# Your First Appointment with Severns Associates, P.C.

*We are often asked about how individuals become Severns Associates clients. We have prepared this brief article to explain the initial consultation process so you may better understand what occurs during our initial meeting, what information is necessary for us to properly address your concerns, and our fees. If at any time you have questions about becoming a Severns Associates client, please feel free to contact our office.*

**Scheduling an Appointment**

We believe that our first appointment together is the most important. We want you to leave this meeting with a plan that brings you peace of mind.

Your first call will likely be with Alyssa Wiseman, our intake paralegal. Alyssa will take some basic information and schedule a convenient appointment with one of our partners or senior associate. She will also arrange to send you a questionnaire called the Legal Planning Information Form to complete prior to your appointment along with a list of important documents to bring to that appointment. If necessary, Alyssa can also arrange for you to speak to one of our attorneys during this initial call.

**Homework?**

Yes, we do ask you to pull some information together prior to your initial appointment. We understand this may require an extensive review of your files, safe deposit box, and storage boxes. However, we need this information to complete our analysis of your options, which then allows us to provide you with a valuable meeting. Often clients tell us that this exercise helped place things in perspective by reminding them of what they have and prompting a review of important papers.

If you cannot put together every detail prior to our appointment that is okay, but we ask that you forward the questionnaire to us at least two days prior to your appointment. We use this information to prepare for our time together.

**What to Expect in the Initial Meeting**

You will typically meet with Scott Severns or Anna Howard in your initial meeting. They will review your situation and work with you to define your concerns and goals. They will then review the information you brought to us and offer legal options to address those concerns and goals. At the conclusion of our meeting, they will design a plan that addresses your concerns and goals with the best legal option available to you.

**Fees**

We know your time is valuable, and so is ours. We expect to accomplish quite a lot at our first meeting with you. Therefore, we charge a flat fee ($450 for most matters) for the initial meeting which pays for the attorney’s time, review of your situation, defining your concerns and goals, and reviewing your legal options. If you choose to retain our firm, we will apply the initial consultation fee to your project. For example, if your hire us to complete an Asset Protection Plan for you, the initial consultation fee will be applied to the overall project price for the asset protection plan fee.

We also stand by the value of our consultation. If you decide not to retain our firm after the consultation and believe that our initial meeting was of no benefit to you, we will be glad to waive our initial consultation fee.

**Returning Clients**

We always appreciate return business and we typically assist clients with various projects throughout their lifetime. In addition, we strongly encourage our clients to regularly review their plans to ensure they are up-to-date with your familial circumstances, family needs, and the law.

We typically work on a project by project basis. If a new legal issue arises after the end of our prior project, we usually ask you to schedule an initial appointment to discuss your new legal needs. We may ask you to update your information on file with us prior to the meeting. Because we are focusing on new legal issues, requiring legal analysis and formatting of options, we charge a consultation fee for this service.

Our consultation fee for a returning client will depend on the length of time since we have last seen the client, the nature of the new legal issue, and the anticipated scope of our service. We often offer returning clients a reduced fee as we want to ensure their plan is up-to-date. As with our charge for your first initial meeting, we will apply this consultation fee to your project if you decide to retain our firm for your new legal needs.