



# Legal Services Agreement

## 1. Identification of Parties

This Agreement is made between Wood Legal Group, LLP (“Law Firm”), and \_the acceptor of the Special Offer (“Clients”).

## 2. Legal Services to be Provided

Law Firm will provide the services designated on Exhibit A. No services other than those set forth in Exhibit A are included.

## 3. Fees

Depending on the type of engagement, the Law Firm bills for its services on a flat fee basis, an hourly fee basis, a statutory fee basis or other fee that is approved by the court. Costs incurred, such as filing fees with court or county recorder’s office, are in addition to the fees charged. Regardless of the fee arrangement, balances more than thirty days in arrears will be subject to interest charges at the legal rate.

## Your matter will be billed as follows:

### Fees

**XXXX Flat Fee** - The legal services described above will be provided for a flat fee of: \$6,975

The full amount of the flat fee indicated above is due upon signing. Fees are considered earned when paid.

This fee is fixed and does not depend on the amount of work performed or the results obtained. Clients acknowledge that this fee is negotiated and is not set by law. The fee shall be paid by Clients upon execution of this Agreement. Clients agree that the Flat Fee, upon payment, becomes the property of Attorney and need not be deposited into the Attorney/Clients trust account.

*Clients understands that the Clients has a right to require that the flat fee be deposited in a trust account until the fee is earned. The Clients is entitled to a refund of any amount of the fee that has not been earned in the event the representation is terminated, or the services for which the fee has been paid are not completed.*

Clients understand that Attorney's regular hourly rate is \$750.00. The earned fees will be calculated based on Attorney's regular hourly fees for purposes of refund of unearned fee if the representation is terminated, or the services for which the fee has been paid are not completed. For estate planning clients, the initial 80% fee is considered fully earned after the initial consultation. The entire fee above is considered fully earned three (3) weeks after the initial consultation.

## Costs

Client also may be required to advance certain costs and reimburse other costs incurred in representing you in your legal matter. These include, but are not limited to, certain court filing fees, fees for court personnel, such as court investigators or probate referees, recording fees, copying and certification fees, publication costs, etc. Law Firm generally does not charge for photocopy expenses, facsimiles or phone calls, unless they are in excess of \$5.00 for any one occurrence. Law Firm does request reimbursement for certified mail and expedited mail (Express Mail) or delivery services (such as FedEx and UPS) as well as bank wire costs. At this time, it is anticipated that the total costs for this engagement will not exceed \$\_\_\_\_\_.

## Payment

Please make payment of \$6,975.00, which represents:

XXX payment in full for legal services

- plus SOME of your anticipated costs
- plus ALL of your anticipated costs or
- just your anticipated costs.

The balance of the legal fees and repayment for advanced costs, if any, is due upon completion of your engagement. *There will be a \$25.00 charge, due immediately, for any check that is returned unpaid.*

To make a payment for your legal fees, you can either use e-check, credit card or finance through ClientCredit using LAWPAY, a third-party payment processor. We will send via separate email.

## 4. Clients' Responsibility

Before Law Firm has an obligation to perform any services for Client, Client must sign this agreement and make the payments required in paragraph 3 above.

## **5. Notice of Team Approach to Estate Planning**

To help implement Client's plan, Law Firm often works with \_OnePacific Financial, a financial services company, ("Financial Firm"). In this team approach, Law Firm provides legal advice and creates estate planning documents. If Financial Firm is involved in Client's planning, its representatives will provide financial services and products. Both firms are independent companies but the owners of the Law Firm may also own entities which have an interest in the Financial Firm. This means that any fees or commissions paid to the Financial Firm may also benefit the owners of the Law Firm.

Client acknowledges that financial products or services may be purchased from any representative licensed to do business in this state. Working with the Financial Firm or working with another company will have no bearing on the fees charged by the Law Firm for work performed in preparing Client's estate plan. The Rules of Professional Responsibility for attorneys require the Law Firm to inform Client that, before signing this agreement, Client shall have the opportunity to seek advice from an independent attorney of the Client's choosing.

If Client chooses to have the Financial Firm provide financial products or services, Client expressly waives the attorney/client privilege and any conflict of interest and permits the Law Firm to disclose any necessary financial and estate planning information in its possession to the Financial Firm.

## **6. Attorney's Fees and Costs in Action on Agreement**

The prevailing party in any action or proceeding to enforce any provision of this Agreement will be awarded reasonable attorney's fees and costs in that action or proceeding or in efforts to negotiate the matter.

## **7. File Maintenance**

During our representation of you, we will be sending you copies of all important contracts, pleadings, letters, notices, and other material that we believe you should review. Our office strives to maintain these documents in digital (paperless) format, so more often these copies shall be in digital format, for ease of retention and portability. You should have a secure place to keep these documents. If you need additional paper copies at any time, we can make those at your expense for our normal copy fees or cooperate in sending the data to the secure copy service of Client's choice. Clients may control such costs by keeping digital copies. Should you believe your particular file requires encryption, you should advise us of the form of such encryption. If our office is required to secure encryption software specifically for your case, the cost of that software shall be included in your bill.

This message informs you that the firm does not keep copies of your signed estate plan. You are responsible for safeguarding and maintaining the only signed copy of the plan in a secure location. You may scan and share a digital copy with the firm through your client portal, if you wish.

## 8. Conflicts of Interest

Clients have jointly engaged Law Firm for legal services for the both of you as a married couple, as outlined in this Legal Services Agreement. It is common for spouses to employ the same lawyer to assist them in planning their joint estates. Clients have taken this approach by asking the Law Firm to represent them both for such legal services. It is important that Clients understand that because the Law Firm will be representing them both, Clients are each considered the Law Firm's Clients.

Accordingly, matters that one Client might discuss with the Law Firm staff may be disclosed to the other Client. Ethical considerations prohibit employees of the Law Firm from agreeing with either spouse to withhold information from the other spouse. In this representation, Law Firm staff will not give legal advice to either Client or make any changes in any Client estate planning documents without Client's mutual knowledge and consent to the rendering of such advice or changes to Clients' estate plan. Of course, anything either Client discusses with Law Firm staff is privileged from disclosure to third parties.

If a conflict of interest arises between the two Clients during the course of our engagement for legal services or if the two Clients have a difference of opinion, the Law Firm can point out the pros and cons of Client's respective positions or differing opinions. However, ethical considerations prohibit Law Firm, as Clients' attorney, from advocating one Client's position over the other. Furthermore, the staff of the Law Firm would not be able to advocate one Client's positions over the other if there is a dispute at any time as to Clients' respective property rights or interests or as to other legal issues between Clients. If actual conflicts of interest do arise between the Clients of such a nature that in the judgment of the principals of the Law Firm it is impossible for the Law Firm to perform its ethical obligations to both Clients, it would become necessary for the Law Firm to withdraw as Clients' joint lawyer.

If Clients have any questions about anything discussed in this Conflict of Interest section, or if Clients are unclear or unsure about any aspects of hiring our Law Firm to represent both Clients jointly, Clients should each feel free to consult with a separate lawyer about the effect of joint representation and agreeing to these terms. By agreeing to the terms of this Legal Services Agreement, Clients both agree that the Law Firm has discussed these Conflict of Interest issues with Clients and Clients both consent to the Law Firm representing Clients jointly.

## **9. Attachments Made a Part Hereof**

- Addendum of Terms
- Exhibit A
- Exhibit B
- Privacy Notice
- Disclosure Statement
- Engagement Standards

# **Addendum of Additional Terms**

### **Billing Dispute Resolution**

Should a billing or fee payment dispute regarding the terms of this agreement ever arise which Client and Law Firm are unable to resolve by themselves, Law Firm intends to arbitrate the fee dispute using arbitrators affiliated with LOS ANGELES COUNTY BAR ASSOCIATION ATTORNEY CLIENT MEDIATION & ARBITRATION SERVICES. If Clients elect not to engage in fee arbitration through the LOS ANGELES COUNTY BAR ASSOCIATION ATTORNEY CLIENT MEDIATION & ARBITRATION SERVICE, Law Firm is free to pursue any legal means to resolve the fee dispute and collect any fees and unreimbursed costs that are due.

### **Conflicts of Interest**

In representing couples, families, and business partners in estate planning, there are often potential, as well as actual, conflicts of interest that Client must be aware of. This Addendum of Additional Terms may incorporate by reference the terms and conditions of the form entitled Conflicts of Interest Disclosure and Waiver which Client has been asked to review, approve, sign and return to Law Firm.

## **Termination of Engagement**

Upon the completion of the services contracted for hereunder, the terms of this engagement will be complete. The attorney-client relationship shall be terminated upon completion of the services contracted for hereunder and there is no ongoing attorney-client relationship nor duty to provide continuing legal services without the execution of a supplemental written agreement. Compliance with the request of a former client to receive periodic newsletters, law firm updates, seminar announcements and other promotional materials as well as periodic review reminders from the law firm shall not constitute nor is it intended to create an ongoing attorney-client relationship.

## **Asset Information**

If Client is an estate planning or long-term care planning client, Client may have received an Asset Booklet at the personal consultation. It is vitally important that Law Firm have this information in order to properly complete the estate plan or long-term care asset preservation plan. The completed Asset Booklet must be provided to Law Firm no later than two weeks before the signing date and is often provided at the Asset Inventory Meeting. *If the Law Firm does not have this information at least two weeks prior to the signing appointment, the signing appointment may need to be rescheduled, which could result in at least a one month delay for completion of the plan.* This delay may adversely affect the outcome of the plan. If Client is a long-term care planning client, this may delay qualification for benefits.

## **Transfer of Property / Funding of Estate Plan**

If this is a planning matter, Client's plan is not complete until ownership of property (real estate, securities, bank accounts, etc.) is transferred to the trust or other entity (such as a partnership, LLC or corporation) created as part of the plan. Except as otherwise provided in the agreement, Law Firm is not responsible for funding the plan. For the transfer of any out-of-state real estate, Client agrees to consult with a legal professional in the area where the property is located. If the services outlined in the agreement include the transfer of in-state real estate, Client agrees to provide Law Firm with a GRANT/ WARRANTY or QUITCLAIM deed for each piece of real estate to be transferred to the trust. Client must provide us with a copy of their complete Grant Deed (Ownership transfer documents) at least **three (3) weeks** before the Final Document Review Meeting. Client may ask that Law Firm request a copy of the deed on record from the recorder's office for an additional fee of \$75.

Client agrees to pay an additional **\$350** for each piece of in-state real estate transferred to Client Living Trust and **\$450 plus recording fees** for each piece of out-of-state real estate transferred to Client Living Trust. Client agrees that Law Firm has not been retained to verify ownership of the property and can rely on information on the deed. Client agrees that Law Firm shall not be held responsible for any damages resulting from Client's failure to transfer property to the trust or other legal entity.

## **Tax Returns**

Law Firm has NOT been retained to prepare a gift tax return (Form 709), estate tax return (Form 706) or fiduciary or business income tax return, or other tax returns. It remains Client's responsibility to assure such returns are prepared and timely filed. The preparation of most estate plans do not require the preparation of a gift tax return – however, some forms of government assistance / asset preservation planning and advanced estate planning strategies involve irrevocable transfers of assets that are characterized as gifts for federal tax purposes and such transfers can require the preparation and timely filing of a gift tax return.

## **Client Newsletters, Webinar and Client Event Invitations**

Client requests that Law Firm provide a copy of quarterly client newsletters, law firm updates, webinar announcements and other promotional materials as well as periodic review reminders. Client understands that this ongoing communication may be sent via e-mail, facsimile, U.S. mail, or other methods. Further, Client understands that this request to receive ongoing communications from Law Firm does not constitute an ongoing attorney-client relationship after the completion of the legal services contracted for hereunder. Client agrees that this request to receive ongoing communications from Law Firm does not create a duty on the part of the Law Firm to keep Client apprised of any changes in federal and state law and/or regulations. Client acknowledges responsibility to keep Law Firm apprised of any changes to contact information to continue receiving communications from the Law Firm.

## **Engagement Standards**

Client received a copy of Law Firm Engagement Standards. Client acknowledges receipt of Engagement Standards form and has read it, agrees to abide by its terms and that its contents are incorporated herein by this reference.

## **Missed Appointments**

The Law Firm understands that Client may need to change an appointment time and/or date due to unforeseen circumstances. Law firm attorneys have set aside the time to meet with Client and last-minute cancelations do not allow for this time to be effectively used. The Law Firm requests that Client provide Law Firm at least 24-hour notice of the need to cancel an appointment. There is no charge for cancelations with at least 24-hour notice. Cancelations with less than 24-hour notice are subject to a \$750.00 cancelation fee. Rescheduled appointments may cause delays of one month or more, depending on the schedules of Law Firm attorneys and team.



# Exhibit "A"

## Estate Planning: Legacy Wealth Special

### Preparation of Comprehensive Estate Plan\* Including:

Legacy Wealth Trust with

Access Trust™  Sentry Trust™  Remarriage Protection  Special Needs Trust

**Restatement of existing estate plan to a Comprehensive Estate Plan\* for a married couple including:**

Legacy Wealth Trust with

Access Trust™  Sentry Trust™  Remarriage Protection  Special Needs Trust

Staggered Distribution Trust

Probate Avoidance Trust

**Amendment of existing trust for a married couple including:**

Legacy Wealth Trust with

Access Trust™  Sentry Trust™  Remarriage Protection  Special Needs Trust

Staggered Distribution Trust

Probate Avoidance Trust

**Ancillary Documents Only:**

Preparation of \_\_\_\_ Advance Health Care Directive(s)

Preparation of \_\_\_\_ HIPAA Authorization Form(s)

Preparation of \_\_\_\_ Durable Power(s) of Attorney for Property

Preparation of Property Agreement

Preparation of \_ Stand-Alone Special Needs Trust(s) for \_\_\_\_\_

Preparation of \_\_\_\_ Will(s)

Preparation of \_\_\_\_ College Children's Package (Advance Health Care Directive, HIPAA Authorization Form, Durable Power(s) of Attorney for Property

**Other:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\* A Comprehensive Estate Plan includes a revocable living trust, pour-over will(s); power(s) of attorney for property; general assignment; property agreement (if appropriate); advance health care directive(s); HIPAA authorization form(s); and miscellaneous ancillary documents and instruction forms housed in an Estate Planning Portfolio binder.

# Exhibit “B”

I agree to pay my Attorney fees for the performance of the contracted services, consistent with the following criteria and applicable terms and conditions:

1. The time and labor required; the novelty, complexity, or difficulty of the questions involved, and the skill required to perform the services properly shall all be considered in determining the final fee;
2. The nature and extent of the responsibilities assumed by my Attorney and the results obtained. Included in this consideration are the services I perform, and the character of the asset being administered;
3. The sufficiency of assets properly available to pay for legal services, including those assets which are outside of the Trust, or the Estate, which require services to be performed by my Attorney relative to such assets;
4. Where applicable, the flat rates currently charged by my Attorney to perform any of the services contemplated by this Agreement;
5. Where applicable, the following hourly rates shall apply for the performance of any of the services contemplated by this Agreement, that are not included in the flat rate charges provided in D. above:

a. Portia M. Wood, Esq	
i. All matters, except litigation	\$750
ii. Litigation	\$550
iii. Travel Time	\$375
b. Paralegal/ Administrative Time/Hour: *	
i. Lead Paralegal	\$ 285
ii. Other Paralegals	\$ 225
iii. Administrative Team	\$ 195
iv. Travel Time	\$ 175

6. When applicable, the Court shall determine fees:

The Court, having jurisdiction over the Decedent's affairs, shall determine fees for services rendered in connection with any Court proceedings affecting the Decedent's affairs, when applicable. Such fees shall be paid immediately in the amount determined by the Court.

I further agree to reimburse all costs, expenses and funds advanced by my Attorney in performing the services required by this Agreement, including but not limited to recording fees, filing fees, title search, delivery service, telephone tolls, mileage, postage, fax expenses, word processing expenses, or any other expenses incurred by them. These costs shall be paid in the amounts actually incurred, or in lieu thereof, by reimbursement to my Attorney for these expenses at the rate of 6% of the final fee to be paid, or any combination thereof.

Court awarded fees, are due immediately upon receipt of the Court Order, unless the Order provides to the contrary.

I further understand that as to any other fees and expenses due my Attorney, payment shall be made within 15 days of the date of receipt of the billing. If these fees and costs are not paid within thirty (30) days of the billing date, interest at the rate of 12% per annum shall be due on them from the date of billing. In the event of default, it is my understanding that my Attorney will be entitled to recover all expenses associated with enforcing this payment, including but not limited to reasonable attorney fees.

WOOD LEGAL GROUP, LLP

# Privacy Notice

With the passage of the Gramm-Leach-Bliley Act, Estate Planning Attorneys, like C.P.A.s, banks, trust companies and other financial service providers, are now required to inform their Clients of their policies regarding the privacy of Client information. Attorneys have always been required under their Code of Professional Conduct to keep their Client's information confidential. Therefore, we have always protected your right to privacy. Furthermore, in order to practice before the Internal Revenue Service, we are forbidden from disclosing any Client information provided for tax planning or preparation services without your prior written consent.

## Consent To Use of E-Mail and Cloud Services

In order to provide Clients with efficient and convenient legal services, Attorney will frequently communicate and transmit documents using email. Because email continues to evolve, there may be risks communicating in this manner, including risks related to confidentiality and security. By entering into this Agreement, Clients are consenting to such email transmissions with Clients and Clients' representatives and agents.

In addition, Attorney uses a cloud computing service with servers located in a facility other than Attorney's office. Most of Attorney's electronic data, including emails and documents, are stored in this manner. By entering into this Agreement, Clients understand and consents to having communications, documents, and information pertinent to the Clients' matter stored through such a cloud-based service.

## Non-Public Information We Collect

Our engagements as estate planners require us to obtain private information about our Clients. This information is typically provided to us by you or information that we have obtained from outside sources with your authorization.

## Parties to Whom Information is Disclosed

We do not disclose the private personal information of Clients or former Clients which we have obtained in the course of our practice, except as required or permitted by law.

## Required Disclosures

As legal professionals, we are required by law to make disclosures of private information where we have knowledge of child abuse or of the intent to commit a crime.

## Permitted Disclosures

**Employees & Independent Contractors:** In order to complete work for which you have engaged our firm, your private information may need to be disclosed to employees and Independent contractors of our firm.

**Outside Providers:** On occasion, we may need to provide your private information to unrelated third parties who are assisting us in completing work for which you have engaged our firm. This information is never provided without first obtaining your written permission. Examples of third parties to whom your private information might be disclosed is an accountant assisting us with tax research or accounting services, an appraiser helping us to value your assets or a life insurance professional providing us with quotes for obtaining life insurance coverage.

## Protecting the Confidentiality and Security of Client Information

In order to better serve you and your heirs, as well as comply with certain professional guidelines and requirements, we retain records of the professional services that we provide. As part of our commitment to provide you with the finest service possible, we maintain physical, electronic and procedural safeguards to protect the private information of our Clients and former Clients. These safeguards comply with our professional standards as well as with the federal regulations.

## Request Not to Release Information

The Federal Trade Commission regulations require us to notify you that you may request that our firm not release your non-public personal information. While it is unnecessary for you to do so, because our firm does not release any private information, in the interest of satisfying the regulations we include this disclosure.

In addition, although the attorney / Client privilege by which our firm is bound prohibits us from releasing any communications between you and one of our attorneys, you can always request that our firm release such information to anyone you designate.

Should you have any further questions regarding our privacy policies and procedures, please feel free to call our office.

# Disclosure Statement as Required by the California Rules of Professional Conduct

When an Attorney represents a client, they must do so with the utmost of trust and must provide advice and counsel that is in the best interest of the client. Also, in the course of representing a client, the Attorney is allowed to view confidential client information. The viewing of confidential information may give rise for the Attorney to suggest that the client consider the purchase of a financial product like Life Insurance or Long-Term Care Insurance.

The following disclosures are required to ensure that Attorneys conduct themselves in an ethical manner whenever that Attorney renders both legal services to a client as well as non-legal services performed in their fiduciary capacity as legal counsel to the client.

The overriding purpose of these disclosures is to completely inform the client that the Attorney will receive financial compensation in the form of a sales commission should the client purchase any financial product through the Attorney or \_\_\_\_\_, to provide the client full disclosure of the terms of the transaction, to allow the client sufficient time to consider the disclosures, to instruct the client they must seek out an independent review by other legal counsel, and to give the client the opportunity to either refuse to proceed with the transaction, or to give their voluntary and informed consent to the proposed financial transaction with the Attorney.

**THE ATTORNEY HAS A DUTY TO MAKE SURE THAT THE PROVIDING OF NON-LEGAL SERVICES TO A CLIENT, WHERE THE ATTORNEY WILL RECEIVE FINANCIAL COMPENSATION, DOES NOT INTERFERE WITH THE ATTORNEY'S DUTY TO MAINTAIN CLIENT CONFIDENCES AND SECRETS AND TO MAKE SURE THAT A CLIENT KNOWS IF COMMUNICATIONS IN CONNECTION WITH THE NON-LEGAL SERVICE WILL NOT BE PRIVILEGED.**

**THE ATTORNEY HAS A DUTY TO MAKE SURE THAT THE PROVISION OF NON-LEGAL SERVICES DOES NOT COMPROMISE THE ATTORNEY'S REPRESENTATION OF THE CLIENT IN ORDER TO ADVANCE THE ATTORNEY'S OWN FINANCIAL OR PERSONAL INTERESTS.**

**THE ATTORNEY HAS A DUTY TO MAKE SURE THAT THE PROVISION OF NON-LEGAL SERVICES DOES NOT COMPROMISE THE ATTORNEY'S ABILITY TO PROVIDE UNBIASED AND INDEPENDENT JUDGEMENT ON BEHALF OF AND ADVICE TO THE CLIENT.**

In 1975, the California Rules of Professional Conduct were amended to allow Attorneys to enter into **business transactions with clients** or acquire pecuniary interest adverse to clients if a number of prerequisites, including client consent, were met. The Rules do not apply when there is no Attorney/Client Relationship in existence.

*Therefore, the disclosures illustrated herein are not required when there is no pre-existing attorney/client relationship with the client.*

Rule 1.8.1 of the California Rules of Professional Conduct states:

A lawyer shall not enter into a business transaction with a client, or knowingly acquire an ownership, possessory, security or other pecuniary interest adverse to a client, unless each of the following requirements has been satisfied:

(a) the transaction or acquisition and its terms are fair and reasonable to the client and the terms and the lawyer's role in the transaction or acquisition are fully disclosed and transmitted in writing to the client in a manner that should reasonably have been understood by the client;

(b) the client either is represented in the transaction or acquisition by an independent lawyer of the client's choice or the client is advised in writing to seek the advice of an independent lawyer of the client's choice and is given a reasonable opportunity to seek that advice; and

(c) the client thereafter provides informed written consent to the terms of the transaction or acquisition, and to the lawyer's role in it.

**Therefore, when rendering professional services that involve a fiduciary relationship, a member of the State Bar of California must conform to the professional standards of a lawyer, even if the services performed could also be rendered by someone else who is licensed in a different profession.**

# Conflicts of Interest Disclosure and Waiver (Family / Business)

Clients engaged the Law Firm for estate planning, elder law and/or other legal services, as outlined in Law Firm's Legal Services Agreement. Ethical duties normally prevent the staff of the Law Firm from disclosing any details of Clients' confidential affairs to third parties. However, it is not uncommon for family members and business partners to engage in joint transactions, such as common ownership or beneficial interests in a business or real property, investment transaction or a trust, partnership or other business entity. Representation of multiple family members or business partners in such situations require the staff of the Law Firm to share confidential information among all parties to the transaction(s). Because of these potential conflicts of interest between family members and business partners, it is important that Clients understand and consent to the representation of these persons by the Law Firm as part of Clients' engagement for legal services.

Although the mere possibility of a future conflict of interest does not prevent the Law Firm from representing multiple members of the same family or business partners, if a conflict of interest should arise in the course of a legal engagement, the Law Firm may be required to withdraw from its representation of all family members or business partners or withdraw its representation of one family member or business partner while reserving the right to continue to represent other family members, business partners or the business itself.

After considering the foregoing, please sign below if you consent to the Law Firm representing other members of Clients family or Clients' business partners. If Client has any questions about anything discussed in this Disclosure and Waiver Form, please let Law Firm know.

***I (We) have read the foregoing and understand its contents. I (We) consent to the Law Firm representing other family members or business partners on the terms and conditions set forth. I (We) understand that I (we) may withdraw this consent at any time. I (We) further understand that I (we) are entitled to hire separate legal counsel at any time, as are family members and business partners.***



# Client Engagement Standards

We created these engagement standards to explain the way our firm works. We want to make the best use of our Clients' time and resources, focusing on providing top-quality services. Please take a look at what you can expect from us, and what we will expect from you in return.

## How Our Firm Works and What You Can Expect From Us

Our goal is not only to meet your expectations, but to exceed them. Developing life-long Clients is our focus. Please let us know if we are not meeting your expectations at any time.

- We know that your time is valuable and important. We will always do our best to be on time for our scheduled appointments. We will never waste your time by over-scheduling our calendar.
- Our Clients consistently complement our professional and courteous staff. We promise our Clients the upmost respect, and we expect the same courtesy in return.
- We strive to get your questions answered quickly and correctly. When you call our office, you will first be directed to one our paralegals, who can often answer your question efficiently and fully. We respect your time and your need to know information quickly rather than waiting hours for an attorney to call back.
- Our firm understands that getting answers to questions and concerns is a vital part of feeling like a valued Client, so we will answer all calls and emails within 2 business days of your inquiry.
- We take our Clients' privacy very seriously, so you can trust that we will always keep your personal information strictly confidential.

Because we routinely exceed our Clients' expectations, they love to refer friends and family members who might also benefit from our services. Once you have experienced our high level of Client service, we look forward to treating your friends and family with the same professionalism.

Once you are our Client, we consider you to be a member of our extended Law Firm family. That means you can expect to hear from us as we continue to follow-up with you to ensure that your needs are always met. We will also send you periodic emails and newsletters, including information regarding changes in the law and invitations to seminars on a variety of estate planning topics.

# How Our Clients Benefit Most From Our Firm and What We Expect From You

- Our professional and supportive staff is always ready to help you with your questions and concerns. We ask that you are as respectful and courteous in dealing with our staff as they are with you.
- We value our time just as you value yours, so please arrive promptly for all scheduled appointments.
- In the event that Clients need to reschedule an appointment, we are more than happy to accommodate those requests provided that we are given at least 24 hour notice. Depending upon the circumstances of your cancellation, rescheduling an appointment less than 24 hours in advance may result in a cancellation fee of \$750.
- Keeping Client records up-to-date allows us to contact you when necessary. Please let us know your home address, email address or other contact information changes.
- Similarly, as your life circumstances change, please notify us. For example, if you have a child that marries, a new baby, a death in the family or a significant change in financial circumstances, give us an update so that we can ensure your plan continues to accomplish what's most important to you and your family.
- We strive to meet and exceed your expectations in every way. If we are ever missing the mark on meeting your needs, please let us know. We are always interested in your thoughts on our service.
- Our Clients consistently refer family and friends to our firm when it becomes obvious that those they care about need to look after the same important matters they have addressed.
- If you are web savvy and feel comfortable posting your review online, we would love to see your feedback on our Facebook Fan Page, the attorney review website Avvo.com, our Law Firm "Google Places Page," and other online ratings services.
- In order to provide the best service to our scheduled Clients, we do not accept walk-in or same day appointments. We want to work with you without being interrupted. If you wish to meet with a member of our staff, either an attorney or a paralegal, please make an appointment at least 24 hours in advance. If you have an emergency, let us know and we will do our best to accommodate you.

Our Clients are members of our extended family, so we treat them like VIP's. We hope that you will feel that same level of dedication and professionalism from everyone on our staff. When you do, the highest compliment that you can provide is a referral to a family member or friend. We rely on you to help us grow and strengthen our practice.