

**HOW TO BE AN “A” CLIENT AT
THE MEDLIN LAW FIRM**

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I. Attorney client confidentiality

All information given to your attorney is protected by attorney-client privilege, meaning the information is kept in confidence. This obligation of maintaining your secrets never expires. It continues until the end of your life and beyond.

However, you can lose this valuable privilege if you disclose confidential privileged information to others, so you must be careful when talking to others about what you and your lawyer have discussed. Please be cautious of all paperwork you receive from our office and all conversations you have regarding the matters for which we are assisting you. This is the purpose of the client communication form you signed when retaining our firm. If you list someone in the "person we can speak to on your behalf" section, the confidential privileged will be waived and that person will be allowed to receive all information about your case.

II. How to contact us

Your attorney is frequently out of the office due to court appearances, hearings and trial. That means you will generally not be able to call in and reach him or her without a scheduled telephone appointment. To ensure the availability and undivided attention of your attorney, we ask all of our clients to schedule phone calls with their attorneys. This can be done by calling and talking to one of our assistants (who in many cases may actually be able to answer your questions or solve your problems). "In office" appointments are scheduled the same way.

You may also email your attorney but understand that emails are not checked 24/7 and are prioritized by need. This policy allows us to provide the best service to all of our clients and to address urgent issues first. Expect it to take up to 24 hours for an email response during the workweek, and longer over weekends or holidays.

Please see "Contact Information" in your firm folder for numbers and all staff emails.

III. Office hours

The Firm's working hours are 8:00 a.m. to 5:00 p.m. Monday through Friday. In exceptional situations, phone appointments may be scheduled outside of these hours. This is done on a case by case basis as determined by your attorney.

The office is closed on weekends, all major national holidays and the day after Thanksgiving.



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Our phone is answered 24-7, but after business hours and on weekends, our phone is answered by a live answering service who will take a message. If told it is an emergency, the answering service will try to reach a staff member. If the staff member does not answer, a text message and email will be sent to please return your call immediately. Please only state it is an emergency if it is a true emergency. Please see IV "Emergency v. Urgency & Access to your Attorneys".

IV. Emergency v. Urgency & Access to your Attorneys

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. This includes after-hour calls.

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. Legal assistants will answer your questions whenever possible.

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 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. There are many issues and questions which the legal assistants can answer and handle to your satisfaction.



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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. As a result, we cannot always respond to email communications immediately. 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. Emails are not monitored in the evening, after normal business hours or on weekends.

V. Honesty

It is important that you are always honest and forthcoming about the facts of your case with your attorney and any member of our staff. 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. Finding out all of the facts from the beginning allows us to tailor a case strategy with all factors in mind. A delayed disclosure from the client or finding out important information from another source often requires us to change case strategies in the middle of negotiations with the District Attorney.

This generally leads to wasted time and client money as well as increased jeopardy of the matter turning out badly.

We cannot plan for or defend what we do not know.

VI. Relationship boundaries

We expect our staff to always treat our clients courteously and professionally. While we do not anticipate any problems in this regard, we also want to mention that we don't permit our attorneys or staff to enter into or be involved in close personal or romantic relationships with clients unless those relationships existed before the client retained our Firm.

- Additionally, we prohibit our attorneys and staff from interacting with clients via Facebook or any other social networking website. Please do not use social media when communicating with anyone in our firm due to the open nature of such websites and the risk of inadvertently disclosing confidential information.
- Finally, since our obligation of confidentiality includes shielding the fact that you have retained us, our attorneys and staff who encounter you in the community will not acknowledge you or do anything that would require you to disclose that



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you know someone in our firm. You, of course, are free to initiate such contact, but the decision will always be yours. However, even if you initiate contact our Firm member *will not* discuss or communicate any information related to the case in the presence of another person.

VII. What we bill for

- You may have questions about the items that we bill. Our invoices to you will include two broad categories of charges, FEES and COSTS.
- FEES are the amounts we charge for our legal services.
- COSTS are amounts that we pass on to you for our out-of-pocket expenses or services such as investigators, experts, service of subpoena, certified copies, court costs and filing fees.

What we don't bill for:

- We don't bill for administrative staff time or the work involved in preparing our monthly file reviews. We don't bill for routine office supplies, postage, telephone or long-distance service.

VIII. The basis of our billings

FLAT FEES: We charge a flat fee for the entire matter or for a significant portion of a matter. The details of this are defined in the representation agreement and were discussed with you when retaining our firm.

IX. Non-payment

In certain circumstances, we allow some clients to pay their fee with a payment plan. We focus our time and effort on achieving excellent results for clients and we are not in business as a collections agency. Rather than chase people who are not paying on a current basis we have adopted the following practice which has the benefit of driving out problematic clients, thus giving us more time to focus on the work of our "A" Clients.

Therefore, if you fall behind on your agreed payments per your representation agreement, we will stop work until you are current. If you remain in arrears we will withdraw from the case and close your file. While we don't anticipate these problems,



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we think it only fair to let you know how we deal with them. Just as you would not work for an employer who does not pay you, we will not work as your attorney without being paid on a current basis.

X. New case developments

As new developments arise in your legal matter, you may 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. These will be scheduled through the legal assistant assigned to your attorney.

XI. 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.

XII. 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. New matters are not included in your current representation agreement and will not be pursued by our office unless you sign a new representation agreement and pay an additional retainer.

XIII. Treatment of opposing parties and our staff

While not every situation is contentious, on occasion a matter can become heated or escalate in tension. We want you to know that in fulfilling our duty to vigorously represent you, we will engage in a manner designed to best represent you while maintaining the professionalism and integrity of our profession. Likewise, we expect you to be professional at all times, including in court, at hearings/trial, and in any other meetings, via email or over the phone.

We expect all clients to remain courteous and respectful toward the other party, and always take the high road. This is beneficial to your case and your mental health.



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We realize you will feel stress during the pendency of your case. However, we will not tolerate offensive or abusive language toward our attorneys or staff members in person or on the phone.

XIV. File retention

Our firm maintains your file while your case is active. In agreement with the District Attorney's office, we may not provide you copies of any evidence they provide our firm in regards to your case. You will be able to review these documents, and/or video/audio if any, during your in-office meeting with the attorney.

In addition, the Firm will retain a paper copy of your file for ten years. After conclusion of a case this file is stored off site. If a client misplaces documents and requests copies from a closed file, appropriate fees will be charged for the task of obtaining the stored file and making copies.

XV. Referrals

The Medlin Law Firm is well-known in Texas and we have many friends and colleagues 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 chosen 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 people 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.