

LAW OFFICE OF KEITH L. MAGNESS

Topic:

TELEPHONE CALL POLICY

CLIENT GUIDELINES

In order to eliminate communication and ensure clear, open communication between our office and you regarding your matter, our firm has developed the following telephone call policy.

TELEPHONE CALL POLICY

As a client, you are entitled to make reasonable requests for information from our office concerning the status of your case. In order to ensure that your important non-emergency questions and concerns get the attention they deserve, we offer two kinds of appointments: In-Office and By Telephone.

The firm's capable and excellent staff keeps the office calendar and makes appointments. When you have a non-emergency question or issue to discuss, please provide a detailed description to the staff member when you schedule the appointment to speak with your attorney. This way your attorney can be prepared for the appointment.

When you call the office, please identify yourself and the matter that you are calling about. If it is a routine question that does not require legal advice, please ask a staff member for help. "Routine" might include, for example, asking when your hearing is, whether you must be present, or the meaning of a term on a form you are filling out.

If you are calling in regards to an emergency as that word is defined in our office's Emergency Defined & Access to Your Attorney guidelines, please use that word and our staff has been instructed to take every step possible to reach your attorney including calling his or her cell phone, home telephone number and even the cell phone of your attorney's family members on your behalf. Because of the nature of our work, these private telephone numbers cannot be disclosed, but will be called for you.

As a reminder, our office considers an emergency something that is an *immediate* threat to your life, liberty or property. In most cases, if you have an emergency, before calling your attorney you should call 911.

Telephone appointments will be charged at the same rate as time spent discussing your case in the office. You should use your common sense and good judgment in deciding whether your question is urgent enough to warrant the extra expense or if it can wait until your next scheduled office appointment or status report for which there is no charge. If your attorney has previously given you the information you need to answer

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your question, but you have misplaced it, you will not be charged for sending you an extra copy if that is the only reason for your call.

Please do not ask office staff for legal advice. They are not attorneys licensed to practice law and cannot give legal advice. Finally, if your phone number changes, please advise this office as soon as possible.

Topic:

**EMERGENCY DEFINED &
ACCESS TO YOUR ATTORNEY**

CLIENT GUIDELINES

EMERGENCY DEFINED

To provide clarity between our clients and the firm, we have defined what constitutes a client-related emergency. An emergency is an *immediate* threat to a client’s life, liberty or property. In many such cases, the client should have already called “911” if applicable. An emergency mandates an immediate response and the attorney will be interrupted **no matter what.**

Emergency versus Urgency: Our clients are asked to please consider whether the matter is urgent as opposed to an emergency. Our staff will prioritize any (non-emergency) urgent issue and make sure that the information is conveyed to the attorney as soon as possible in such situations. We ask this of all of our clients so that we can focus on the matter we are working on without unnecessary interruption.

ACCESS TO YOUR ATTORNEY

Access to Attorneys -- Meeting and Call Policy:

In order to better serve our clients and make the best use of your time, our attorneys arrange all calls and meetings ahead of time. We have found that in addition to preventing a lengthy game of phone tag, scheduling calls and meetings also ensures that our attorneys can be prepared for the call or meeting and can devote their full and complete attention to the important matters that will be discussed at the call or meeting. Our staff will assist in determining the nature of the question and whether you wish to meet with the attorney in person or have a telephone conference call. Please provide a detailed description to the assistant when you schedule the appointment so your attorney can be prepared for the appointment. If there is any information which the staff can assist with, please let them know.

Email Policy:

In order to provide the best service to our clients, our attorneys prioritize client matters by legal need. That allows us to devote our full time and attention to client matters with impending deadlines and court hearings.

In order to maintain focus on our most important client matters, it is the policy of our office to attempt to check email twice per business day. As a result, we cannot always respond to email communications immediately.

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The attorneys in our firm strive to respond to emails as quickly as possible. If you have an immediate concern, please call our office and schedule a time to talk by phone.

New Case Developments:

As new developments arise in your legal matter, you will need to have periodic meetings with your attorney. These meetings may have a singular focus, such as preparing for a specific meeting or court appearance, or it may be for a general status update on a number of issues.

New Information:

Please be sure to contact our office and relay any new information related to your case. If there are new documents, please make sure to relay a copy of those documents to our office prior to talking to your attorney about the information.

New Matters:

If during the course of our representation with you a new legal matter arises, we are happy to discuss this with you. However, please be sure to mention this when scheduling time to talk by phone or in person so we can schedule adequate time to discuss the new matter.

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Topic:

ATTORNEY-CLIENT CONFIDENTIALITY

CLIENT GUIDELINES

EVERYTHING in our relationship is confidential. The ethical requirements of the lawyer apply to all employees of the law firm. We treat all client communications, whether oral, written or otherwise, as highly confidential information that may not be repeated or communicated to any other person without the express consent of you as the client.

However, that confidentiality can be waived if you inadvertently discuss your case or disclose any confidential information with a non-lawyer outside of our firm. Please be cautious with all paperwork you receive from our office and all conversations you have regarding the matters for which we are assisting you. Additionally, please refrain from discussing your case with friends and family, and NEVER share any details over social media like Facebook or Twitter.

LAW OFFICE OF KEITH L. MAGNESS

Topic:

**RELATIONSHIP BOUNDARIES AND
DURATION OF THE
ATTORNEY-CLIENT PRIVILEGE**

CLIENT GUIDELINES

We require that relationships between members of the law firm and our clients be of a professional nature only. Firm members are expected to treat all clients and potential clients with professionalism, courtesy and respect without the relationship becoming personal. For example:

- Staff members may not, under any circumstances, enter into a close personal friendship or romantic relationship with a current client.
- Additionally, any contact with a client via Facebook or any other social networking website is prohibited (even if the client initiates the contact) due to the open nature of such websites and the risk of inadvertently disclosing confidential information.
- Since our obligation of confidentiality includes shielding the fact that a client has retained us, firm members who encounter a client in the community will not acknowledge the client or do anything that would require the client to acknowledge knowing someone in the firm—unless such contact is initiated by the client. Even in this case the firm member *will not* discuss or communicate any information related to the case in the presence of any other person.

At the conclusion of our representation, we will close our file. However, the attorney-client privilege remains in effect throughout the remainder of the former client’s life and will even continue after death.

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Topic:

HONESTY DEFINED

CLIENT GUIDELINES

Honesty and trust are cornerstones of any great relationship. With this in mind, both clients and attorneys must be truthful and sincere in all communications. If you do not provide us with completely honest communications about the underlying matter, we will not be able to fully do our job to assist you. While some things may seem embarrassing, please let your attorney know so we can address it and be prepared if it comes up as part of the legal matter.

When you are completely honest with us we can better represent your interests in your case. We cannot plan for or defend what we do not know.

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Topic:

REFERRALS

CLIENT GUIDELINES

The Law Office of Keith L. Magness, LLC is well-known in the legal community and we have many friends and colleagues that we know and trust. We are happy to assist any of our current and past clients, or friends and family of our current and past clients, to find a lawyer they can trust to help them.

Whether the new matter is for you, a friend or a member of your family, we will provide a free initial phone conference to assist in determining the type of legal issue so we can find an attorney who can help. If the legal concern is in an area in which we practice, the referred person will be given an opportunity to come in for a consultation with us.

If the legal concern is in an area outside our usual practice areas, we have a network of attorneys we trust to do solid work and to treat clients with the same courtesy and respect we provide. We stand behind each referral we make, and if there is ever a problem, we will want to know immediately.

Finally, we want to reassure you we have not and will not share anything about your past, current or future cases with anyone, and that includes the person who referred you to us or anyone you refer to us. We have the same conversation with everyone, so all clients know that their personal information is safe with us.

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ACKNOWLEDGEMENT

CLIENT GUIDELINES

By signing below, you, our client, are acknowledging receipt and understanding of the below listed Client Guidelines, and are agreeing to abide by same during our representation of you. Should you ever have any questions regarding these guidelines, please feel free to email or call our office.

- Telephone Call Policy
- Emergency Defined & Access to Your Attorney
- Attorney-Client Confidentiality
- Relationship Boundaries and Duration of the Attorney-Client Privilege
- Honesty Defined
- Referrals

Understood and Agreed:

Client Signature

Date