



NESBITT LAW
— PLLC —

NEW CLIENT INFORMATION - ESTATE ADMINISTRATION

Overview. Nesbitt Law PLLC is a boutique law firm dedicated to helping individuals, families, and entities create, maintain, and grow legacies. We specialize in estate planning and estate administration. We purposely concentrate the practice to these specific areas to provide the highest level of expertise and service to our clients.

Initial Meeting. At the Initial Meeting, we will review any Estate planning documents and asset information related to the deceased. Please bring any documentation you have regarding the deceased's bank accounts (individual and joint), brokerage accounts, retirement accounts, life insurance policies, business interests, automobiles, and real estate. The goal of the Initial Meeting is to review and formulate the next steps on how to efficiently move forward with the Estate Administration process. Please note we do not provide free consultations. The attorney or legal assistant 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 behalf of the Estate. 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).

After the Initial Meeting. We will follow-up after the Initial Meeting with a communication outlining next steps and our Engagement Letter, which will include more detail on our relationship.

Billing Practices. Our fees are based on the reasonable value of services rendered in accordance with our billing rates. Andrew Nesbitt's hourly rate is \$475. Our legal assistant rates range from \$175 to \$250 per hour. We maintain detailed records of the time devoted to your matter, including meetings, telephone calls, email correspondence, research, and communications with advisors. If you choose not to proceed with our firm, you will only be responsible for the Initial Meeting invoice, and we will close your file. Because each estate is unique, we cannot provide firm fee ranges for administration work. Please note that when attorney fees are paid from the deceased's estate, all fees must be reviewed and approved by the Clerk of Court before the estate can be closed.

Confidentiality. At the Initial Meeting the attorney-client confidentiality privilege attaches to protect the confidentiality of your communications with us. We will 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 to maximize the privacy of our clients.

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

Conclusion. We hope this overview answers your initial questions and provides a clear sense of our process. Please reach out with any additional questions so we can begin focusing on your estate planning needs. We look forward to working with you.

Please note: We are only able to provide estate administration services for decedents who were residents of North Carolina.