# LAW OFFICE OF KEITH R MILES, LLC
# CONSULATION PROCESS CHECKLIST FOR CLIENTS

## SCHEDULING YOUR APPOINTMENT

- ☐ Schedule your initial consultation meeting using the link below:
  https://lawofficeofkeithrmilesllc.as.me/schedule.php

## SUBMITTING THE BACKGROUND INTAKE

- ☐ Locate the Background Intake Form by visiting the site below:
  https://www.estateplanesq.com/clients/
- ☐ Select one of the three DecisionVault links on that page:
  - Decision Vault Intake - Estate Planning *(NOTE: Corresponds to Scheduling Categories 01A, 01B, 01C and 02)*
  - Decision Vault Intake -Elder Law *(NOTE: Corresponds to Scheduling Categories 03 through 06)*
  - Decision Vault Intake – Probate *(NOTE: Corresponds to Scheduling Categories 01A, 01B and 07)*

- ☐ Submit the *fully completed* DecisionVault Intake at least one (1) business day prior to Consultation Meeting.

## CONSULTATION MEETING

- ☐ Check the MyCase Portal prior to the consultation to confirm the accuracy of the Background Intake Form information that you submitted on DecisionVault. (N*OTE: You can access MyCase at https://www.estateplanesq.com/clients/ under the link "MyCase – Case Files".)*
- ☐ If inaccurate or incomplete information is found within the Background Intake Form, please notify the attorney through the MyCase client portal by message or text. (NOTE: Return to DecisionVault by selecting the original link for submission at https://www.estateplanesq.com/clients/)
- ☐ Attend your consultation alone in the beginning as the true "Client*" (i.e. elderly parent). (NOTE: The attorney may permit other individuals to join the consultation at a later point (i.e., adult children or other concerned family members) but it is not guaranteed.)*
- ☐ The attorney will review your DecisionVault Background Intake Form with you during your consultation.
  - MetLife Member: Check length of consultation – Up to 30 Minutes
  - Legal Plan Member: Check length of consultation – Up to 30 Minutes
  - Georgia Legal Services Member: Check length of consultation – Up to 30 Minutes
  - Georgia RSVP Clinic Member: Check length of consultation – Up to 30 Minutes
  - All Others: Check length of Consultation - Up to 1 Hour
  - For Zoom Meeting, check your Zoom instructions the day before your meeting.
  - For an In-Office Meeting, check the Google directions to the office (*3675 Crestwood Parkway, Suite 400, Duluth, GA 30096*) the day before your meeting.
- ☐ At the end of the consultation, make sure you inquire about a fixed and/or hourly fee quote.
- ☐ If you agree to move forward together on your matter (either during or after the consultation), then sign a fee agreement and pay the invoice through the client portal MyCase.

## LAW OFFICE OF KEITH R MILES, LLC
## ENGAGEMENT PROCESS CHECKLIST FOR CLIENTS

**DRAFTING PROCESS: *ROLES AND BENEFICIARIES***

- ☐ Provide the attorney with the required information concerning the beneficiaries of your estate (i.e., spouse, children, parents, siblings, organizations, etc.) by entering on the Contact Table in Decision Vault. (*NOTE: Re-enter your original DecisionVault file which was previously selected at the link at https://www.estateplanesq.com/clients/*)
- ☐ Provide the attorney with details for everyone that may serve in the various roles (i.e., Trustees, Executors, Power of Attorney agents, Advance Directive agents, Guardians for Minor Children, etc.) by entering that information on the Contact Table in Decision Vault.
- ☐ Provide the attorney with information on the sequential order of who will serve in the various roles (i.e., Trustees, Executors, Power of Attorney agents, Advance Directive agents, Guardians for Minor Children, etc.) by entering within the Decision Makers section in Decision Vault.
- ☐ Tell the attorney when you have completed your selections by either message or text through the MyCase client portal. (N*OTE: Access MyCase at https://www.estateplanesq.com/clients/ under the link "MyCase – Case Files".)*

**DRAFTING PROCESS: *DOCUMENT PREPARATION AND REVIEW***

- ☐ Within two (2) weeks, check your email inbox for any notifications from the MyCase portal about draft document submissions.
- ☐ Login to the MyCase portal to access draft documents. (N*OTE: Access MyCase at https://www.estateplanesq.com/clients/ under the link "MyCase – Case Files".)*
- ☐ Download the draft documents from MyCase to your computer for review
- ☐ Within one (1) week, schedule your follow-up/review consultation meeting directly using the link: https://lawofficeofkeithrmilesllc.as.me/schedule.php
  - For Zoom Meeting, check your Zoom instructions the day before your meeting.
  - For an In-Office Meeting, check the Google directions to the office (3675 Crestwood Parkway, Suite 400, Duluth, GA 30096) the day before your meeting.
- ☐ If any modifications and/or additions result from the follow-up/review consultation meeting(s), then you will repeat the steps in this section until the documents have been approved.

**FINAL DOCUMENTS: BINDER RECEIPT AND DOCUMENT SIGNING**

- ☐ Receive binder that will be sent directly from the attorney to your requested location (*NOTE: Default will be the principal residence showing in the DecisionVault Background Intake Form).*
- ☐ After receiving the binder, you will have the option to 1) sign documents at our Duluth office or 2) use another notary of your own choosing.
- ☐ If coming to our office, you will be responsible to arrange for two witnesses *(NOTE: The Law Office of Keith R. Miles, LLC will NOT supply staff to serve as your witnesses, thus this will require coordination between the schedules of yourself, your witnesses, and the attorney.)*
- ☐ Coordinate your schedule and your witnesses schedules using the scheduling tool directly using the link located at https://lawofficeofkeithrmilesllc.as.me/schedule.php *(NOTE: Document signing ceremonies are only conducted during times showing as available on the scheduler.)*
- ☐ If you cannot coordinate schedules, then you may get the documents signed with another notary *(NOTE: Client have typically used notaries located at banks, UPS Store, their jobs, etc.)*