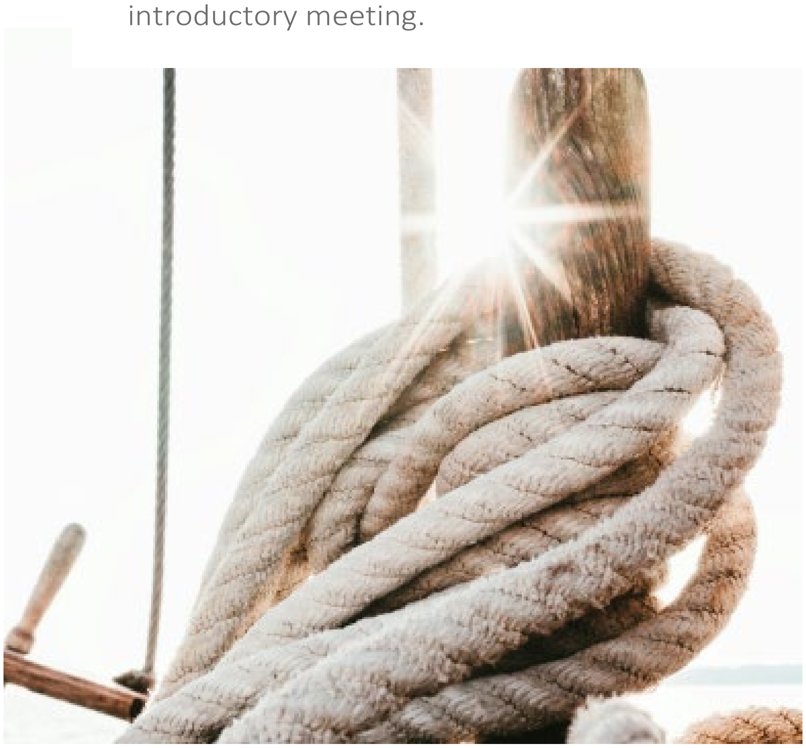
BAGLEY RHODY

ESTATE AND BUSINESS LAW

Private Client Services

Our process begins with an introduction to a dedicated member of the private client services team, who will assist in gathering essential family and financial information in coordination with the scheduling of your initial meeting with a team attorney. To ensure a productive consultation, our specialists will prepare a comprehensive asset statement and collect any existing estate or business planning documents, providing a complete and accurate picture of your current situation.

Our initial meeting is detailed and thorough, designed to help us understand your family, financial, and estate or business planning goals. Together, we build a foundational strategy for the planning, implementation, and administration phases that will support your objectives. All fees for services provided will be discussed in detail during this introductory meeting.



CORE SERVICES WE PROVIDE

Centralized Coordination of Legal Services
We streamline services, serving as a single point of contact for your family's legal needs.

Consolidated Asset Titling & Gift Transaction Tracking
All asset titling and transactions are consolidated for clarity and efficiency.

Estate Flow
Summary flowcharts of your estate plan, including your taxable and non-taxable planning are documented for routine review.

Annual Reviews and Proactive Client-Adviser Communication
Annual reviews and ongoing engagement with advisors ensure plans stay aligned with your goals.

Family Coordination and Strategic Meetings
Regular family meetings foster alignment on objectives and continuity of values.

We pride ourselves on being team players and not overstepping our areas of practice. We enjoy close working relationships with other professionals and if you have a matter that we are not comfortable handling, we will let you know and refer you to someone we know can best handle your needs.