



Estate Planning with an LDA

Estate planning is planned protection. Having a plan provides protection for your loved ones and insulates your estate against court intervention, unexpected loss of control and exorbitant costs.

One of the barriers to getting a plan done is the cost. If this is a concern, consider using an LDA. Under Business & Professions Code 6400, a Legal Document Assistant is authorized to prepare legal documents for consumers. Registered and bonded Legal Document Assistants (LDAs) are not attorneys; however, they can assist you in the preparation of your legal documents, at your direction.

An LDA must be bonded, registered and complete on-going continuing education, at 2-year intervals, as a condition of their county registration. An LDA prepares legal documents and provides general published factual information that has been written or approved by an attorney pertaining to legal procedures, rights or obligations, to assist self-represented consumers. The LDA cannot give you legal advice or represent you in a court of law.

Contact your local county recorder or ask a prospective LDA for confirmation of their current registration.

An experienced LDA might be a good match to assist with self-directed initial document preparation, amendment of existing documents or settlement of the estate. Many who have already had a Trust prepared have failed to fund it properly leaving assets exposed to costly probate costs and fees. An LDA who specializes in estate planning can assist you with funding, as well. Using an LDA is extremely cost effective.

Colleen Marie is a bonded and insured LDA, Legal Document Assistant, registered in San Diego, California, allowing her to assist clients in the entire State of California. She is able to assist in the self-directed document preparation, Revocable Trust funding, settlement and the self-directed administration of Estate Planning Documents. Her practice was established in 1994. Colleen is a Voting Member, on the Board of Directors, of CALDA, the California Association of Legal Document Assistants, www.CALDA.org, a Certified Estate Planner and NICEP member, the National Institute of Certified Estate Planners, www.nicep.org, a Member of the NEA, the National Ethics Association, www.ethics.net and an Affiliate Member of the ABA, American Bar Association, www.americanbar.org.

As an LDA, Colleen Marie provides services directly to the consumer. For additional information Colleen can be reached at 858-750-7350 or colleen@cmassociates.com

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