

Everything you're wondering about estate planning and Vanilla.

We know the questions clients ask most often. Here are honest answers to all of them—so you can move forward with confidence.

1 . I already have an attorney. Why would I use this software?

Having an attorney is a great starting point—and Vanilla Document Builder is designed to work alongside that, not replace it.

Two situations where it adds value even if you previously engaged an attorney:

Your documents are outdated or you haven't heard from your attorney in years. Foundational documents (wills, trusts, powers of attorney) need to stay current as your life changes. Vanilla gets them updated quickly and at a transparent cost—without a lengthy back-and-forth engagement.

You want your advisor involved. Vanilla keeps your financial advisor in the loop throughout the process, so your estate plan actually connects to your broader financial picture—something a standalone attorney engagement often misses.

For situations that need custom or complex legal work, Vanilla connects you to its Attorney Network—100+ estate planning professionals across all 50 states.

2 . Are these documents actually as good as what I'd get from a law firm?

Yes—for foundational estate planning documents. Every Vanilla Document Builder template was designed by elite estate planning attorneys and tailored to your state's specific laws. These are the same institutional-quality templates used by leading wealth management firms.

What you get:

- Revocable Living Trust
- Pour-Over Will
- Healthcare Advance Directive
- Financial Power of Attorney
- Certificate of Trust
- HIPAA Authorization
- Credit-Shelter Structures
- Advanced Planning Configurations

For highly customized or complex situations—special needs trusts, business succession, unique customizations—you can directly engage an attorney through the Vanilla Attorney Network.



3 . How long does this actually take?

The questionnaire typically takes 15–20 minutes to complete—you can do it in one sitting or come back to it. Execution-ready documents are typically available within a few business days after you finish.

Compare that to the traditional process: scheduling consultations, back-and-forth drafts, weeks or months of delays. Vanilla compresses that entire timeline without sacrificing quality.

4 . How is my information secured?

Vanilla maintains on SOC 2 compliant security, and your data is used only for your estate planning documents. Your advisor has visibility into your progress, but specific responses and document drafts are only shared with your advisor after documents are finalized.

Vanilla publishes its full security and compliance documentation at justvanilla.com/trust-security.

5 . What does it cost?

Pricing is managed through your advisor and coordinated as part of your overall planning relationship. The Vanilla Attorney Network's model uses flat-fee pricing—no surprise bills or hourly charges. Your advisor can walk you through exactly what's included.

For context: traditional estate planning attorney engagements for similar documents often run \$2,000–\$5,000+. Vanilla's approach is transparent and predictable.

6 . Does my advisor see everything I fill out?

Your advisor can see your progress through the questionnaire in real time, but specific answers and document drafts are not shared until your documents are finalized.

Once complete, your advisor receives your estate diagrams and document summary, which become the foundation for ongoing planning conversations.

7 . What happens after I'm done filling out the Vanilla Document Builder questionnaire?

1. You sign and execute. You'll receive downloadable documents ready for signing. Notarization and witnessing is your responsibility—Vanilla provides state specific execution instructions and your advisor can help you understand what's needed for your state.

2. Your advisor gets a complete picture. Visual estate diagrams and a document summary flow directly into your client profile.

3. Ongoing planning begins. Creating documents is the start, not the end. Your advisor uses the completed plan as a foundation for continued conversations about estate health and future planning needs.

Still have questions?

Your advisor is your best first stop. They can walk through anything in this document, review your specific situation, and help you decide what's right for you.