameters of this meeting. We want your whole family to understand the plan you set up for them.

During this meeting, please let us know before the meeting if there are sensitive issues we should or should not address.

Our relationship will not end at this meeting. Let's keep having conversations as life goes on. We would like to schedule a follow up meeting one year from this family meeting.

Fees & Payments

Some clients wish to know our fees before we talk. This is a very difficult question. Different considerations are taken into account when fees are calculated including the level of complexity, the amount of work, and the amount of liability.

Should you retain our firm, we typically collect fees before we begin drafting your plan. Occasionally, clients would like to pay half of the fees before we begin drafting and pay the other half when the plan is ready to be executed. We are happy to accommodate these requests.

We accept checks and credit cards for payments. We are happy to break down fees for your accountant, as a portion of our fees is tax deductible.

About our Team

These are our team members. To learn more about them, please visit our website at www.OCElderLaw.com and click "About."

Marty Burbank, J.D., LL.M.

Joshua D. Ramirez, J.D., LL.M.

Kim Raulino, Certified Paralegal

Julie Cary, Certified Paralegal

Ericka Nunez
Office Administrator

Alicia Meza,
Legal Secretary

Bill Burbank,
Marketing Director

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Review us on Avvo

If you are satisfied with our level of service, please review Marty Burbank and/or Joshua Ramirez on Avvo.com.

Avvo.com is a website where you can search for a local attorney and review his or her credentials and background before you meet them.

A positive review and referrals are the best compliments you can give!

If there is anything you feel we can do better, please schedule a lunch with Marty or Josh as we are always striving to offer the best service to our clients.