

Benson & Case
Attorneys and Counsellors at Law

CLIENT SERVICE PLAN

The IDEAL WEEK™

(“A Standardized Approach for Individualized, Focused Service”)

We pursue a concept known as the “Ideal Week” in order to better serve your needs through highly focused and targeted effort. Briefly, the Ideal Week involves implementing specifically scheduled planning and meeting time on a regular basis to address particular client service and firm planning needs.

During these times, all or part of the law firm service team will be unavailable by phone. In order to assure continued responsiveness, the phone message service will be regularly checked, and you will also have access to all firm team members through e-mail. As always, clear and “easy” questions will be answered immediately with a return call from the appropriate team member. Questions and concerns that involve legal issues will be handled on a scheduled teleconference or in-person appointment basis.

The areas we will target include Legal Support (amendments and document preparation), Settlement (asset transfer, tax preparation and advice following client death or disability), Funding (asset transfer, both upon the initial formation of the estate plan and on an as-needed basis thereafter). In addition, we are emphasizing the need for better organization and coordination among the various service tasks within the firm.

Finally, we are scheduling standard firm office hours, as well as regular planned time off. Time off includes business retreat time (once per quarter), as well as personal vacation time. We believe it is essential that our professional service team be fresh and focused, and that you are best served by knowing exactly what to expect in terms of access for assistance you require in implementing your planning.