



## **RAVEN LAW OFFICE, PLLC**

Welcome and thank you for choosing Raven Law Office, PLLC! Please review this letter to help you learn what you can expect from our office.

### **Appointments**

You can expect your first appointment to last approximately one hour. Please arrive on time, so we can fully utilize your appointment to determine your specific goals and develop the estate plan that works for you.

We appreciate clients may need to reschedule appointments due to an unforeseen circumstance. We reserve the right to forego rescheduling a potential client who fails to contact the office at least 24 hours prior to the scheduled appointment time. If a potential client cancels (or reschedules less than 24 hours prior to the appointment time) twice, we reserve the right to decline the free initial consultation and apply our standard hourly rate.

We do not charge for your first estate plan appointment (up to 1 hour for an in-person meeting and up to a ½ hour for a telephone conference). If your appointment exceeds these time increments, our hourly rates may apply.

### **Payments**

Each client's circumstances are unique, so we do not quote fees prior to meeting with you. Estate plans are typically done on a flat fee basis and you will receive a quote at your first appointment. If you elect to proceed with an estate plan, we request ½ of the quoted fee at your first appointment. The balance of your fee will be due at your signing appointment. For your convenience, we accept cash, checks, and credit cards. Due to service fees, cash or checks are preferred.

Unless requested, or overdue, we typically do not send invoices for estate plans. If you would like an invoice, we will certainly make your invoice available. Our billing cycle ends on the 15<sup>th</sup> of each month.

### **Confidentiality**

We appreciate you may wish to include family members in your appointment. However, bringing third parties to your appointment may negate attorney-client privilege. For your protection, we reserve the right to meet with you privately.

We are bound by attorney-client privilege -- any information you share with us remains private. In fact, to help ensure your privacy and maintain confidentiality, we offer a secure client portal to communicate with clients, share documents, and post invoices. We will request your e-mail address to invite you to this secure client portal. Whenever possible, communications and document sharing should funnel through the secure portal. If you opt out of the client portal, you agree to hold Raven Law Office, PLLC harmless for any privileged or otherwise confidential information intercepted or viewed by third parties with an unsecured e-mail system.