

May 2023



# The Hargrove Firm Counselor

**News & Updates from Hargrove Firm & NetLaw**

## NetLaw Forms Strategic Relationship with Trucendent

**Announcing an Exciting New Referral Partner**



**WORKING TOGETHER  
TO DELIVER BETTER  
ESTATE PLANNING  
EXPERIENCES TO ADVISORS  
AND THEIR CLIENTS**

We are excited to share the news that NetLaw and Trucendent have formed a strategic relationship to offer a comprehensive estate planning solution to financial advisors and their clients. Trucendent is affiliated with Envestnet, a technology company that serves about one-third of the wealth management market. Thanks to this relationship, we anticipate that the volume of client referrals to Hargrove Firm's online practice will increase steadily in the third quarter of 2023. In the meantime, the Trucendent and NetLaw technology teams are working together on system integrations. Keep an eye out for a formal press release and more details in the coming weeks.

Please see a LinkedIn post [here](#) from NetLaw CEO Alex Hargrove announcing the partnership.



# New Service Offering: Business Care

## Led by Newly Announced Hargrove Firm Partner Ramsey Watson

Hargrove Firm is pleased to announce its new Business Care program led by Partner Ramsey Steele Easley Watson. Through participation in this program, Hargrove Firm represents clients in the annual maintenance of each business entity that they enroll. The Business Care team will ensure that clients' companies maintain compliance with the appropriate state business authorities and remain in good standing. This includes filing any necessary annual reports with the applicable Secretary of State office(s), as well as preparing documentation associated with changes to clients' foundational documents.

Program benefits include:

- An annual review of the business entity with Hargrove Firm to discuss updates to business structure and applicable law changes
- Annual meeting minute preparation
- Filing of the annual report and facilitation of registered agent fee payments
- Filing of Statement of Change of Registered Agent /Office or Principal Office
- Invitation to participate in Hargrove Firm Registered Agent Services\*

The cost associated with the program is \$595 per year for each business entity enrolled. The first year is prorated as of the date of enrollment.

*\*Please note that there is an additional \$100 charge per business entity for Hargrove Firm to act as the registered agent.*

If you have clients that may benefit from this new program, they are welcome to call 1-877-564-8716 or to email [businesscare@hargrovetfirm.com](mailto:businesscare@hargrovetfirm.com) to schedule a consultation. It would be our pleasure to serve them!



**RAMSEY WATSON**  
PARTNER

# Timely Calendar Reminder

## Sync Your Calendar for Scheduling Efficiency

As client volume steadily increases, it is important that your calendar is synced so that your Hargrove Firm client meetings are only scheduled during times that you're available. Doing so will reduce the need for cumbersome manual reschedules.

Follow these steps to sync your calendar:

- 1** Access the NetLaw Attorney portal ([attorney.netlaw.com](http://attorney.netlaw.com)).
- 2** Click your profile image at the top-right corner of the screen.
- 3** Click My Availability.
- 4** If needed, follow the instructions to add working hours, to sync your calendar, or both.

Please contact [support@hargrovefirm.com](mailto:support@hargrovefirm.com) if you would like any assistance in syncing your calendar or setting working hours.

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# Post-CLE Reporting Reminder

## And Thank You to All Who Attended!

Thank you to everyone who attended NetLaw's complimentary CLE webinar entitled "Irrevocable Trust Planning for the Everyday Estate Planning Client" on May 2<sup>nd</sup>. We hope that it was an informative experience and we value your evaluation feedback! All certificates of attendance have been disseminated, along with the Uniform Application for Approval of CLE to attendees licensed in states beyond those that accredited NetLaw's May CLE webinar. For reference, NetLaw received accreditation from Colorado, Florida, Kentucky, New Jersey, Ohio, Pennsylvania, South Carolina, Tennessee, Texas, and Wyoming.

We recommend that you submit your continuing legal education credits to your state bar(s) as soon as possible upon receipt of these materials. Please note that NetLaw has already reported attendance to Ohio, Pennsylvania, South Carolina, Tennessee, and Texas, as required by these jurisdictions. For any questions or for further guidance, please contact your state bar association(s). NetLaw looks forward to hosting you for future CLE programming!

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