

Professional Services

Plan Ahead and Choose a Law Firm for Life



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Recently I had to purchase a new SUV for my family as my wife and children had had it with “my drive it until it dies” mentality. So I shopped for a couple of months for the best SUV that met the family’s current and long term needs, taking into account price, dependability, reputation, comfort and safety.

This is the same approach you should take in choosing your law firm. As with a vehicle, you

should pick the best firm possible to meet your future needs, whether it is estate planning, buying or selling real estate or your business needs and the inevitable legal matters that come up.

First and foremost, you should choose an attorney you determine to be honest. See if you can meet with the attorney for a free consultation. Some lawyers provide free consultations so clients can meet them to make sure they are comfortable with the attorney. Use this meeting to determine your comfort level and be ready to move on if you are not comfortable with the attorney.

Of course, it goes without question that you should find an attorney whom you can afford. For this reason, you should ask about how the attorney charges for matters. Also, if a flat fee or an estimate of hours is given, ask that it be put in writing. I have had a number of clients ask me for an estimate and I am happy providing one. For many typical

legal matters, the fees are easy to determine as the attorney has done it before, whether it be an estate plan, real estate closings or setting up a business. Many of these matters are done for a flat fee, while complex litigation or estate/trust administration matters may be based on an hourly fee. The goal is to obtain a fair price for the quality of work you are obtaining. Similar to my SUV purchase, if your goal is the cheapest estimate, you are likely to also get the lowest quality.

Beyond choosing someone you find is honest, trustworthy and that you can afford, it is even more important to choose someone who has substantial experience in the area of law for which you require their services. For example, my expertise is estate, trust, small business and elder law matters, but I will refer my clients in need of a litigation attorney to one of our litigators as they have the skill set to navigate clients through the intricacies of court

cases with their many filing deadlines and procedural gymnastics.

Another important aspect is choosing whether to use a large or small firm. For many individuals and small businesses a small firm is fine, but for businesses with multi-state business or unique licensing or federal or international work, a larger firm with multiple offices may be important. Also, it is important to choose a firm that will live beyond you and be able to serve you or your family in the years to come.

As for finding a lawyer to talk to, it is important to ask trusted friends, financial advisors, bankers, accountants and business colleagues as word of mouth and recommendations from those who have seen the product are important. While ads and websites can be helpful, the best referral is one which has the recommendation of someone who has seen the product and is a satisfied customer.



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