BAGLEY RHODY

ESTATE AND BUSINESS LAW

Private Client Services

Our process begins with an introduction to your dedicated Client Coordinator, who will assist in gathering all relevant family and financial information and scheduling an introductory meeting with an attorney within the PCS department. Your Client Coordinator will begin compiling a comprehensive asset statement and collecting any existing estate and/or business planning documents to provide a complete picture of your current situation and to ensure a productive initial meeting.

Our initial meeting is detailed and thorough, designed to help us understand your family, financial, and estate or business planning goals. Together, we build a foundational strategy for the planning, implementation, and administration phases that will support your objectives. All fees for services provided will be discussed in great detail during this introductory meeting.

CORE SERVICES WE PROVIDE

Centralized Coordination of Legal Services

We streamline services, serving as a single point of contact for your family's legal needs.

Consolidated Asset Titling & Gift Transaction Tracking

All asset titling and transactions are consolidated for clarity and efficiency.

Estate Flow

Summary flowcharts of your estate plan, including your taxable and non-taxable planning are documented for routine review.

Annual Reviews and Proactive Client-Adviser Communication

Annual reviews and ongoing engagement with advisors ensure plans stay aligned with your goals.

Family Coordination and Strategic Meetings

Regular family meetings foster alignment on objectives and continuity of values.

We pride ourselves on being team players and not overstepping our areas of practice. We enjoy close working relationships with other professionals and if you have a matter that we are not comfortable handling, we will let you know and refer you to someone we know can best handle your needs.

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