

## INSIGHTS + NEWS

### Nina Dow Presented the Estate Planner's Roadmap from Client Intake to Post-Mortem Planning

On January 16, 2026, [Nina Dow](#) spoke at a new MCLE program and provided attendees with a roadmap from client intake to post-mortem planning. She reviewed the full scope of representing clients in their estate planning and illustrated how taking proper steps along the way can benefit your clients' estates and your practice. Topics included:

- Dealing with Engagement Letters, Consultations, and Billing
- Recommended Steps for Proper Intake and Thinking of the Estate Post-Mortem
- First Client Meeting and Top Ethical Traps
- Process of Completing Client Work
- Signing of Estate Planning Documents and More Ethical Traps
- Post-Signing Clean-Up and Matters, Including Closing Letter

[View the Recording](#)