

LMB Law Group



NC Planning
Complete Corporate Counsel

Top 3 Things to Consider When Hiring an Attorney

Top 3 Things to Consider WHEN HIRING AN ATTORNEY

Meeting with an attorney for the first time can be confusing and unsettling to many people. However, we assure you; we are real people (or most of us are) just like you and we completely understand the initial concerns, questions and sometimes anxiety in choosing the 'right' attorney. You need to take the time to get to know the attorney and team members to make sure it is the best personality fit and that you have a high level of comfort and confidence working with the law firm. At NC Planning, we want to make sure you have this initial comfort from the very first call, meeting or email.

The key question is determining what to expect from the law firm, your first meeting and what things look like in the relationship going forward. Will those meet or exceed your expectations? If not, maybe it is not the right fit. Not all law firms are created equal and there are a few key items that you should address to make sure you understand what it will be like working with the attorney and their team members. Make sure you ask these questions on that first call or the first email and be comfortable asking these and other questions at your first meeting and beyond.

1 Consideration 1: The Attorney Knowledge in Your Needed Legal Area

Before choosing which firm to reach out to, take the time to investigate. Not only do you want someone who has plenty of experience, but you want to make sure that you are contacting a law firm that specifically focuses in the area(s) of law that you need help with.

Law is becoming more and more of a focused profession. If you look at their website and you see that one attorney practices in many areas of law, they are probably not going to be the right fit for a specific area or need. We call that the "Jack of all Trades" or generalists attorneys. We recommend you have an attorney and law firm team that works with people in your situation or on your specific legal area needs all day every day. For example, you would not want to hire someone that is fighting traffic tickets at the courthouse to also be creating a comprehensive estate plan for you, right?

But, how do you know if their full focus is concentrated in a specific area? There are some questions you can ask or look for when researching their website or when talking to that law firm for the first time:

- How long have they been in practice?
- Who is their typical client?
- What are the typical cases they take on?
- How much of their practice is devoted to this area?
- Do they have any special training or accreditations?

If you find that they in fact do focus on what you need then the next step would be to dig a little deeper, whether that is in an in-person meeting or through the onboarding process with team members. At NC Planning, we have chosen to take the focused approach to law and have the experience and knowledge to back it up. Give us a try and let us discuss how we help clients in our attorneys' focused and specific areas of law.

2 Consideration 2: What Is Their Process?

It is also important to get a clear understanding of their client and service process, so you know what to expect from them and what they expect from you. If they can't paint that picture of what your journey will be or what it will look like, then you need to move on. Again, not all law firms are created equal and where we see the most difference is firms fail to build a client focused process to deliver the legal service and advice.

You should know what to expect every step of the way and always understand what the next step is.

You want to be sure that they can clearly convey what is going to happen and when it is going to happen.

For example, you may be contacting a solo practitioner who answers the phones, intakes the clients, meets with the clients, drafts all documentation and closes all cases

or you may be contacting a team oriented law firm that has one point of contact for you to help you along the way, paralegals that assist in drafting documentation and attorneys who meet with clients to work on the legal masterminding of the client case. No matter what the make-up is, you must understand how they will operate and how long it will take to complete your legal need.

You want to feel confident that when you ask about the process, they give you clear timelines and expectations regarding steps, costs, information needed, your time requirement, their deliverables and overall value to expect.

Some questions to ask to get a clear picture of the process are:

- Who do I contact with questions?
- How should I contact you?
- What is the timeline for our meetings?
- What is the timeline for you to complete necessary documentation?
- What information do I need to provide prior to the first meeting?
- What information will you need from me in the future?

A big bonus to communication is how responsive they will be. Unfortunately, the number one complaint lawyers receive is about their lack of response to clients. Even though they get busy it is not an excuse. Ask the question about when you should expect responses from your questions or follow ups. Do you get a clear response and expectation? What you really want to hear is that they have someone specifically appointed to your case that will respond within 24 hours to phone calls or emails. You want to be confident that “they got you” every step of the way. In our opinion, a team approach is the best way to ensure client satisfaction.

3 Consideration 3: What Are the Fees? How Does the Value Compare to the Cost?

Service, process, communication and other aspects can all vary from law firm to law firm, but fees, billing structures and what you receive for those costs probably can vary the most. It is important to note that not all work product

or legal service is created equally. Remember the saying, ‘You get what you pay for’?

It is very important to have a clear picture of the cost of the services and what you will be receiving in exchange when you enter into an attorney- client relationship. We feel that it is our ethical requirement to be up front and transparent about fees charged with every client and that every law firm should do the same. It may not be possible to quote fees on the first phone call until the attorney meets with you and really understands your situation, but they should at least be able to give you an idea of price ranges or what the typical client pays them. Once they do meet with you and have a full understanding of your situation and the work they will do for you, then they should most definitely be able to be clear about how you will be charged.

Hourly vs. Fixed Fee

HOURLY BILLING

Hourly billing is a fair way of billing clients that many attorneys choose. If you are being billed hourly, the attorney and their team members track the time that they work on your case and you are billed accordingly. Attorney hourly fees can probably range from \$250-600 per hour in North Carolina. If an attorney is going to bill you hourly, then they should be able to give you an estimate of how many hours they will likely spend on your case. It is important that you do not have any surprises if you are being billed hourly. Some things to consider when you are being billed this way are:

- Do I get charged when I contact the office?
- Do I get charged for case updates?
- Do I get charged if you need to speak to other professionals involved with the case?
- Do you take a retainer to bill off of and what is that?
- What happens if you work beyond the retainer, I have paid you?
- What do you charge hourly and what do other staff member charge hourly and who will be doing the work?

At NC Planning, we limit our use of hourly billing to only certain matters in an attempt to allow a client full transparency of fees and costs from the beginning.

FIXED FEE CHARGES

Often, attorneys can scope the amount of work they will do for a typical case and be able to quote a flat fee for the project. They can look at the work involved and project the time it will take themselves and team members and turn that hourly rate into a flat fee. Fixed fee billing provides:

- More flexibility in the attorney-client relationship.
- Allows for the attorney to communicate with other members of your team (i.e. Financial Advisor, CPA, other attorneys, family members) to ensure they are all on the same page without running up additional bills for the client.
- Open communication so that you can ask questions, discuss as needed and not worry about a clock ticking away.

There are some things you will want to make sure you are clear on when entering a fixed fee relationship.

- What exactly does the flat fee include?
- Does it include all meetings, phone calls and emails?
- What services will I receive?
- If it takes more time than expected, will there be any additional fees/costs?
- How will I be billed?
- Will I pay a one-time fee or installments?
- When is the payment due?
- Does this include future communications or work once my initial need is completed?

YOU GET WHAT YOU PAY FOR

Although the way you are charged and the cost of the service to you are factors to consider when hiring an attorney, you do not want to just hire the least expensive attorney you meet. Law firms sell their legal knowledge and time, which is their product, but that product has extreme variations just like any other. For the reasons given above it is important that you are choosing the right legal product as a whole and comparing that to the costs:

- What is the level of experience and knowledge in your needed area?

- What is their customer service process and expectations?
- Will they be responsive to immediate questions or changes?
- How will their legal process work for you?
- Is it a relationship or a transaction?
- Are they providing legal knowledge to help you through each step?
- What legal products or deliverable will you receive?

There is tremendous value in a consultative relationship, and it is ideal to work with an attorney that provides their best to every client every time. It takes time for them and their team members to provide the attention to your case that it deserves, and you should expect to pay a fair price for their time. If you are quoted a very low fee, then you should question what type of effort and time they are going to put into the case and the level of service and responsiveness that you will receive. If you prefer the Cadillac of service, don't expect to pay Kia prices.

KNOWLEDGE, PROCESS & COST

Hiring an attorney is not something most people do on a regular basis and being prepared to ask the right questions can make for a much more comfortable experience. It is important that you have a good comfort level with those you are working with and that you are confident that they are knowledgeable in their industry, can communicate expectations and costs to you and can demonstrate a high level of service and attention to your case.

Also, be prepared to do your part. In order for an attorney to truly advise you, they will need the whole picture. Be prepared to provide the attorney, both prior to the initial meeting and throughout the process, with any requested information. Likely you will be asked to provide them with detailed personal, business and financial information. The more information you give them the better they are going to be able to assist you.

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