



NESBITT LAW  
— PLLC —

## NEW CLIENT INFORMATION - ESTATE ADMINISTRATION

**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 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](http://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 generally will be based upon the reasonable value of services rendered as determined in accordance with our billing rates. Andrew Nesbitt's hourly rate is \$350. Our legal assistant hourly rate is \$175 per hour. Legal assistants complete most of the Estate Administration work under the supervision of an attorney. We keep records of the time we devote to your matter, including meetings, telephone calls, email correspondence, research, and communication with advisors. 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. We are not able to provide firm fee ranges for Estate Administration work due to the varying nature of each case, but please note that if attorney fees are paid from the deceased's Estate, the Clerk of Court must approve all attorney fees before closing the Estate.

**Communication Expectations and Timing.** We strive to provide timely communication with our clients and a timely work product. We have three main internal timing goals for our Estate Administration 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 according to Court deadlines after receipt of a signed Engagement Letter and receipt of all of the information required for the filings. 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 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.** Please let us know if you have questions once you have reviewed this document. Hopefully, this document answers some initial questions so we can get to work and focus on the Estate Administration for your family member or friend. We look forward to a mutually beneficial relationship.