



PRIVETTE LEGACY PLANNING
WELCOME

APPOINTMENTS

We see our clients by appointment only. This ensures that we are available and can provide you with the time and attention you deserve. If you drop by unexpectedly, we cannot guarantee our availability.

If you have documents to drop off at a time when no one is available, please place them in the black box on the outside of our office door. Make sure any documents you leave in the box are clearly marked.

Our normal office hours are 9:00 to 5:00 (Monday-Thursday) and 9:00 to 3:00 (Friday). We are also available to meet with you after-hours or on weekends for an additional charge. We can also make arrangements to have the attorney travel to you for your appointment.

Please call the office if you will be late or need to cancel or reschedule your appointment.

PHONE CALLS

We welcome your phone calls. Nevertheless, the work we do requires we give our full attention to the legal matter at hand. As such, your attorney may be in the office yet unable to take your call personally. Therefore, we ask your cooperation in giving our support staff an idea as to the nature of your call. Often the firm's support staff will be able to answer fully your questions or address your needs. However, please be sure you only request legal advice from your attorney.

The firm's support staff is available on a part-time basis, and the attorney is often in meetings with other clients or handling matters at court. Therefore, a voice mail system is available for your convenience. Please leave a message—otherwise we do not know you have called. Your call will likely be returned by a member of our support staff. If your question requires a detailed discussion with the attorney, our support staff will arrange a telephone conference.

We make every effort to return voice mails by close of the next business day. In many cases, you are likely to receive a quicker response to your question if you reach out via email.

YOUR CASE FILE

This law firm is a paperless law firm in that we do not keep hard copies of your file. All incoming documents and court filings are scanned to the computer and shared with you at the time of receipt. Therefore, upon the termination or conclusion of your case, you will not receive a hard copy of the case file.

If there are originals of particular documents you want returned to you, please let us know prior to the conclusion of your case.

OBLIGATIONS FOR DISCLOSURE, COMMUNICATIONS & CONFIDENTIALITY

(See Attached Privacy Policy Notice)

Disclosure

Estate administration is an important and highly personal matter. Administering the estate of a deceased loved one often requires you disclose information to the firm about your loved one's relationships and financial affairs that you likely consider highly confidential. Nevertheless, we urge you to make a complete disclosure of all financial matters as a failure to do so would make it impossible for the firm to give you proper advice as the legal representative for the estate. This engagement is predicated on your agreement to provide the firm with all necessary factual information and materials. The firm cannot be responsible for undesired consequences caused by your failure to disclose pertinent information.

Communications

It is imperative that we be able to contact you throughout our representation of you in this matter. Therefore, please let the firm know if your contact information changes or if you will be unavailable for an extended period of time.

Please be aware that communications by e-mail may not be secure. The firm cannot guarantee that your e-mails will not be exposed to viruses, security breaches, or other problems that plague electronic communication. We cannot guarantee that we will receive your e-mails or that you will receive ours. Never transmit secure information such as social security numbers, credit card information, or other private information via e-mail. Our office can provide you with access to a secure client portal for the exchange of sensitive information.

If you do choose to communicate with us via e-mail, send a courtesy copy (cc:) of any e-mail you send to the attorney to our support staff at admin@leavealegacync.com as well. This will facilitate the handling of your case and allow the firm to be more efficient and effective in addressing your needs, please. Generally, e-mails will be answered only during business hours. If you send an e-mail in the evening or over the weekend, the earliest you can expect to receive a response is the next business day.

Because text messaging is not a secure or reliable form of communication, we do not communicate with clients via text messages. In addition, no staff or attorney cell phone numbers will be provided to clients. Text messages received by our attorneys or office staff will not be responded to due to security concerns. If you receive a text message that you believe was sent from our office, please contact us immediately by telephone or e-mail.

Confidentiality

The Professional Ethics rules require the attorney to keep all information that you disclose confidential and to not disclose it to persons outside the law firm without your permission. If other professionals not employed by this law firm are working with us on the trust or estate administration with your permission (such as your accountant, a bank trust officer, an insurance agent, a realtor, etc.), then you agree that the firm may disclose information to them as necessary to allow them to fulfill their role in your case.

CONNECT WITH US!

The firm maintains a social media presence on Facebook and Instagram. The attorney is also active on Twitter. We would love to connect with you! Our social media handles are:

Facebook: @privetteplanning

Instagram: @leavealegacync

Twitter: @amyprivlaw



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PRIVACY POLICY NOTICE

Attorneys, like other professionals who advise on personal financial matters, are required by federal law to inform their clients of their policies regarding the privacy of client information. Attorneys have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by federal law. Therefore, we have always protected our client's right to privacy.

In the course of providing our clients with legal advice, we sometimes receive significant personal financial information from our clients. As a client of **PRIVETTE LEGACY PLANNING**, you should know that all information we receive from you is held in confidence and is not released to people outside the firm, except as agreed to by you, or as required under applicable law.

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your non-public personal information, be assured that we maintain physical, electronic, and procedural safeguards that comply with our professional standards.