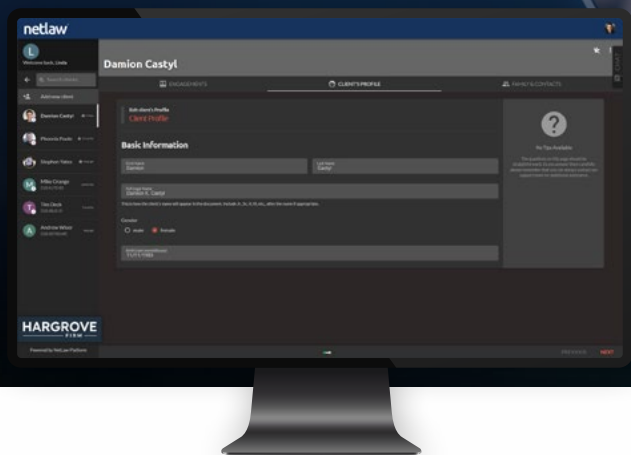


HARGROVE

FREQUENTLY ASKED QUESTIONS



■ Getting Started

I didn't receive an invitation link after training. How do I retrieve it?

Contact [Samantha Vazquez](#) for a new invitation link. Please check your Junk folder in case it landed there.

■ Training & Resources

How can I prepare before my first meeting?

Please review this [pre-meeting orientation video](#) and learn about how to access available resources.

■ Calendar Linking

What calendars can I link?

Connect your Google or Outlook calendars. We do not support Apple calendar linking.

I'm going on vacation or have a week that I am unavailable for client meetings. How do I update availability?

If you've linked your calendar, time blocked off as "unavailable" will be reflected in the portal. For help with setting up your calendar, please refer to this [video](#).

■ Documents

Whose signature block appears on the documents?

Your signature block will be on the documents as an of counsel attorney with Hargrove.

I noticed a discrepancy in a document given a recent change in state law. How do I report this?

Contact [Samantha](#) to report any issues with legal documents.

■ Product & Process

If a Hargrove paralegal participates in client and attorney meetings, is the attorney-client privilege protected?

Yes, paralegals are employed by Hargrove. Attorney-client privilege is protected throughout the process.

How are client documents handled after I finalize them?

Clients enjoy the following benefits and support:

- Secure document processing, packaging, and fulfillment
- Access to documents through the client portal
- On-demand document retrieval
- Access to the at-home notary service

Is there a charge for of counsel attorneys to use the Hargrove Platform for their own traditional practice?

No, a benefit of working with Hargrove as an of counsel attorney is access to the NetLaw Attorney Portal and interviews for use in his or her own practice. For instructions on adding your own client to the system, please refer to the [platform guide](#).

I have a client meeting scheduled for this afternoon, but something came up and I am no longer available. How do I handle this last minute cancellation?

If you need to reschedule, please cancel the calendar appointment so the client will be notified. Then notify the support team as soon as possible through chat or [email](#).

■ Referrals

Can attorneys refer financial advisors and clients to Hargrove?

In the near future, when you refer a financial advisor—and as a result, that advisor's clients—to Hargrove, you will be noted as the of counsel attorney to work on those client engagements and will be compensated for that work just like any other client engagement conducted through Hargrove, assuming you are licensed in the client's state of residence. In the meantime, please contact [Samantha](#) to facilitate referrals.

■ Payments & Records

How do I update my payment information?

Contact [Samantha](#) for payment questions.

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If you have any questions, please feel free to reach out.