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PROTOCOL FOR RETURNING ESTATE PLANNING CLIENTS

For returning clients, thank you for continuing to select Legacy Law Group, to assist you in your estate planning matters. Our estate planning review protocol is a three-step process and is as follows:

Step 1: Questionnaire

Once you contact our office for an appointment, you will receive our confidential planning questionnaire either by U.S. mail or as an email attachment. Alternatively, you may download the questionnaire directly from this website via the appropriate link below. We ask that you return the completed questionnaire to our office by mail at 8567 - D Sudley Road, Manassas, Virginia. 20110, or via email to dwilks@llgnova.com, at least two (2) days before your scheduled appointment. As you will find, our questionnaire includes all of the family and financial information that we would like to know about you to properly advise you. One of the forms described below will apply to you:

Click on the link in the Forms section of our website to download our Confidential Questionnaire for Married Couples

Click on the link in the Forms section of our website to download our Confidential Questionnaire for Single Persons

Step 2: Review Appointment

Please bring copies of your existing estate planning documents to the review appointment. For clients for whom our office has prepared these documents, we do not charge them for this review appointment as a service to our existing estate planning clients and as an incentive for them to undertake a periodic review of the documents we have prepared for them. It is our general advice that clients get into the habit of reviewing the documents we have prepared for them at least every three (3) years.

During our review appointment, we will review your responses on, and other information you provided in, the completed questionnaire. We will examine your existing legal documents based on the information that you have provided to us to determine whether various life events and changes in your financial circumstances that may have transpired since your original execution of your documents may dictate changes. At the same time, we will evaluate whether changes in the law have occurred since your execution of your documents that also may dictate revisions to them to be current and valid. We then will discuss the results of this analysis with you at this appointment and discuss with you your options and the fees that would be involved to undertake any revisions to your documents.

Step 3: Engagement Letter and Agreement

We will follow up our review meeting with a letter and engagement agreement detailing the revisions to your documents that we may recommend and the fees associated with those revisions. If you elect to proceed with the revisions that we recommend, even though our review meeting would have been without charge, there will be an engagement agreement to sign and return, together with a payment of a deposit of a portion of the quoted fee as provided in the engagement letter. Typically, but not always, we are able to bill on a flat fee basis for our services and in such case the deposit will be one half of the quoted flat fee. If the complexity of the revisions dictate that the services be charged on an hourly basis, then the deposit will be the dollar amount provided in the engagement letter. Regardless of whether billed on a flat fee or hourly basis, the balance of our fee will be due upon the execution of your revised documents.