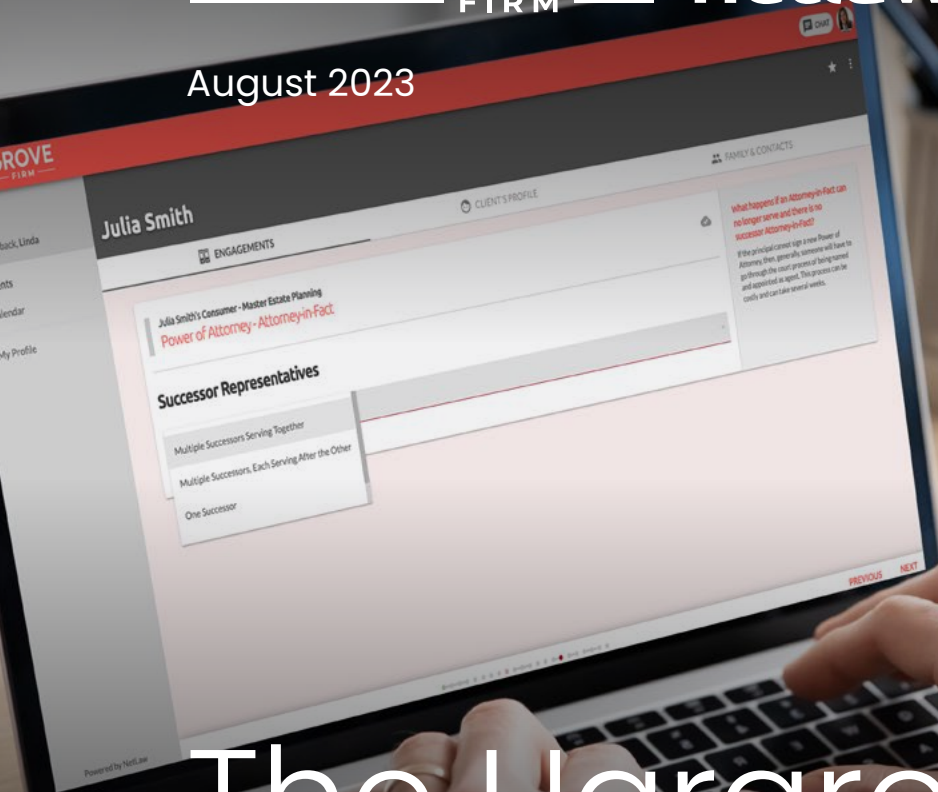


August 2023



The Hargrove Firm Counselor

News & Updates from Hargrove Firm & NetLaw

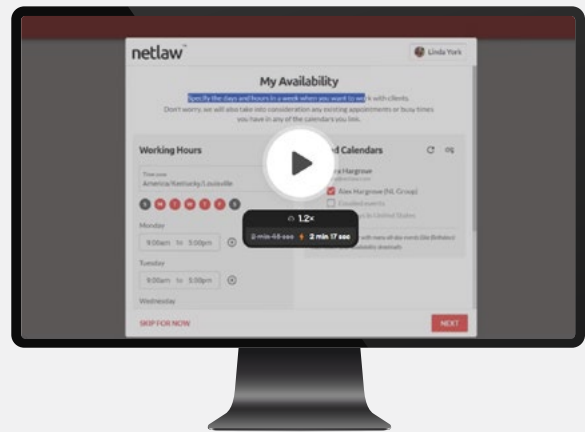
Sync Up:

Ensure Your Availability for Client Engagements Through NetLaw

Configure Your Calendar for Scheduling Efficiency

As a reminder, **your availability must be configured in the NetLaw attorney portal to be eligible to receive client engagements.** Client engagement volume is increasing steadily, so it's essential that both advisors and clients can seamlessly schedule meetings within the system.

The support team will soon begin contacting team attorneys who have not yet linked their calendars, providing them with relevant resources. In the meantime, please consult the helpful video and instructions below:



Watch Video

Instructions:

- 1**
Access the NetLaw attorney portal at attorney.netlaw.com.
- 2**
Click your profile image at the top-right corner of the screen.
- 3**
Click "My Availability."
- 4**
Link your calendar.
- 5**
Set your working hours.

Note: It is necessary to link both your calendar and set working hours. The calendar will reflect your availability (with no details visible to anyone other than you), while the working hours denote the time windows during which you are willing to accept client engagements.

Should you require any assistance in setting up your calendar or confirming that your availability is accurately reflected, please don't hesitate to contact Alex Hargrove at alex@netlaw.com.

Expanding Horizons: Trucentent to Pilot Program with NetLaw, Boosting Client Referrals

Engagement Volume to Increase Beginning Later This Year

As you may recall from previous issues of this newsletter, [NetLaw formed a strategic relationship with financial technology company Investnet's affiliate](#), Trucentent, earlier this year. Building upon this exciting announcement, the companies are now approaching the next phase of their work together. Beginning in the fourth quarter of this year, Trucentent will initiate a pilot program with a select group of financial advisors to refer clients to Hargrove Firm's online estate planning practice through the NetLaw platform.

The pilot program will mark the start of an anticipated substantial increase in Hargrove Firm online client engagement volume. While the initial phase will involve a carefully chosen set of advisors, we expect the volume to continually grow towards the end of 2023 and into the beginning of 2024 as the service is rolled out to more users. Envestnet boasts relationships with some of the country's largest financial institutions, representing tens of thousands of financial planning professionals.

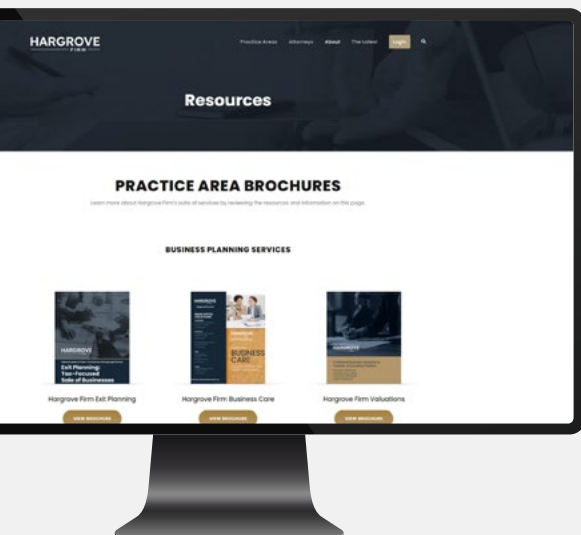
Stay tuned for further updates as we progress in this exciting new phase of collaboration with Trucentent and Envestnet! Feel free to reach out to the NetLaw leadership team if you have any questions or want more information on the firm's growth strategy.

Hargrove Firm Introduces Resources Page

Quick Information for Clients

Hargrove Firm is pleased to announce the new addition of a [resources page](#) on our website. This page is designed to present client-facing collateral, available to anyone interested in information surrounding tax and estate planning legal services. In our continuous efforts to enhance our clients' experiences, this space aims to provide a collection of information in different forms such as practice area brochures, guided handouts, educational materials, and videos. The information library within the resource page is designed to help bridge gaps, clarify complex concepts, and keep our clients and referral sources informed, enabling them to quickly locate the materials they need for specific scenarios.

These resources reflect insights on business planning, exit planning, business care, valuations, trust and estate litigation, and estate planning, with more to be added throughout the upcoming months. The resource page can be found under the "About" section at hargrovetfirm.com.



Of Counsel Attorney Resources



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