James Montgomery
A Professional Corporation
LAW

How Our Law Firm Is Different

The "Traditional" Lawyer Experience

In order to show you how our law firm is different, it's necessary to describe the "traditional" lawyer experience. If you have ever worked with a lawyer, the following scenario will be all too familiar.

You have an immediate crisis or change that needs legal attention, so you make an appointment with a lawyer, who, while discussing your problem, has a way of making things seem very complicated and confusing. You get the sense that this lawyer is smart and must know what he is doing, so you will nod your head and answer questions as if you understand everything. Because you want to do the right thing for your business, you have the lawyer prepare legal mumbo-jumbo documents that you then sign. You take the signed documents back to your office, stick them in a file (fireproof!), and happily mark the task off your checklist as "DONE," secure in the knowledge that you have taken good care of your business.

During those discussions with your lawyer, he probably mentioned specific guidelines for your business dealings, but you really don't recall just what. For example, he might have told you what name, title, and format to use when you sign a document or a check on behalf of your business. To clarify, you call your lawyer's office, get a voicemail, then wait for a call back (which takes several hours at least and sometimes days). Of course, by this time it is too late and you're frustrated, so you resort to doing things the way you have always done them. A few weeks later, lo and behold!, you get a $75 bill in the mail for the 15 minutes you spoke to your lawyer when he finally did call you back. You make a mental note – *unless in jail, do not call lawyer ever again!*

As your business grows, change happens: you add a new business partner or you refinance your building or sell it and buy a new one. You vaguely recall your lawyer saying those few years back to "keep assets separate," but you don't want to be charged for asking, so you don't call. Or you hear about a change in the tax law, but you figure that your lawyer surely would have contacted you if it affected you, so you do not worry about it. Come to think of it, you have not heard from him since you got his last bill and have little idea how to contact him anyway.

Then something bad happens that you cannot fix on your own and you must ask your lawyer for help. Unfortunately, this time you learn that it's almost always more expensive to get out of a sticky situation than to avoid the mess in the first place by simply being prepared with good planning and regular maintenance.

This firm is dedicated to AVOIDING THE OBSTACLES OF THE TRADITIONAL EXPERIENCE. We have based our philosophy on our founder's 30 years of litigating in the courtroom for and against business owners—just like you—who paid dearly for poor business planning and crisis-only management. The plans that they had were not designed to serve their growing company and the many changes that happen on their way to success. **Our plans are**.

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OUR FIRM HELPS YOU PREPARE FOR SUCCESS

What makes our firm different is that we were built with the needs of growing companies in mind. We understand you are BUSY, you are growing, you are planning for prosperity and you value ease, convenience and efficiency. You want to know you have made the best decisions for your company and that your plan will work to keep things operating smoothly. You want to make sure your business will be taken care of in the best way possible, even if something happens to you.

That is our focus as well. Our firm was created by a lawyer who is also a successful business owner. So we have developed unique systems to give you affordable access to an experienced legal team that approaches your legal issues based on sound business principles. With our guidance and long-term commitment, you can build a prosperous business while you accumulate wealth.

We bill like a business, not a law firm. In fact, we have thrown out the "traditional" law firm time clocks so you don't have clutch your wallet to your chest if you call with a quick question (or even a not so quick question). Everything we do is billed on a *flat-fee basis, agreed to in advance*, so there are never any surprises.

We have created unique membership programs that emphasize long-term relationships, not transactional contact. These keep your planning up to date at all times and give you access to our team of legal experts for guidance *at any time* on *any* legal or financial matter. It is all included in the membership you chose. And, on the day you need a lawyer for things other than normal business, we will be here to advise you or get you out of a jam.

Is our unique service expensive? Not really. Paying us now for good planning and continued maintenance is *substantially less costly* than paying us later to extricate you from a preventable crisis. Out of all of our clients who believe in our unique approach to planning and relationship and who want to put it place for their business, not one has left our offices because they could not afford it. We've made creative financing available to our clients because we know that this planning is the foundation for a successful business!

We follow through to make sure all parts of your plan fit efficiently together.

We encourage communication with our clients and strive to answer your questions the very same day. When you call our office you will not have to wait until tomorrow or next week for a return call from an attorney. In fact, you will find that many questions can be answered immediately by one of our trained paraprofessionals. However, if you need a more in-depth discussion with your lawyer, we employ a system to ensure that you speak with him or her that very same day. We teach our lawyers to concentrate on your matter while working on it so we normally cannot answer the phone for unscheduled calls. Thus, virtually all calls to an attorney are *scheduled* for a return call at a specific time when both you and the attorney are available and prepared to talk. This altogether avoids the aggravation of voicemail after voicemail, message after message, back and forth, *wasting your time*. Instead, we are able to offer our exclusive attention to you and your matter without any distractions and with all the necessary information in hand to answer all of your questions, *maximizing your value*.

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HOW TO PREPARE FOR YOUR BUSINESS AND WEALTH PROTECTION PLANNING SESSION

You will get the most out of your personal Business and Wealth Protection Planning Session if you are well prepared.

Please complete the Business Planning Worksheet found in the left hand pocket of this folder. Do not worry if you do not know all the answers--we realize that for many people this is a starting point. The planning process itself is an extremely helpful tool to pinpoint your needs. Please return your worksheet at least *two days prior* to your scheduled meeting to give us the opportunity to thoroughly review your worksheet and be ready to advise you when you come for your meeting.

Please be sure to bring the documents requested below and the worksheet to our scheduled meeting.

If you have a new business, please provide us with the information described on the Worksheet.

If you have an established business, you need to gather bank account statements, brokerage statements, latest tax returns, balance sheets and income statements for the last two years (financial statements), out of state property deeds (we can access your Texas property deeds), life insurance information, corporate record books (if you are a business owner), and retirement plan statements. Again, do not worry if you cannot locate everything as this is just a starting point and we will help you gather everything you need throughout our process.

Now would also be a good time to request beneficiary designation change forms from your insurance company, retirement account custodians, or from your HR department if you have workrelated benefits. While you will not need those right away, you will need them eventually.

If you have any trouble gathering any of this information, do not hesitate to give our Client Services Director a call at 210-690-3700. Remember, we are here to help.