

# ATTORNEY PLATFORM GUIDE

## ■ Creating Your First Client

Within your dashboard, you can create a client:

1. Click "Clients" in the left navigation bar.
2. Click "Add new client" in the left navigation.
3. Enter the client's name and click "Create Client."
4. Click "Client's Profile" in the top navigation.
5. Enter the client's basic information. Click "Next." Enter the client's address and contact details. Click "Save."
6. Click "Family & Contacts" in the top navigation.
  - Add new contacts by clicking the circle button in the bottom-right corner of the window, selecting the contact type, and entering that contact's information. Click "Save."

Tip: Input family members and friends who would likely be appointed to fiduciary roles in the client's estate planning documents

## ■ Drafting Documents

1. Click “Engagements” in the top navigation of any client’s account page.
2. Click the “+” in the interview section.
3. Select the document you would like to draft and click “Start Document.”
  - In most cases, you will start with the Estate Planning package. This package includes all the documents available through the NetLaw Platform™ in the standard plan, including a Pour Over Will and Living Trust.
4. Click on the new document or document package in the interview section.
5. Input the client’s selections by navigating through the sections using the buttons at the bottom of the window. You can also navigate through the interviews by selecting next or previous to go back.
  - Once you’ve navigated to the end of the interview, you will want to click on the three dots to the right and select Assemble (.docx) to vault. This action will generate the most current file, reflecting any changes. The document(s) will indicate the date and time of the latest changes.

## ■ Questions? Contact your NetLaw and Hargrove Firm support teams

### **Client matters and document-related legal questions:**

Please reach out to the assigned paralegal on the engagement or Mandy Mills.

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### **Registration and payment questions, and attorney referrals:**

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### **Feedback and general legal questions:**

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### **Advanced product support and technology feedback:**

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