



September 2022

The Hargrove Firm Counselor

Updates from Hargrove Firm & NetLaw

Success ahead: tips for your first client meeting

Prepare for your first Hargrove Firm online client meeting using this guide

Now that you've completed all the onboarding requirements and perhaps are waiting for your first Hargrove Firm client engagement to come through, we'd like to offer some tips to help prepare for your first online estate planning meeting.

Please note that a mandatory meeting with managing partner, Tucker Hargrove, and paralegal Mandy Mills will precede your first client meeting. During this one-time pre-meeting, you, Tucker, and Mandy will walk through the client's estate plan together and address any additional questions you may have.

Client meeting preparation tips:

- Review the [Client Engagement Checklist](#) to get information on the four key areas to focus on when reviewing a client's case and to help guide the meeting.
- Examine the client's SmartGuide™ Interview answers in the NetLaw Attorney portal.
- Generate the documents in case a specific document question comes up.
- Review the client's Needs Analysis section to identify whether any additional or advanced planning may be required.
- Contact Mandy Mills with any questions you may have after looking through the client's Needs Analysis and SmartGuide™ Interview answers and reviewing the documents.
- Try creating a sample client in the NetLaw Attorney portal and input different answers to see how the prompting of the questions compare. For example, there are a couple of options for holding the estate in trust for children. The interview is dynamic in that the client will be asked for different information based on the selections made.
- Review the signature, notary, and witness blocks to ensure that they are up to date with current state law requirements. If you spot an error, please contact Mandy Mills immediately so we can correct it before the client meeting.
- Reference the [NetLaw Attorney Portal Onboarding Guide](#) for details on how to create a mock client and draft documents.
- Review the [NetLaw Attorney portal FAQs](#).
- Consider uploading a Hargrove Firm/NetLaw virtual background to your Zoom account. We recommend testing your virtual background before your first client meeting.

*"Before anything else,
preparation is the key
to success"*
Alexander Graham Bell



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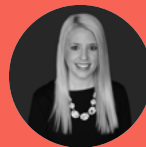
As always, please get in touch with your questions, ideas, and feedback!

Contact Information



Tucker Hargrove

Managing Partner
thargrove@hargrovefirm.com
502.255.2198



Mandy Mills

Paralegal
mmills@hargrovefirm.com
502.255.2198

Introducing the refreshed HargroveFirm.com

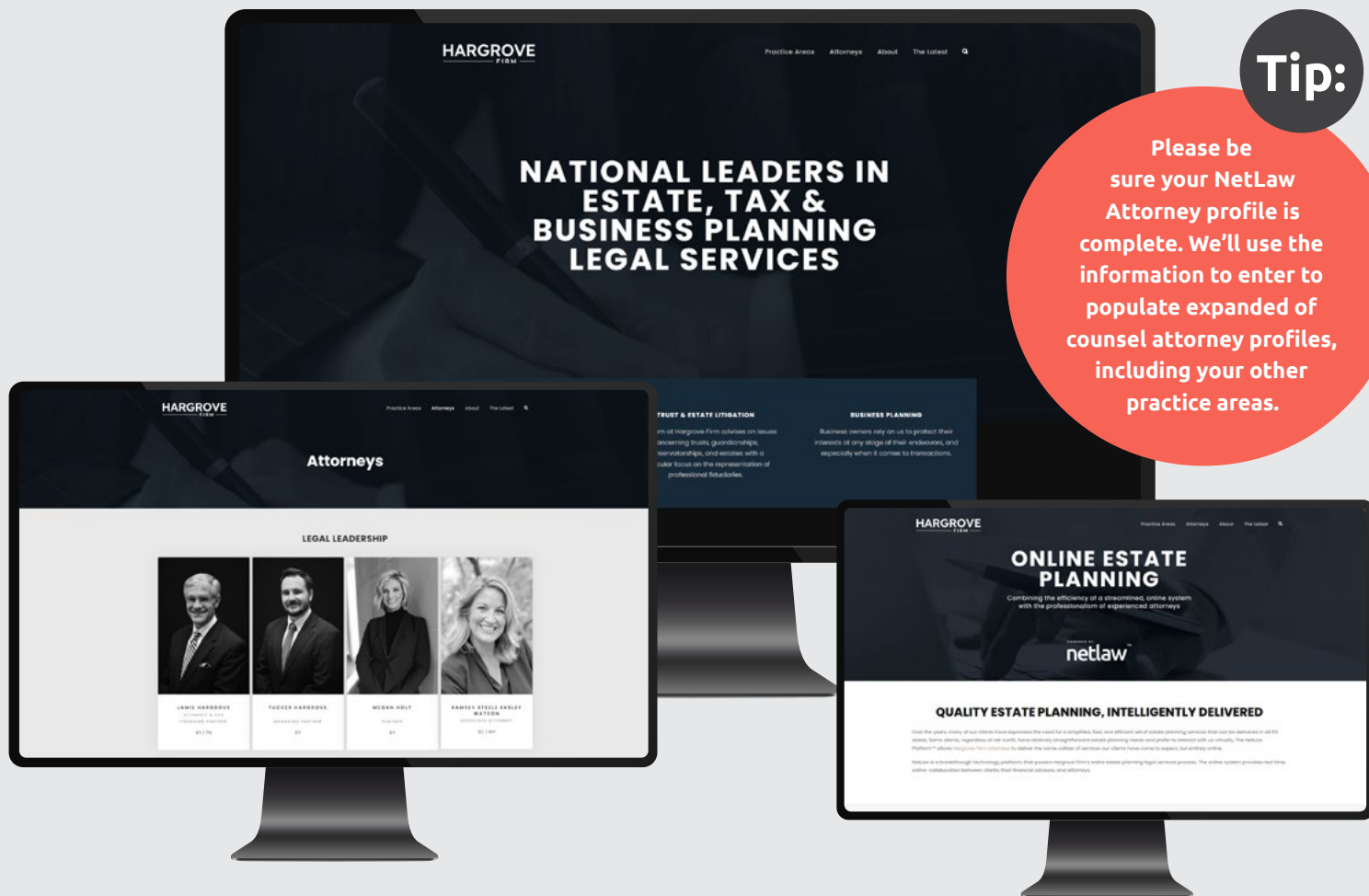
Showcasing a national law practice with extensive capabilities

As Hargrove Firm expanded its reach, so did the need for its website to reflect the Firm's growing list of capabilities and affiliated attorneys. Over just a few months, Jamie Hargrove expanded the national practice into the realms of online estate planning, trust and estate litigation, business valuations, and more.

Please take some time to review the site's contemporary layout and additional content. We recommend checking out the following pages in particular:

- [Attorneys](#)
- [Online Estate Planning](#)
- [Valuations](#)
- [Trust & Estate Litigation](#)

We hope Hargrove Firm's website will be a resource to you as you share information about your affiliation with the Firm and how its capabilities can benefit your professional network and clients. Keep an eye out for future announcements of Hargrove Firm's continued expansion into additional practice areas and how your affiliation with the Firm can benefit you and your clients.



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