

## **Estate & Trust Litigation**

When you call Bagley & Rhody, you'll be answered by our welcoming receptionist or Client Coordinator, who will begin the client intake process. They will get some basic information from you, ensure that there are no conflicts and we are able to represent you, and ask you for any relevant documentation.

This initial information will be relayed to our litigation team. Our team will immediately get to work carefully reviewing the information and documents provided, and someone may reach back out to you to request additional information. Our goal is to have as much information as possible to ensure that we are able to take on your matter and to ensure that the initial call or meeting is as productive as possible.

Once we complete our review of the information and documentation you have provided to us, we will then determine if it is a matter that we are willing or able to handle.

We are not able to take on every potential litigation matter. If we are not able to assist, we will notify you and if we have any recommendations for potential referrals, will relay that to you.

If we are able to move forward, we will set up an initial meeting and begin determining the next steps. Almost every meeting will include two team members, the lead attorney and a supporting team member. This allows us to provide you with the utmost attention and allow us to be readily available to answer any questions or concerns you may have at any time.

After the meeting, you will receive our engagement letter outlining the terms of our legal services. Almost all litigation matters require an upfront retainer and are billed on an hourly basis. If there is a possibility of a contingency type arrangement, we will let you know; but, most estate and trust related litigation matters are not appropriate for a contingency.

Throughout the process, you will continue to receive status updates and information about the next steps in the process. Every litigation matter is different. We understand that the litigation process can be overwhelming and stressful. Our goal is to be your guide and to obtain resolution of the conflict.



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.