

LAWRENCE S. PASCOE LAWYER/CLIENT RELATIONSHIP MEMORANDUM

I would like to introduce you to my staff and advise you as to some of my office management practices that relate to our lawyer/client relationship.

AMANDA COUTURIER and ELENA JACKSON

My legal assistants are Amanda Couturier and Elena Jackson. They both can work on all my files. Generally, Elena looks after Wills and the Administration of Estates files and Amanda works on the Matrimonial files. If I am unavailable to take your telephone call, please speak with either one of them. Remember, however, that they are not in a position to give legal advice and you should always email me with your questions rather than them.

VOICE MAIL

We have a client friendly voice mail system that allows you to leave short messages if I or my staff are not available or if it is after hours. My extension is 117, Elena's is 120, and Amanda's is 101.

EMAIL & INTERNET SITE

My email address is: **lspascoe@thepascoedifference.com**. Please communicate with me by email if you desire. My website is **<http://www.thepascoedifference.com>** I invite you to visit my site as there is a lot of useful information on it.

ELECTRONIC STORAGE OF FILES

It has been my practice to retain all my files rather than discard them after a certain number of years. However, after many years of practicing law, I now realize it is impractical to keep storing my files in storage however, I am now scanning everything so I will be able to store your present file electronically on my computer for as long as I am practicing law. Therefore, in the future I can provide you with material you may require but have lost. At your last consultation we will review your file to ensure you take back any original documentation I might still have. I will also provide you copies of all pertinent documents and provide you with electronic versions of important signed documents.

FOLLOW UP SERVICES

I would like to advise you that I provide my clients a number of free services even after a file has been completed. They are as follows:

- I will provide free swearing of Affidavits or Statutory Declarations for my clients. This is often needed for insurance claims and when one receives a bequest under a Will. I just ask that the forms be completed and an appointment is made to sign with either me or my secretary.
- I will provide digital copies of any major documents such as Wills, Powers of Attorney, Court Orders, Agreements and Certificate of Appointments if misplaced.

- My web site on my Client's Page has replacement forms for your Will and Powers of Attorney Manuals. They are found at <http://www.thepascoedifference.com/pdfs/willmanualforms.pdf>
- My web site has a sample Consent to Travel form which I will sign for free for you or your former spouse if you just call before hand and have the form all filled out.
- I will hold on to completed Will Information Forms in your digital file.
- I will hold on to your Will in my fire proof safe.
- I will recommend or help you find a lawyer in Ottawa for an area of law you may need but that I do not practice.
- I am available to provide legal services to your friends and relatives.
- My comprehensive web site has many articles on Family Law, Wills, Powers of Attorney and the Administration of Estates.
- If you have an appropriate web site for your own business I could feature it and have a link to it from my Resource Page on my web site.
- I will try and send follow up emails to remind clients of work they were to do after their file is closed.

AREAS OF PRACTICE

Included in my packets and in this manual is my resume that sets out in more detail my areas of practice and information about myself.

CLIENT COMMENTS AND SUGGESTIONS

I have always not only been open to suggestions from my clients to improve my services, but have actively sought their opinions. That is why I have had my survey contest since 1993. The winner that year was a client who suggested I learn about this new technology I had not heard about yet. He told me about "the internet". I now particularly would like client feed back as to how to improve my follow-up services. I annually award Ottawa Senator Hockey Tickets for the best suggestion.

REFERRALS ARE APPRECIATED

Your referrals of family and friends (or even people you do not like) are also requested. Word of mouth advertising is an important element of my practice and any lawyer's practice. If you are happy with my services please tell the world (and if you are not please, tell me).

CLIENT INFORMATION FORM

To continue our relationship, I will retain your detailed data so I can better serve you on a going forward basis. On my website on my forms page, <http://thepascoedifference.com/forms.html>, I have a Client Information Form, form 14, which I would ask that you use when information changes.