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 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 Contact. Once we have connected, we will send you to our website to obtain the Questionnaires and the New Client Information document you are reading. The next step will be to schedule an Initial Meeting with our attorney, Andrew, utilizing our online calendaring system. We have specific days and times we reserve for meetings, but we will be flexible as needed. We would appreciate you returning the completed Questionnaires and other information to us before our Initial Meeting.

Initial Meeting. At the Initial Meeting, we will review your particular situation and the information you have provided. The goal of the Initial Meeting is to review and formulate the next steps on moving forward with your estate plan and accomplish your objectives. Please note we do not provide free consultations. Andrew will charge for his 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).

After the Initial Meeting. We will follow-up after the Initial Meeting with a communication outlining next steps and (if applicable) a proposal for work to be completed on your behalf. With this communication, we typically will include a fee estimate and our Engagement Letter. After we receive the signed Engagement Letter and the information required for drafting, you will have the opportunity to schedule a time to execute the documents. You will receive draft documents to review several days before your appointment.

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 $125-$175 per hour. We keep records 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.

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. 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 you and your estate planning. We look forward to a mutually beneficial relationship.

Please note we are only able to prepare estate planning documents for residents of North Carolina.

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