

MEMORANDUM

TO: New Client

FROM: The Law Firm of Vogel & Dubois

DATE: March 1, 2023

RE: Welcome to Vogel & Dubois!
Solutions for Your Future

Firm Financial Policies:

At Vogel & Dubois your case will be handled by a team within our office. Attorney Dubois will be meeting with you at the scheduled appointment. We will discuss the issues and strategies presented in your case. As appropriate, other staff members will also work on your case. Our billing statement will detail the work performed by the staff member at their current hourly rates. Current staff members and current hourly rates are as follows:

Matthew R. Dubois, Esq.	\$300 per hour
Betty Libby, Paralegal	\$145 per hour
Legal Assistant	\$100 per hour

These hourly rates may change on occasion. Any representation or work Vogel & Dubois undertakes on your behalf will be charged at the staff member's current hourly rate. In addition, we charge a set rate for the preparation of certain documents or services. We will inform you of flat rate costs if we determine that such services or documents are appropriate in your situation.

We have a flat fee for initial new client consultations with you. This applies only to our first meeting. If we determine that ongoing representation or additional work is necessary at our initial consultation, we may request a retainer. The retainer is a deposit that will be held in the client trust account and, as work is completed on your case, we will withdraw payment from the retainer. We will provide you with a detailed billing of all the work we do, including all charges and any activity in the client trust account, at any time if you request it, or at the conclusion of services.

Directions To Our Office, when you visit:

Our offices are located at 550 Forest Avenue, at the corner of Forest Avenue and Ashmont Street. We are in the area of Portland near downtown between I-295 and Woodford Corner. To reach us from I-295 take exit 6B, Forest Avenue North, and we are about one mile from I-295 away from downtown. Follow Forest Avenue North as you get off the exit. At the fourth set of lights, turn left on Ashmont Street. We are on the second floor of the large brick building directly in front of the United Way office. For free parking use the large lot in the rear of the building on Ashmont Street.

Firm Questionnaire:

The Vogel & Dubois New Client Questionnaire is available on the ‘Resources’ page of our website. You may also have received a copy via email or mail. Please fill it out to the best of your ability prior to your initial consultation. It is important for us to have basic information to best serve you. If there are items you feel are not necessary, or you are unsure of the answer, you may leave them blank and we can discuss them further at your appointment. The information requested in the Questionnaire will facilitate your appointment by giving the attorney the basic information necessary to have a complete and accurate discussion regarding your legal planning needs.

Information and Documents to Assemble:

You should begin to collect necessary documentation regarding your property and affairs and bring it with you to your appointment. Examples of basic documents necessary for review in most cases include:

1. Deeds to any property, titles to vehicles owned;
2. Existing Wills;
3. Existing Powers of Attorney;
4. Trusts;
5. Life, health, or long-term care insurance policies;
6. Current bank statements (checking accounts, savings accounts, Certificates of Deposit);
7. Retirement accounts (401(k), IRAs, etc.);
8. Pensions or retirement income (Social Security);
9. Pertinent correspondence from state and/or government agencies (i.e., Social Security, Department of Human Services, Veterans Administration, etc., including any identification cards if readily available);
10. Recent tax returns (state and federal); and
11. History of substantial gifts.

This memorandum and the firm questionnaire are part of our firm’s introductory materials. If you are unsure of the necessity of the information we are requesting, or you feel your case does not require the materials or information requested, you may choose not to assemble documents, not to complete the questionnaire, or only partially complete the questionnaire and bring only limited materials to your appointment.

Our Commitment:

Vogel and Dubois is committed to you, our client. We are here to assist you in any way possible. Please don’t ever hesitate to give us a call or send us an email with any questions. Related relevant information about our firm can be found at our website: <https://www.maine-elderlaw.com/>. Thank you for choosing Vogel & Dubois for your legal needs.