



NESBITT LAW  
— PLLC —

## NEW CLIENT INFORMATION - ESTATE PLANNING

**Overview.** Nesbitt Law PLLC is a boutique law firm that serves individuals, families, and entities in creating, maintaining and growing legacies. We specialize in estate planning, estate administration, and non-profit representation. We purposely concentrate the practice to these specific areas to provide the highest level of expertise and service to our clients.

**Initial Contact.** Once we have connected, we will send you our Questionnaires and the New Client Information document you are reading. The next step will be to schedule an Initial Meeting with one of our attorneys. We have specific days and times that we reserve for meetings, but we will be flexible as needed. We would appreciate you returning the completed Questionnaires and other information to us prior to our Initial Meeting.

**Initial Meeting.** At the Initial Meeting, we will review your particular situation and the information that you have provided. The goal of the Initial Meeting is to review and formulate the next steps on how to move forward with your estate plan and accomplish your objectives. Please note we do not provide free consultations. The attorney will charge for his or her time during the Initial Meeting consistent with our billing practices outlined below. The Initial Meeting is not only for introductions, but to accomplish significant work on your behalf. Hopefully, you have been referred by a trusted advisor or friend who has given you our background. For additional introductory information, please visit our website ([nesbittlawpllc.com](http://nesbittlawpllc.com)).

**After the Initial Meeting.** We will follow-up after the Initial Meeting with a communication outlining next steps and the proposal for work to be completed on your behalf. With this communication, we will include a fee estimate and our Engagement Letter, which will include more detail on our relationship.

**Billing Practices.** Our fees generally will be based upon the reasonable value of services rendered as determined in accordance with our billing rates. Currently, Andrew Nesbitt's hourly rate is \$300 and the hourly rate for Sabrina O'Hare is \$225. Our legal assistant hourly rates range from \$125-\$150 per hour. We keep accurate records of all of the time we devote to your matter, including meetings, telephone calls, email correspondence, research, and communication with advisors. As noted, we do not provide free consultations. However, after the Initial Meeting, a fee estimate will be provided, which will include the time spent during the Initial Meeting. If you decide not to work with us or if we do not hear from you within 30 days of our communication after the Initial Meeting, we will close your file and invoice you for the Initial Meeting.

**Communication Expectations and Timing.** We strive to provide timely communication with our clients and a timely work product. To that end we have three main internal timing goals for our Estate Planning clients: (1) return email and telephone messages within two business days; (2) send communication after the Initial Meeting within two weeks; and (3) prepare documents within four weeks of receipt of a signed Engagement Letter and receipt of all of the information required for drafting. These time frames can be adjusted if we are notified in advance.

**Confidentiality.** At the Initial Meeting the attorney-client confidentiality privilege attaches to protect the confidentiality of your communications with us. We will always inquire if you are comfortable if other meeting attendees (i.e. family members or financial advisors) are present that may waive that confidentiality. The firm is intentionally small in order to maximize the privacy of our clients.

**Conflict of Interest.** Prior to the Initial Meeting we undertake reasonable and customary efforts to determine whether there are any potential conflicts that would disqualify us from representing you.

**Conclusion.** Please let us know if you have any questions once you have reviewed this document. Hopefully, this document answers some initial questions so that we can get to work and focus on you and your estate planning. We look forward to a mutually beneficial relationship.