

THE SKETCHLEY LAW FIRM, P. A.

NEW CLIENT PACKET

Thank you for giving The Sketchley Law Firm, P.A. the opportunity to assist you at this time. Enclosed please find the following items for your information.

1. A copy of your signed Fee Agreement
2. Office Hours and Contact Information
3. Peace of Mind Program Benefits
4. Our Telephone Policy
5. Our Electronic Communication Policies
6. Taking Control of Your Costs
7. Your Expectations
8. Any original documents provided at the initial meeting
(copies have been made for our file)

After you have reviewed these materials, if you have any questions or need assistance, please call us at your nearest convenience.

You can follow The Sketchley Law Firm online:



Website: <http://www.sketchleylaw.com>



Facebook: <https://www.facebook.com/sketchleylaw>



Twitter: [@TLHElderlaw](https://twitter.com/TLHElderlaw)



Blog: <http://elderlawissues.blogspot.com/>

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Peace of Mind Program Benefits - Elder Care Maintenance

Congratulations, you are now a member of The Sketchley Law Firm's exclusive Peace of Mind Program for Elder Care Maintenance. Our Peace of Mind Program offers a variety of benefits to fiduciaries, caregivers and care groups. Below is a comprehensive list of benefits we offer under the Program:

- One (1) annual one-hour attorney consultation at beginning of the fiscal year with care group to discuss changes, updates, etc.
- One (1) additional annual one-hour crisis meeting to discuss issues the care group may be facing.
- Up to two (2) additional attorney/paralegal hours to address issues that may arise.
- One (1) preliminary one-half (1/2) hour family probate meeting when a member of the care group dies.
- Peace of Mind Organizer containing important information (as determined by The Sketchley Law Firm), including password-protected electronic copies of advance directives, powers of attorney, and trusts (provided by Client) on a USB drive.
- Annual review of beneficiary designations for retirement assets and life insurance.
- Standard letters of instruction to Client, caregivers, and fiduciary agents.
- Standard form letter examples for caregivers to providers.

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- Annual Fiduciary Review and recommendations.
- Member-exclusive Peace of Mind Program quarterly newsletter of elder law updates, scam alerts, and news of interest.
- Invitation to annual member-exclusive teleseminar on important developments in the law affecting your care plan.
- Invitation to annual member-exclusive open house at The Sketchley Law Firm.
- 10% discount on estate planning services for up to three members of the care group (limited to new estate planning clients only, restrictions apply in compliance with the Rules Regulating the Florida Bar).

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Telephone Policy

Office telephones are answered during regular business hours. No staff or attorney cell phone numbers will be provided to clients. A voice mail system is available for messages after hours or when we are unable to answer the telephone during business hours. You are entitled to make reasonable requests for information concerning your case. To accommodate your need for information, we have instituted the following telephone policy:

1. When you call the office, please identify yourself and your case. If it is a routine question such as the time of a hearing, whether you must be present or what a term on a form means, please ask the administrative assistant or paralegal for the answer. All scheduling questions must be directed to assistants and paralegals because they keep the calendar.
2. When an attorney or staff member is unavailable, please leave a message. If we are unable to answer, leave a message on the voicemail or we do not know you called. Your message is given to the individual you are trying to reach as soon as they are available and will be returned as soon as possible. Please do not leave multiple messages for the same question unless there is a change in the status or your contact information. If your question requires more detailed discussion, our staff may arrange a telephone conference.
3. In the event of a true emergency occurring after hours, our voicemail system has a direct call to attorney home feature. This will allow us to assist you in the event you have a true emergency after hours. If a non-emergency message is left on our emergency system, your message will be returned the following business day. To honor our attorneys' and staff members' privacy, please do not call them at their homes or on their cellular phones.
4. Non-emergency messages left on the voicemail system after hours will be returned the first business day following your message.
5. For all telephone calls and consultations you will be billed in the same way you would be billed if were discussing the case in our office with a legal assistant or attorney. If your call is merely to replace previously provided written information, make the request to a legal assistant and you will not be charged for a call requesting an extra copy of that information if that is the only reason for your call.

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Electronic Communication Policies

E-Mail Service of Documents

We now offer our clients the option of receiving delivery of copies of documents from our office electronically. If you elect to receive electronic (e-mail) service, you will not receive paper copies of documents, including court pleadings/filings, from our office unless otherwise specified or unless required by Florida law. You may continue to receive certain items from our office by U.S. Mail at our discretion and determination (these may include but are not limited to notification of due dates, certain correspondence, or other items that require action on your part).

If electronic service interests you, please request an Acceptance of Electronic Service from our office staff. Once we receive an executed Acceptance, we will begin providing electronic service/delivery at the e-mail address you specify, pursuant to the terms of the Acceptance.

E-Mail Policy

Because e-mail is not a secure or reliable form of communication, we do not require our staff or attorneys to communicate with clients via e-mail. If the individual staff member or attorney chooses communication via e-mail, the following policies apply:

1. All e-mails are treated for file management, billing and responsive purposes as written communications. In other words, your e-mails and any responses will be printed and placed in your file and the staff member or attorney will bill for your e-mail correspondence in the same way they bill for written correspondence.
2. E-mails cannot be responded to instantly and some may not be answered for several days. Please do not expect an immediate response and do not send multiple e-mails regarding the same question. You will be billed for multiple e-mails accordingly.
3. E-mails sent outside business hours will not be received until the next business day after the e-mail was sent. We do not require staff or attorney to respond to e-mail outside business hours.

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4. E-mails are not a secure form of communication and we cannot guarantee that they will not be exposed to viruses, security breaches or other problems that plague electronic communication. You send and receive e-mail with our firm at your own risk.
5. We cannot guarantee that we will receive your e-mails or that you will receive ours. There are many reasons why e-mails are blocked by systems or just lost. If our firm experiences consistent email problems with you and/or your email address, we may require communication by mail or fax instead.
6. Never transmit secure information such as social security numbers, credit card information and/or financial information via e-mail. There is no guarantee that the information sent will remain secure at all times.
7. Finally, if you are going to communicate with our staff members and attorneys via e-mail, remember that these are professional and business addresses. Do not send spam or mass e-mail to these addresses. Do not add these addresses to your general “joke” e-mail list. If our staff members’ or attorneys’ e-mail addresses receive spam, mass and/or “joke” e-mail, our system may block all other e-mails from the offending address to protect our network, which means you will be unable to communicate via email.

If you would like to communicate with an attorney or staff member via e-mail, please ask if they would prefer that form of communication. If you attempt to communicate with them without first obtaining their permission, they may not respond due to security concerns associated with unsolicited email or emails received without permission. Do not be offended if our attorneys or staff would prefer a more secure and reliable form of communication with you.

Text Messaging (SMS/MMS) Policy

Pursuant to our Telephone Policy, no staff or attorney cell phone numbers will be provided to clients. This includes text messaging. Because text messaging is not a secure or reliable form of communication, we do not communicate with clients via text messages. Text messages received by our attorneys or office staff will not be responded to due to security concerns.

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Our attorneys and office staff will not send text messages to clients for any reason. If you receive a text message that you believe was sent from our office, please contact us immediately by telephone.

Please do not be offended that our attorneys and staff prefer a more secure and reliable form of communication with you.

If you ever feel we are not living up to these policies, please let us know.

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Taking Control of Your Costs

We strive to provide quality legal work, sound legal advice and a pleasant atmosphere. Often going through this difficult period can be emotionally and financially challenging. Therefore, we offer the following suggestions that can help you control some of the fees and costs associated with your case:

Make Your Own Copies

Although we are willing to make copies, the time and costs are passed on to you. Making your own copies at an office supply store or at home can create significant savings.

Organize Your Copies

Although we are happy to assist you in organizing the documents and copies necessary for your case, those costs are passed on to you. When we ask for documents, they should be organized according to the list you have been given. If you have been provided face sheets or dividers, organize the documents according to those face sheets or dividers. If you have not been given a list or face sheet, then items should be organized according to date. If you are providing documents in response to discovery, organize the documents according to each response.

Provide Complete Copies

Documentation is required to be complete. A great deal of time can be spent looking through incomplete documentation and having to follow up to complete those items. For example, if bank statements are requested and there are three pages to the statement, be sure to include all three pages, even a blank page. Repetitive requests for the same information leads to additional billing.

Neatness Counts

As you already know, there are many documents to be prepared and forms to be completed in your case. Your assistance in completing these forms is essential. Although no one has perfect penmanship, legible handwriting reduces your costs. Writing that is difficult to read will take more time to decipher, which increases the amount of billable time spent on your case.

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Handling Procedural Questions

Legal Assistants are available to answer general and procedural questions, provide you with a case status and scheduling information, and assist in completing paperwork. They are less expensive than obtaining this help or assistance from the attorney. However, legal assistants cannot provide legal advice or answer legal questions. If your questions are of a legal nature, they will be referred to the attorney.

Handling Legal Questions

If your questions are of a legal nature or are such that the legal assistants cannot answer them, our attorneys want to be available to answer your questions. To receive answers in the most economical manner, it may be best to group any non-emergency questions and schedule a telephone conference. Often the attorney may not be able to immediately return a call due to being in client meetings, trial, mediation, hearings, and/or depositions. A scheduled telephone appointment avoids the frustration of “phone tag” and allows the attorney to provide you with her undivided attention.

Schedule All Office Visits

We ask that clients call ahead prior to picking up or dropping off documents or coming by with questions. This will ensure that a legal assistant working with your case will be available. Additionally, it will allow you to receive his/her undivided attention.

Continue to Provide Current Contact Information

We want to keep you informed about your case at all times. If mail is returned due to an incorrect address, time is lost and the cost to resend the item is passed on to you. Much of the information is time-sensitive and can include important deadlines for which you will need as much notice as possible to prepare. Please notify our office immediately of any changes of your current home, work and/or cellular telephone numbers, e-mail, address and/or fax number. If we cannot reach you, all questions have to be handled via mail and that increases your costs.

Accept E-mail Service

As with copy and facsimile costs, time and costs associated with mailing and postage are passed on to you. If you are interested in receiving e-mail service of documents, letters, court filings and other papers and pleadings, please call our office to obtain an Acceptance of Electronic Service. If you receive electronic-only service of papers and pleadings, nothing will be physically mailed to you unless we determine it necessary or you specifically request it, which can reduce your postage and copy costs significantly.

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Your Expectations

Mistakes

Do not think we are perfect. Do not think the courts or clerks are perfect. Do not think that government agencies and personnel are perfect. Mistakes occur in the system despite everyone's best efforts.

We are competent attorneys, but we make mistakes. We will correct a mistake if we find it or if you point it out. Please do not yell at us, accuse us of not doing our job, or insult us over a mistake. We reserve the right to terminate representation of clients who act inappropriately.

If you believe you have found a mistake made by a court, a clerk, government agency or employee in your case, politely bring it to our attention. Do not call the court, clerk, government agency or employee directly. Do not yell at them or us. Do not accuse us of not doing our job or otherwise insult us over the mistake. To the best of our ability, we will provide you with an explanation of the issue and, if possible, make efforts to have the mistake corrected.

Access to the Attorney

We are unavailable on weekends or holidays so our employees can spend time with their families. Attorneys work by appointments only and only during business hours. Please do not show up at our offices to speak with an attorney without an appointment. Do not show up at our office on Friday. We are closed to the public on Friday so we can work on cases, including yours, and unexpected visits delay necessary work and never result in access to the attorney.

Leaving Messages

Throughout your legal proceeding or experience, you will become frustrated and upset and want an immediate response to your concerns. You may call our office for information or confirmation of your concerns (please see our Telephone Policy included in this packet). When you call our office, please leave a message. We are good at our job, but we cannot read minds. If you do not leave a message, we do not know you called. Accusing us of failing to communicate with you or failing to return calls when you do not leave messages is inappropriate client conduct and only causes friction between you and our office when we are doing our best to assist you. This also makes it more difficult and more expensive to assist you because we will be required to reduce all

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contact with you to writing to avoid accusations and allegations that you may make in the heat of frustration.

Advice from Friends, Family and the Internet

Most of the research you do about your case online or the advice you get from friends or family will be incorrect or not applicable to your case, so you should not compare what is happening on your case to what you find online or what friends or family may tell you. As your attorneys, we are the only reliable source of information regarding the process and status of your case. Take no action based on information from friends, family or the internet. The actions you take based on that information will likely result in additional work for us and that only increases your legal bills and may lead to us withdrawing as your attorney. If you are confused or concerned, we are happy to discuss the issue with you.

Court, Judicial or Administrative Proceedings

We cannot control the court's schedule, calendar or docket. Courts schedule cases as they are processed and in line with the thousands of other cases filed. You will not be happy with the time it takes your case to get through the system so please do not expect to be. There are thousands of cases filed in your county each year and if your case is contested in any way it can take months and even years to finish.

If you are involved in a contested case, the opposing attorney may be very aggravating and frustrating to you because he or she may accuse you of things you have not done, may be litigious (wanting to fight about everything), may work to delay calls, or may be non-responsive to requests from this office. It is unrealistic to expect that we can control how an opposing attorney handles his/her file or practices law. Venting your frustration over the opposing attorney's behavior on our office does not remedy the opposing attorney's behavior. The only thing it does do is increase your legal bill.

Filing Fees and Court Costs

To begin a case or file certain documents or pleadings within an open case, courts require parties to pay filing fees. Sometimes these fees are hundreds or even thousands of dollars and our firm requires the parties to pay these fees. We do not pay court filing fees, even in cases we handle on a pro bono basis. We will notify you of these filing fees in advance and provide you with direction for paying those fees either directly to the court or by providing our firm with a cost deposit in advance of the particular filing that will be held in your client trust account until the filing fee is paid. If a particular document or pleading requires a filing fee and you do not provide it, we will be unable to file the

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document or pleading. There are NO exceptions to this rule. If you are considered indigent by the court and an applicable statute or rule waives a fee, we will provide you with the information or documents for applying for that waiver upon request.

Other costs are also incurred in legal proceedings. Standard costs such as regular mailing and photocopies done in the regular course of business are usually billed to you as part of your periodic billing. However, larger costs such court reporter fees, transcript charges, publication of notices in a newspaper, the costs of having someone served with process, expert witness fees and investigative fees must be paid by the client. There are NO exceptions to this rule. Our office will provide you with an estimate of the particular cost. You will either be asked to provide a cost deposit for the estimated amount which will be held in your client trust account until such time as the payment must be made or introduced to the particular provider (such as an investigator) so that you can retain and pay the provider directly. If you retain a provider, you are responsible for directing them to provide us with their information or reports.