

HOW OUR LAW PRACTICE IS DIFFERENT



We're not your traditional law firm. Explaining to you how we're different requires an explanation of what the "traditional" experience with a lawyer is like. If you've worked with a lawyer to prepare estate planning documents for you in the past, this will sound familiar.

During the traditional experience, you meet with a lawyer who will often make things seem very complicated and confusing. You'll have a good idea that the lawyer is smart and seems to know what she's doing, so you'll nod and answer questions, as if you understand everything. Because you want to do the right thing for your family, you'll have the lawyer prepare document for you and you'll sign the documents, feeling relieved that you've got that taken care of.

You'll take your fancy planning binder home, stick it on a shelf or in a drawer, mark estate planning off on your checklist as DONE and never think about it again.

You might remember your lawyer said something about moving your bank accounts into the trust. So you'll go to the bank, forget what you were supposed to do, call your lawyer's office, get a voicemail, have to leave the bank and wait for a call back, (which takes several hours at least and sometimes days) and by that time, you'll have gotten busy with other things and never get around to moving that bank account.

A few weeks later, you'll get a bill in the mail for \$67.50 for 15 minutes of your lawyer's time for answering a couple of questions. You'll make a mental note – *don't call the lawyer ever again*.

Several years later, you'll refinance your house or sell it and buy a new one and forget that you were supposed to let your lawyer know or make sure you kept the title in the name of the trust.

You'll hear something about a change in the tax law, but you figure you'd surely get a letter in the mail from your lawyer if it was something that affected you, so you don't worry about it. And besides, its been so long since you talked to her you can't even remember her name, let alone know where to find her contact information. So you put it off.

It's not until you become incapacitated or die and your family finds the binder that you made years before and never looked at again, that it becomes known that your plan is so outdated that it has nothing to do with your life, your assets, and the law.

Your family is at a total loss. They don't know where to turn or what to do next, so they contact the same lawyer you used to prepare the documents, who is happy to probate your assets, which never made it into your trust. Her bonus is coming early this year. Probate is often joked about in the legal community as "the lawyer's retirement fund" for a reason.

How do I know all this?

Because it happened to my family and I swore it would never happen to my clients when I became a lawyer.

Our Firm Helps You Prepare For Life

What makes our firm different is our philosophy of continual guidance. You want to know that you've made the best decisions for your family and that your plan will work when your loved ones need it most.

That's our focus too. We will help you make sure your plan continues to work throughout your lifetime. We encourage communication with our clients. In fact, we've thrown out the time clocks so you never have to be afraid to call with a quick question (or even a not-so-quick question). Everything we do is billed on a flat-fee basis and agreed to in advance, so there are never any surprises.

We have a team to serve you. When you call our office to ask your quick question, you won't have to wait hours or days for a phone call back. You'll get an immediate answer. And, if you need to schedule an in-depth legal or strategic call with your lawyer, we'll schedule a call when we're both available to avoid wasting your time by playing phone-tag. We'll also never bill you for a phone call.

Unlike other law offices, we look at the creation of your plan as the starting point instead of the finish line of our relationship. If you are looking for an impersonal transaction, then I politely encourage you to look elsewhere. If you are looking for something greater, then I welcome the opportunity to get to know you better.