

Your Rights as a Client of Slater & Associates

Any good relationship is based upon mutual respect and understanding. This worksheet, when completed and signed by you will help define our relationship, and will indicate your agreement to engage the firm of Slater and Associates under the following terms and conditions. This relationship will be based upon the Indiana Rules of Professional Conduct, which all Indiana attorneys are bound by.

1. You have a right to a competent attorney. George has been in private practice since 1979 and has received formal training in business, law, and accounting. He is board certified by the National Elder Law Foundation. Nancy has been a licensed physician in Indiana since 1978 and a member of the Indiana Bar since 1999, having entered full-time practice of elder law more recently. She is a 2006 Charter Member of the Academy of Special Needs Planners and a member of the National Academy of Elder Law Attorneys. Both George and Nancy take more than the minimum continuing education courses required by the Indiana Supreme Court. No attorney “knows it all” but we will do our best for you.

2. You need to know who your attorney represents. Sometimes, a conflict of interest may keep us from representing the whole family. Usually, we represent the senior person as the specialty of elder law would indicate, or sometimes a disabled individual. We can represent more than one party if there is consent and no conflicts arise that would impair our ability to represent the primary client. In a guardianship proceeding, although we will always act in the incapacitated person’s best interest, we can only represent one side of the matter – either the proposed guardian, or the alleged incapacitated individual. In this matter, the party or parties represented is/are:

Conflicts of interest noted are:

3. You, as the client, determine the goals of this representation, and you have the right to terminate our services as your attorney at any time. We also reserve the right to withdraw from this representation as your attorney with appropriate notice to you. Together, we will decide how best to achieve the goals you desire. The goals of this representation are:

Possible future goals are:

4. You have the right to be kept informed of what your attorney is doing for you. We would ask, however, that if you have questions, please speak up. Sometimes, while handling multiple cases, someone doesn't get the attention they need at that particular moment – so please ask!

5. You have the right to have your confidences kept. We will not disclose information you have given without your consent – even if you do not become our firm's client. When you hire an attorney with Slater and Associates, however, you are implying that he or she has the right to disclose those things necessary to carry out the engagement. Are there any special things that need to be kept confidential? Please specify:

6. You have the right to be informed as much as possible about the attorney fees that you will be charged. An estimate of the fees to be charged in this matter is:

7. If you have a mental or physical disability, you will be treated with respect and we will try to follow your wishes. However, you also need to be aware that if an Indiana attorney believes a client is at risk of substantial physical, financial, or other harm, the attorney may take protective action without the client's consent.

8. Other concerns:

Dated this ____ day of _____, 2007.

Attorney Signature

Client Signature

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Client Signature