Nesbitt Law
PLLC

# NEW CLIENT INFORMATION – ESTATE PLANNING

**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 Contact.** Once we connect, you will be directed to our website to access our Questionnaires and this New Client Information document. The next step is to schedule an Initial Meeting with our attorney, Andrew Nesbitt, through our online calendaring system. While we reserve specific times for client meetings, we are flexible when needed. We ask that you complete and return the Questionnaires and related information before your Initial Meeting.

**Initial Meeting.** At the Initial Meeting, we will review your particular situation and the information you have provided. The purpose of this meeting is to review and formulate the next steps toward building or updating your estate plan. 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.** Following the Initial Meeting, we will provide you with a summary of next steps, our Engagement Letter, and a fee estimate. This communication will also include an invoice for the Initial Meeting, which is applied toward the overall fee estimate. Once we receive the signed Engagement Letter, payment for the Initial Meeting, and all required information for drafting, you will have the opportunity to schedule a time to execute the documents. You will receive draft documents to review prior to your appointment.

**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. We do not require a retainer. After the Initial Meeting, you will receive an invoice for that time, payable upon returning the Engagement Letter. 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.

**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 prepare estate planning documents for residents of North Carolina.