



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.

THE FOUR C'S

All meetings with the attorney are protected by ethical rules of confidentiality. If you are a client (and not just prospective client) of the firm, then communications with the attorney are protected by attorney-client privilege. The moment you bring in a third party (such as a family member) into the meeting, however, that privilege is gone, and the confidentiality rules are no longer applicable. This is one of the reasons why, if you have family or friends accompany you to your appointment, we will ask your companion to remain in the reception area for a portion—or perhaps the entirety of—your appointment.

Confidentiality is one of the **4 C's**. The 4 C's are ethical rules our attorney must follow in working with you. The other C's are: competency, client identification, and conflicts of interest. These rules are for your protection and assist the attorney in making sure a proper foundation exists for you to be able to execute your legal documents. If that foundation is not met, your documents could be challenged later by an unhappy heir. So, it is vital that the attorney have one-on-one time with you. The last thing anyone wants is for your documents to be overturned in a legal challenge!

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 are scanned to the computer. Therefore, upon the termination or conclusion of your case, you will not receive a hard copy of your file. You will, however, be provided with an electronic copy of your executed estate plan documents upon the conclusion of your case.

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

STORAGE OF YOUR ORIGINAL DOCUMENTS

When it comes time to administer your trust or estate, the original, signed document is what is required to effectively administer your plans. That leads many clients to ask, “Where should I store my documents?” The best option is the simplest option—at home with you. This does not mean shoving documents in a random desk drawer. It means storing your estate plan in a safe, secure location in your home. I recommend you purchase a fireproof and waterproof lockbox for this purpose.

THE PITFALLS OF A GOOGLE “EDUCATION”

Most of the searching you might do about estate planning online or the “tips” you get from friends or family will be incorrect or not applicable to your case. There is no generic law of the land, when it comes to estate planning. Every state has different rules and requirements for documents. What you read online may work for Texas or California, but not in North Carolina. Plus, every family is unique. No two families have the exact same goals, concerns, asset portfolio, health issues, family dynamics, etc. Good estate planning is customized to each individual or family situation. You may actually harm your estate (and thereby your loved ones) by taking action based on recommendations you find on the internet or from well-meaning friends. If you have a question about whether a particular document or strategy is a good fit for you, ask us! That’s why we’re here!

From time to time, we do find articles from well-established sources that offer helpful insight into common estate planning issues. We share these articles across our social media platforms. So.....

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

OBLIGATIONS FOR DISCLOSURE, COMMUNICATIONS & CONFIDENTIALITY

(See Attached Privacy Policy Notice)

Disclosure

Estate planning is an important and highly personal matter. To be successful, estate planning requires you disclose information to the firm about your relationships and financial affairs that you likely consider highly confidential. Estate planning may also require you to make some difficult decisions. You agree to provide the firm with all necessary factual information and materials. We urge you to make a complete disclosure of your financial matters and your intentions concerning the disposition of your estate as a failure to do so would make it impossible for the firm to give you proper advice. 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 your estate planning with your permission (such as your accountant, a bank trust officer, a financial planner, an insurance agent, or another law firm), then you agree that the firm may disclose information to them as necessary to allow them to fulfill their role in your estate planning.



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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.