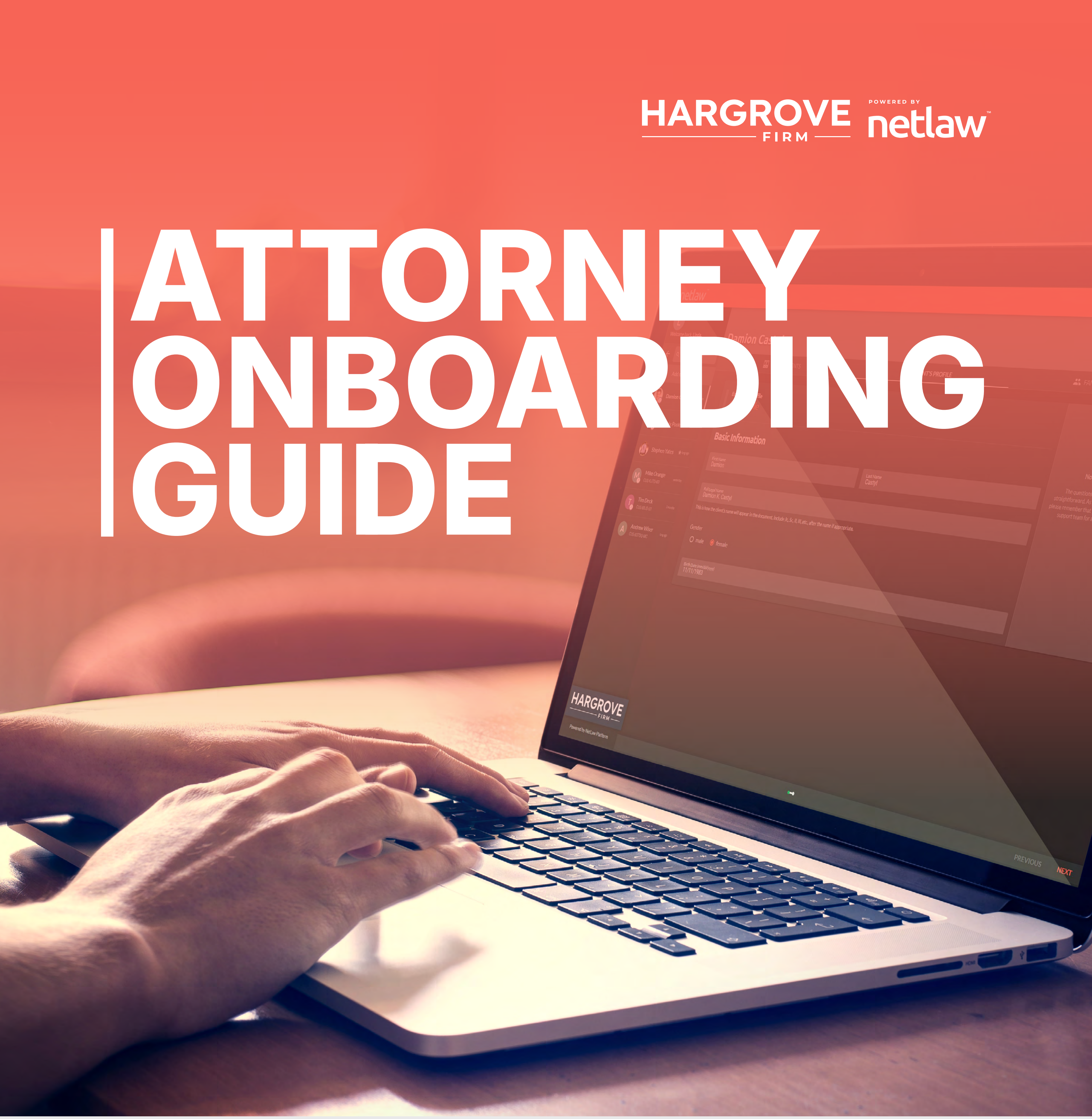
HARGROVE FIRM
POWERED BY netlaw

ATTORNEY ONBOARDING GUIDE



Pre-Meeting Orientation Video

Please review our pre-meeting orientation video to learn what to expect during meetings and how to navigate our system. We recommend you watch this before attending your first meeting.

Compensation Structure

Payment is issued based on the client's selected package:

Essentials Plan:	Advanced Planning Package:	Private Wealth Client:
$200	$300	$500
Attending the plan design meeting and reviewing documents	Attending the plan design meeting and reviewing documents	Attending the plan design meeting and reviewing documents

How the Process Works

- You'll receive a meeting invitation and can **accept or decline.**
- Accepting confirms your attendance; declining allows us to reassign the meeting. If there isn't an acceptance or decline, Samantha Vazquez will reach out to you to confirm.
- A staff attorney leads the meeting—you'll only need to jump in if the attorney asks you a state-specific question, or asks you to weigh in.
- After the meeting, our team handles follow-ups and drafting.

When documents are ready for you to review, you'll receive a **Netlaw notification**. You'll be reviewing for state compliance. We are open to any suggestions or changes you may note, as we strive to keep our documents up to date with each state's specific laws.

We ask that reviews be completed within **two business days**. The files for review are in the client files under the "Hargrove Firm - Draft Estate Planning Documents". You can leave notes/suggested changes in the timeline and mark the task complete once approved.

Zoom Background

Please use a Zoom virtual background during meetings. Setup instructions and the backgrounds can be found here. You may also find this in your Attorney Portal under Resources → Zoom Background Instructions.