

# FRAME LEGAL



BUSINESS | WEALTH

## Client Account Manual



# Table of Contents

<b>1</b>	<i>Establishing Your Secure Client Account</i>	1
	Virtual Access Anytime, Anywhere . . . . .	2
	Step 1 . . . . .	2
	Step 2 . . . . .	3
	Step 3 . . . . .	4
	Re-Login For Security . . . . .	5
<b>2</b>	<i>Creating A Case With Frame Legal</i>	6
	Contact Information . . . . .	7
	Private Information . . . . .	8
	Settings . . . . .	9
	Change Password . . . . .	10
	Step 2 . . . . .	11
	Step 3 . . . . .	12
	Update Preview . . . . .	13
	Review Message . . . . .	14
	Case List View. . . . .	15
<b>3</b>	<i>Communicating With Your Attorney</i>	16
	Read Full Discussion Thread . . . . .	17
	Downloading Files. . . . .	18
	Uploading Files . . . . .	19
	Client Discussions . . . . .	20
	Case Status Updates . . . . .	21
	Yellow Sticky Note Notifications. . . . .	21
	Scheduled Meetings And Event Notification . . . . .	22
	Events . . . . .	22
	Calendar . . . . .	23

# Table of Contents

---

<b>2</b>	<i>Payment And Billing Features</i>	24
	Payment . . . . .	25
	Review Quote . . . . .	26
	Accept Quote . . . . .	26
	Invoices . . . . .	27
	Viewing Invoice . . . . .	27
	Viewing Charges . . . . .	28
	PAYPAL . . . . .	28
	PAYPAL Re-Direct . . . . .	29
	End Of Matter Questionnaire . . . . .	30

# 1 Establishing Your Secure Client Account

This Manual will explain how to establish your secure Client Account with Frame Legal, create a case with Frame Legal, communicate with your attorney, and how to utilize the payment and billing features.

If you use email, bank online, or shop online, you will easily be able to communicate with our office through your secure client account anytime, anywhere, and at your convenience.

The screenshot shows the Frame Legal website homepage. At the top left is the Frame Legal logo, which consists of a stylized 'F' inside a square frame. Below the logo is a navigation menu with the following items: FIRM, BUSINESS, WEALTH, PROFESSIONALS, RESOURCES, and CONTACT. The main content area features a large image of a building with a clock tower, partially obscured by palm trees. Below this image is a news section with the headline "GE's bad news: Why nobody cares" and a sub-headline "How wacky is this market? General Electric slashed its earnings guidance for the third quarter and the whole year and Wall Street didn't even blink." To the left of the news section is a "CLIENT LOGIN" button with the text "Virtual Access Anytime. Anywhere" below it. At the bottom of the page is a footer with the text "Frame Legal LLC Copyright © 2008 | Publications & Brochures | Credits | Legal Notice | Privacy Policy" and the logo for "as:paperfirm" on the right.

## Virtual Access Anytime, Anywhere

A Client Account may be established and accessed through our website on any computer, iPhone, Blackberry or any other handheld device with an internet connection.

Note iPhone Users: Add our Frame Legal web clip to your iPhone Home Screen for fast access to our website and your Client Account.

To add our web clip: Open the Frame Legal webpage on your iPhone and tap **+**. Then tap *Add to Home Screen*.



### Step 1

Simply click on the CLIENT LOGIN link on the Frame Legal website to navigate to the Client Account login and registration page.



## Step 2

After you navigate to the Client Account login page, click the white REGISTER link below the LOGIN button.

If you already have a Client Account with Frame Legal you can skip the Registration step. Simply enter your Username and Password to go directly to your secure personal Homepage.

FRAME LEGAL

Please Login.

Enter Username

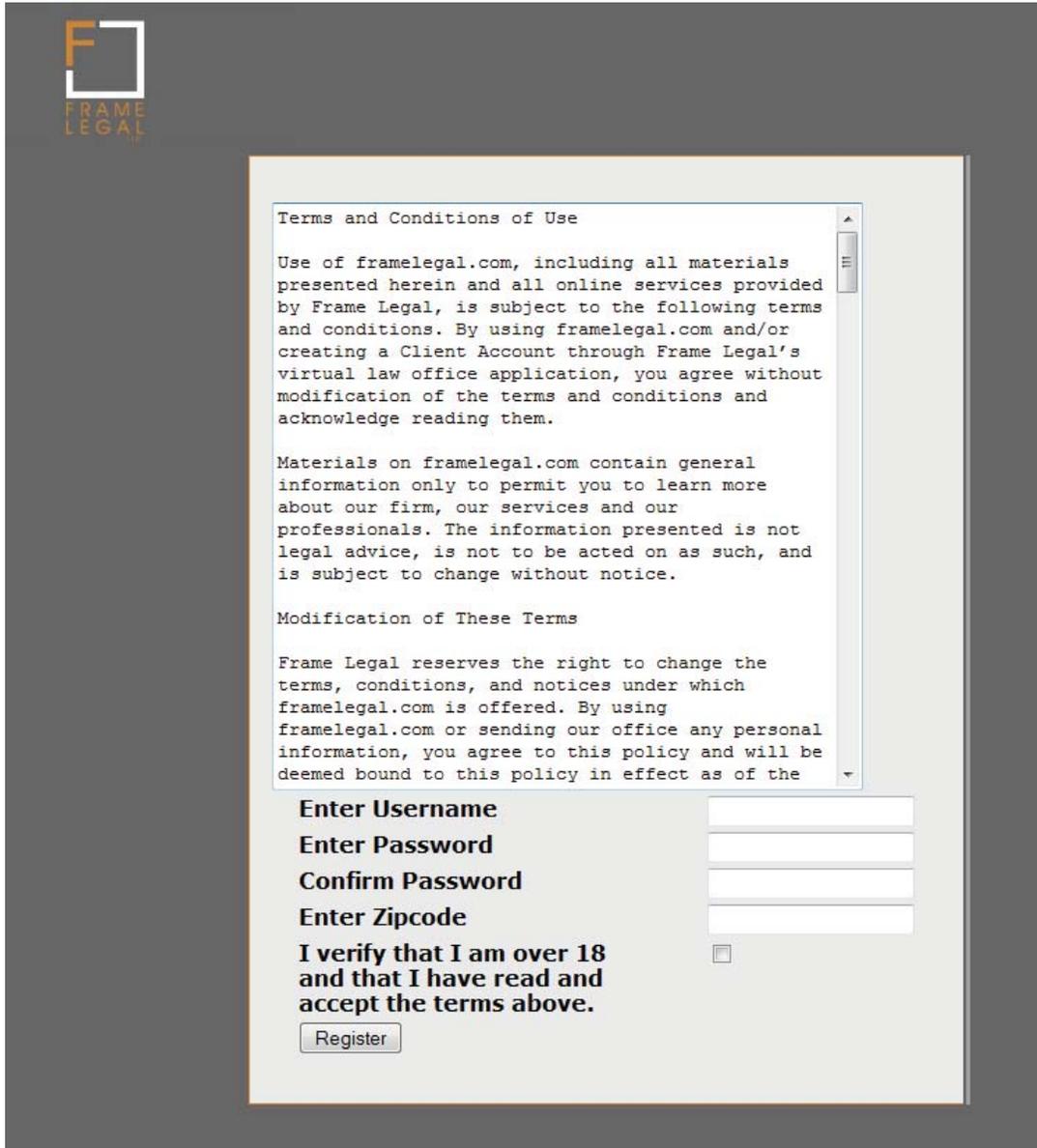
Enter Password

Login

[Register](#)      [Recover Lost Password](#)

## Step 3

After being re-directed to the Registration page, enter your unique password, zip code and verify that you are 18 years old.



**FRAME LEGAL**

**Terms and Conditions of Use**

Use of framelegal.com, including all materials presented herein and all online services provided by Frame Legal, is subject to the following terms and conditions. By using framelegal.com and/or creating a Client Account through Frame Legal's virtual law office application, you agree without modification of the terms and conditions and acknowledge reading them.

Materials on framelegal.com contain general information only to permit you to learn more about our firm, our services and our professionals. The information presented is not legal advice, is not to be acted on as such, and is subject to change without notice.

**Modification of These Terms**

Frame Legal reserves the right to change the terms, conditions, and notices under which framelegal.com is offered. By using framelegal.com or sending our office any personal information, you agree to this policy and will be deemed bound to this policy in effect as of the

**Enter Username**

**Enter Password**

**Confirm Password**

**Enter Zipcode**

**I verify that I am over 18 and that I have read and accept the terms above.**

## RE-LOGIN FOR ADDITIONAL SECURITY

CONGRATULATIONS! You have now successfully created your own secure Client Account with Frame legal. To LOGIN to your Client Account you must re-enter your Username and Password.

**FRAME LEGAL**

Please login to continue the registration process.

This website has jurisdiction to answer questions related only to South Carolina law.

Your user account has been created successfully.

**Enter Username**

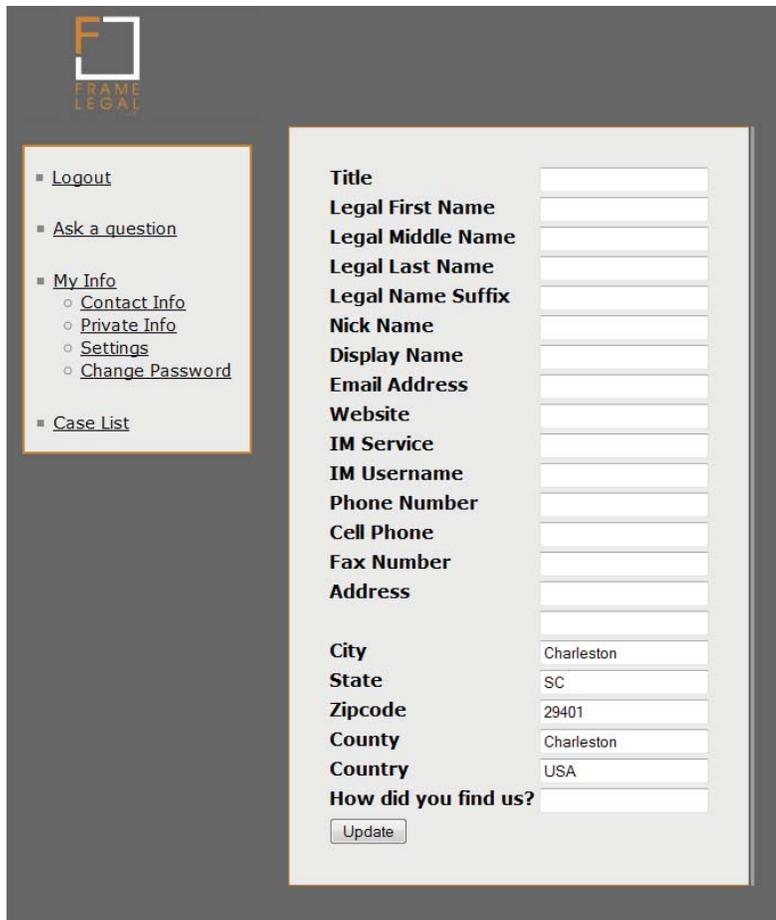
**Enter Password**

[Register](#)      [Recover Lost Password](#)

# 2 Creating A Case With Frame Legal

After you LOGIN to your Client Account for the first time you will be required to enter some personal contact information. This information will be stored under the MY INFO link on the left hand side of the page.

You may update your contact information at any time by clicking the MY INFO link, editing your CONTACT INFO content and clicking on the UPDATE button of the page.



The screenshot displays the Frame Legal client account interface. On the left, there is a navigation menu with the following items:

- Logout
- Ask a question
- My Info
  - Contact Info
  - Private Info
  - Settings
  - Change Password
- Case List

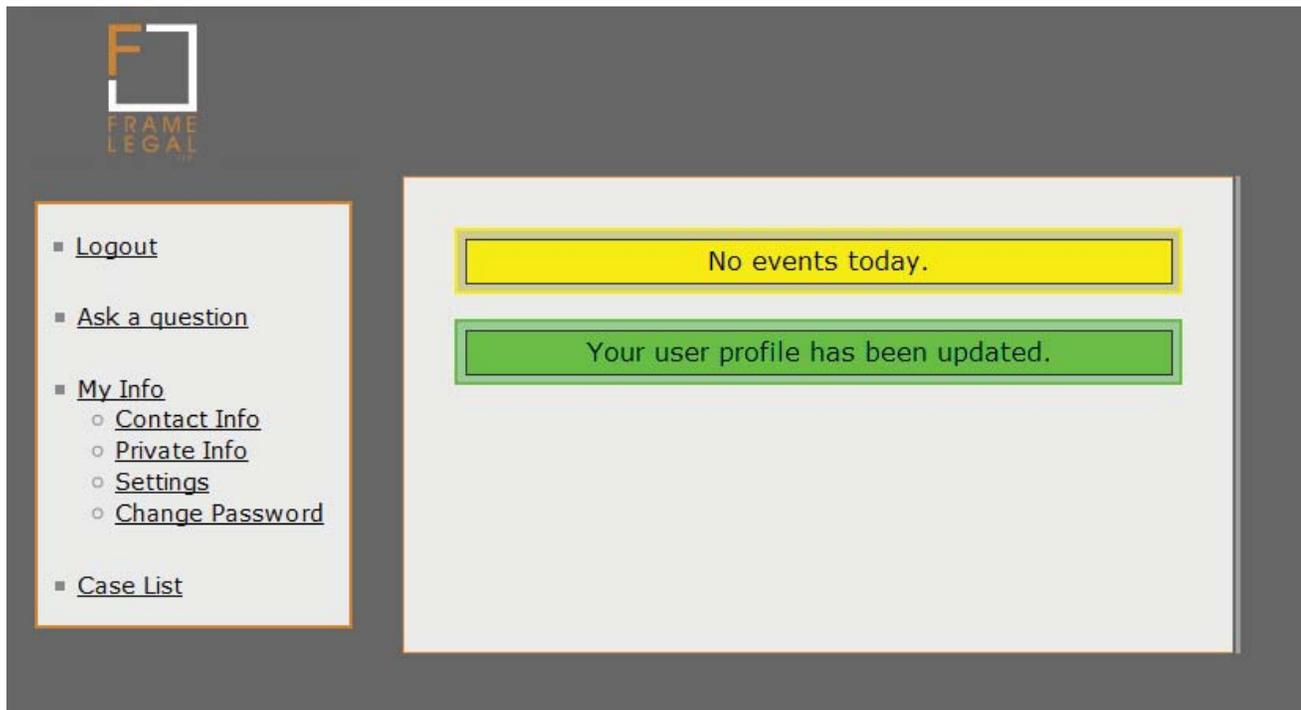
The main content area shows a form for updating contact information. The form fields are as follows:

Title	<input type="text"/>
Legal First Name	<input type="text"/>
Legal Middle Name	<input type="text"/>
Legal Last Name	<input type="text"/>
Legal Name Suffix	<input type="text"/>
Nick Name	<input type="text"/>
Display Name	<input type="text"/>
Email Address	<input type="text"/>
Website	<input type="text"/>
IM Service	<input type="text"/>
IM Username	<input type="text"/>
Phone Number	<input type="text"/>
Cell Phone	<input type="text"/>
Fax Number	<input type="text"/>
Address	<input type="text"/>
City	<input type="text" value="Charleston"/>
State	<input type="text" value="SC"/>
Zipcode	<input type="text" value="29401"/>
Country	<input type="text" value="Charleston"/>
Country	<input type="text" value="USA"/>
How did you find us?	<input type="text"/>

At the bottom of the form is an  button.

## CONTACT INFORMATION

Once you enter in your personal contact information a new page will appear notifying you that your USER PROFILE has been successfully updated.



The screenshot displays a user interface for a client account. On the left side, there is a navigation menu with the following items:

- [Logout](#)
- [Ask a question](#)
- [My Info](#)
  - [Contact Info](#)
  - [Private Info](#)
  - [Settings](#)
  - [Change Password](#)
- [Case List](#)

On the right side, there are two notification boxes:

- A yellow box containing the text: "No events today."
- A green box containing the text: "Your user profile has been updated."

The top left corner of the interface features the logo for "FRAME LEGAL", which consists of a stylized orange and white "F" above the words "FRAME LEGAL" in a sans-serif font.

### PRIVATE INFORMATION

Your PRIVATE INFO page allows you to create more specific information that may be necessary for you attorney to proceed with your case.

While all of your personal information is 100% encrypted, this PRIVATE INFO page is also audited for security reasons. This means that if any of the data contained in these fields is altered, your attorney at Frame Legal will be able to find out who made the changes and when.

**FRAME LEGAL**

- [Logout](#)
- [Ask a question](#)
- [My Info](#)
  - [Contact Info](#)
  - [Private Info](#)
  - [Settings](#)
  - [Change Password](#)
- [Case List](#)

**Access to this information is audited.**

**Security Question**

**Security Answer**

**Birthday**

**Notes**

**Private Field #01**

**Private Field #02**

**Private Field #03**

**Private Field #04**

**Private Field #05**

**Private Field #06**

**Private Field #07**

**Private Field #08**

**Private Field #09**

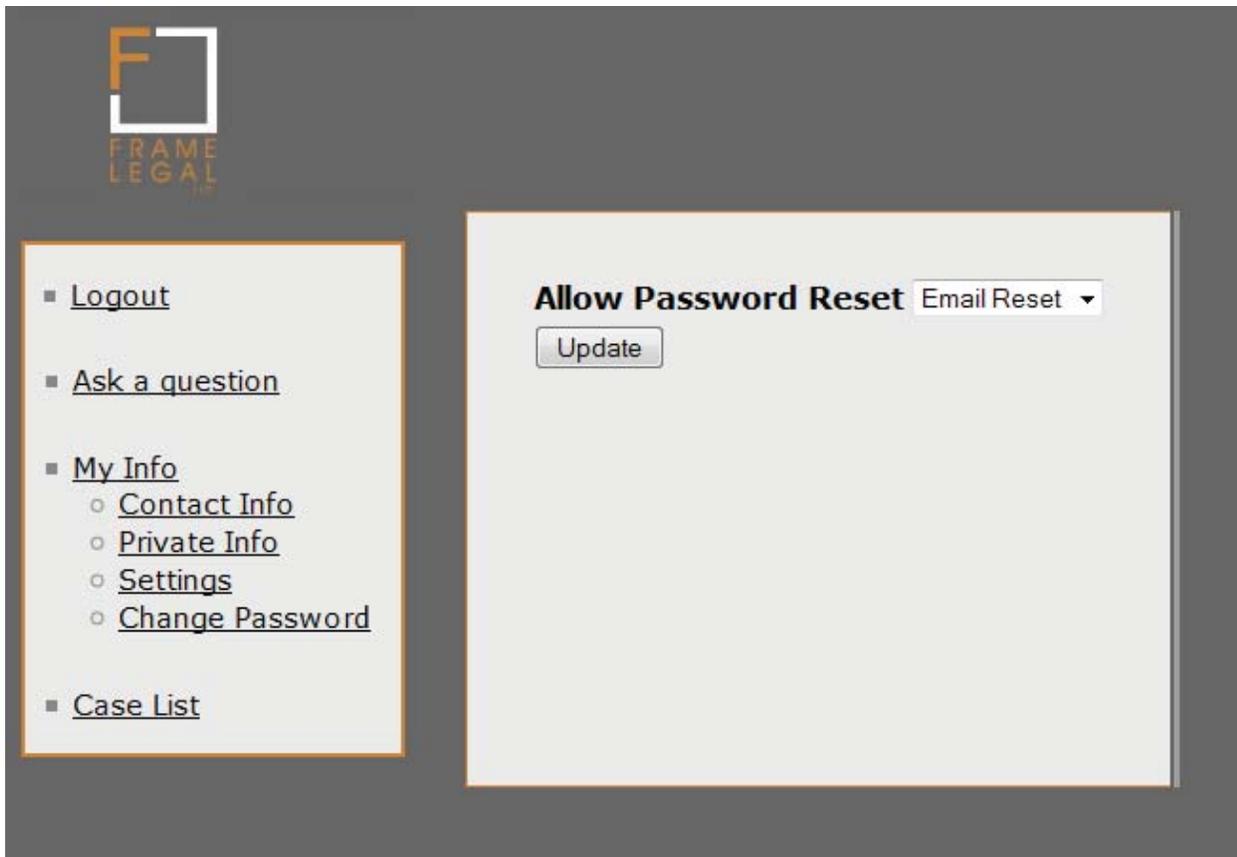
**Private Field #10**

**Private Field #11**

**Private Field #12**

## SETTINGS

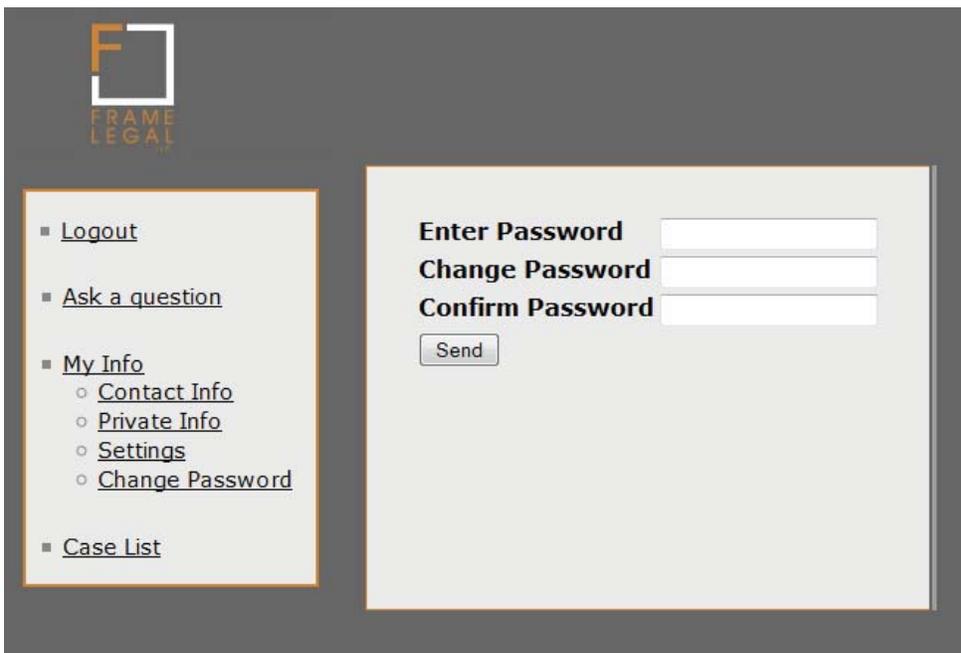
The SETTINGS feature allows you to reset your password manually or via email. If you select the EMAIL RESET option, you will be sent an email to approve your password change.



The screenshot shows the FRAME LEGAL client account interface. In the top left corner is the logo, which consists of a stylized 'F' inside a square frame, with the words 'FRAME LEGAL' underneath. On the left side, there is a navigation menu with the following items: Logout, Ask a question, My Info (with sub-items: Contact Info, Private Info, Settings, Change Password), and Case List. The main content area on the right is titled 'Allow Password Reset' and features a dropdown menu currently set to 'Email Reset' and an 'Update' button below it.

## CHANGE PASSWORD

The CHANGE PASSWORD option allows you to do just that, change your password. Enter in your current password and select a new unique password to change these settings. After typing in your new unique password, confirm the password by re-typing it and clicking the SEND button.



The screenshot displays the Frame Legal client account interface. In the top left corner, there is a logo consisting of a stylized 'F' inside a square, with the words 'FRAME LEGAL' underneath. On the left side, there is a navigation menu with the following items: 

- [Logout](#)
- [Ask a question](#)
- [My Info](#)
  - [Contact Info](#)
  - [Private Info](#)
  - [Settings](#)
  - [Change Password](#)
- [Case List](#)

On the right side, there is a form titled 'Enter Password' with three input fields: 'Enter Password', 'Change Password', and 'Confirm Password'. Below the input fields is a 'Send' button.

## STEP 2

After you have registered and created your secure Client Account you may now consult with a Frame Legal attorney. To consult with a Frame Legal attorney, simply click on the ASK A QUESTION link located on the left hand side of your screen.

**FRAME LEGAL**

- [Logout](#)
- [Ask a question](#)
- [My Info](#)
- [Case List](#)

### Step #1 : Compose and Edit

**Subject**

**Question**

**Email Updates**

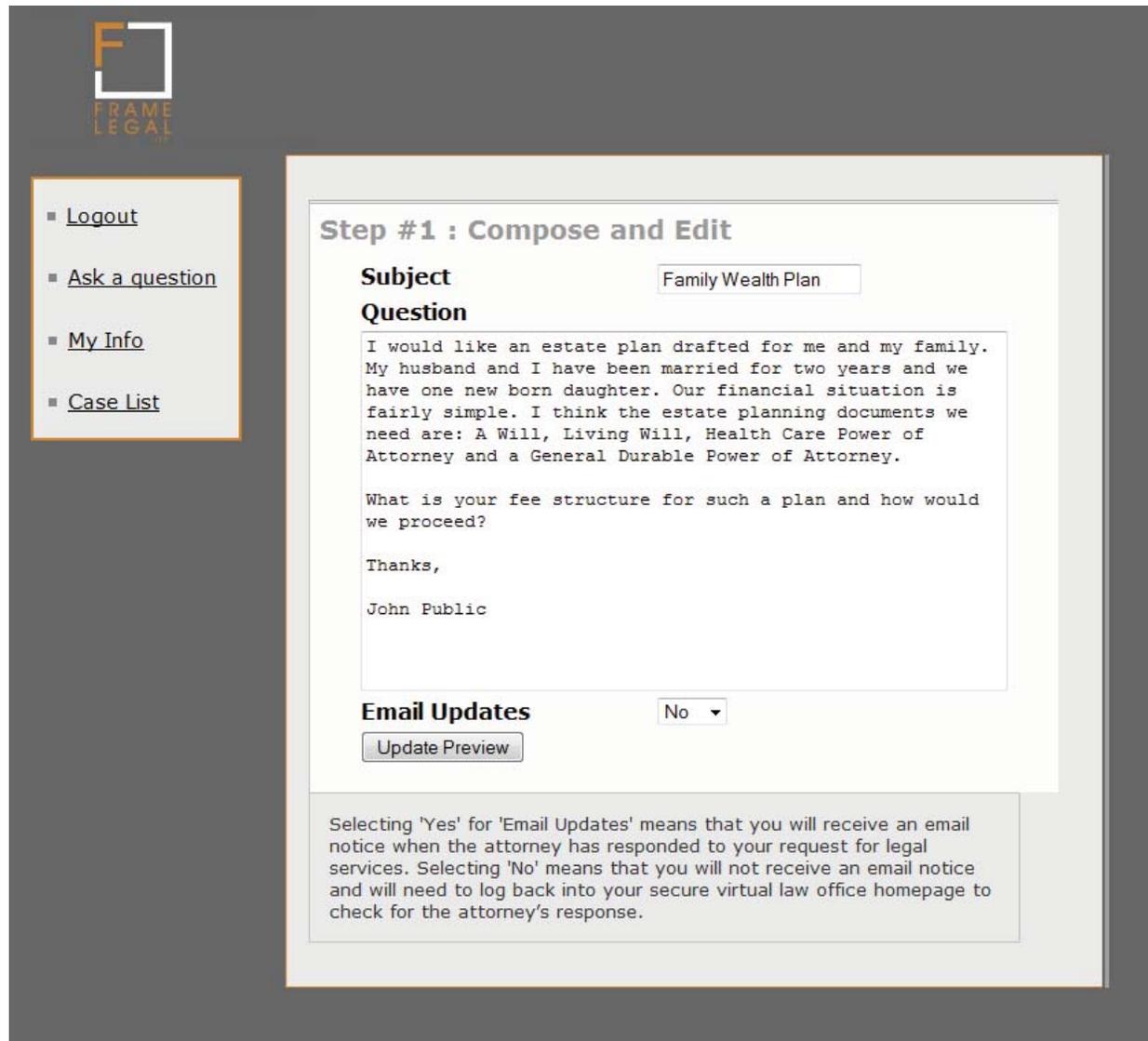
Selecting 'Yes' for 'Email Updates' means that you will receive an email notice when the attorney has responded to your request for legal services. Selecting 'No' means that you will not receive an email notice and will need to log back into your secure virtual law office homepage to check for the attorney's response.

**Important Note:** The only time you will be using the ASK A QUESTION LINK is when you have a NEW legal matter. For example, if you have an ongoing Intellectual Property issue being resolved and then your business needs an executive compensation agreement drafted, you would then use the ASK A QUESTION LINK to create a NEW case.

## STEP 3

Type the subject of the question or legal matter that you have in the SUBJECT AREA. Then type your question or request for legal services in the larger area titled QUESTION.

Note: there is also an EMAIL UPDATE option at the bottom of the page. Choose YES or NO to let your attorney know whether you would like to have EMAIL UPDATES of your case sent to your registered email account.



The screenshot shows a web interface for a client account. On the left is a navigation menu with links for Logout, Ask a question, My Info, and Case List. The main content area is titled 'Step #1 : Compose and Edit' and contains a form for submitting a question. The form has a 'Subject' field with the text 'Family Wealth Plan', a 'Question' text area containing a request for an estate plan and a fee structure question, and an 'Email Updates' dropdown menu set to 'No'. There is an 'Update Preview' button and a footer note explaining the email update options.

**FRAME LEGAL**

- [Logout](#)
- [Ask a question](#)
- [My Info](#)
- [Case List](#)

### Step #1 : Compose and Edit

**Subject**

**Question**

I would like an estate plan drafted for me and my family. My husband and I have been married for two years and we have one new born daughter. Our financial situation is fairly simple. I think the estate planning documents we need are: A Will, Living Will, Health Care Power of Attorney and a General Durable Power of Attorney.

What is your fee structure for such a plan and how would we proceed?

Thanks,

John Public

**Email Updates**

Selecting 'Yes' for 'Email Updates' means that you will receive an email notice when the attorney has responded to your request for legal services. Selecting 'No' means that you will not receive an email notice and will need to log back into your secure virtual law office homepage to check for the attorney's response.

## UPDATE PREVIEW

After you have typed your question or request for legal services, click the UPDATE PREVIEW button at the bottom of the page.

The screenshot displays the JD SUPRA legal services interface. On the left is a navigation menu with the following items: Logout, Ask a question, My Info, and Case List. The main content area is divided into two sections: 'Step #2: Confirm and Send' and 'Step #1: Compose and Edit'. Both sections show a subject of 'Family Wealth Plan' and a question about drafting an estate plan. The 'Step #2' section includes a 'Send' button and 'Email Updates' set to 'N'. The 'Step #1' section includes an 'Update Preview' button and 'Email Updates' set to 'No'.

**FRAME LEGAL**

- Logout
- Ask a question
- My Info
- Case List

**Step #2: Confirm and Send**

**Subject** Family Wealth Plan

**Question**

I would like an estate plan drafted for me and my family. My wife and I have been married for two years and we have one new born daughter. Our financial situation is fairly simple. I think the estate planning documents we need are: A Will, Living Will, Health Care Power of Attorney and a General Durable Power of Attorney.

What is your fee structure for such a plan and how would we proceed?

Thanks,

John Public

**Email Updates** N

Send

**Step #1 : Compose and Edit**

**Subject** Family Wealth Plan

**Question**

I would like an estate plan drafted for me and my family. My wife and I have been married for two years and we have one new born daughter. Our financial situation is fairly simple. I think the estate planning documents we need are: A Will, Living Will, Health Care Power of Attorney and a General Durable Power of Attorney.

What is your fee structure for such a plan and how would we proceed?

Thanks,

John Public

**Email Updates** No

Update Preview

## REVIEW MESSAGE

REVIEW and SEND your message to your attorney at Frame Legal. Before SENDING your message confirm that the message you have typed is correct. If your message has an error, re-type your question or request for legal services. Then click the UPDATE PREVIEW once again to approve your changes.

The screenshot displays the Frame Legal client account interface. At the top left is the Frame Legal logo. A navigation menu on the left includes: Logout, Ask a question, My Info, Case List, and Case View (with sub-options: Refresh, Link Case, Cancel/Resume, View Discussion, View Events, View Files, View Charges, and View Invoices). The main content area features a green notification box stating: "Your new case has been created. An email notification has been sent." Below this, the case details are shown: Subject: Family Wealth Plan, Status: New Case. A "Discussion" section contains a "Message" field with an "Update Preview" button. Below the message field, a user named John Public is shown asking a question on 09/25/2008 at 3:30 PM. The message text reads: "I would like an estate plan drafted for me and my family. My wife and I have been married for two years and we have one new born daughter. Our financial situation is fairly simple. I think the estate planning documents we need are: A Will, Living Will, Health Care Power of Attorney and a General Durable Power of Attorney. What is your fee structure for such a plan and how would we proceed? Thanks, John Public". Below the message is an "Events" section with input fields for "Event Starts", "Ends", and "Description", and an "Update Preview" button. On the right side of the interface, there are three calendar views for September, October, and November.

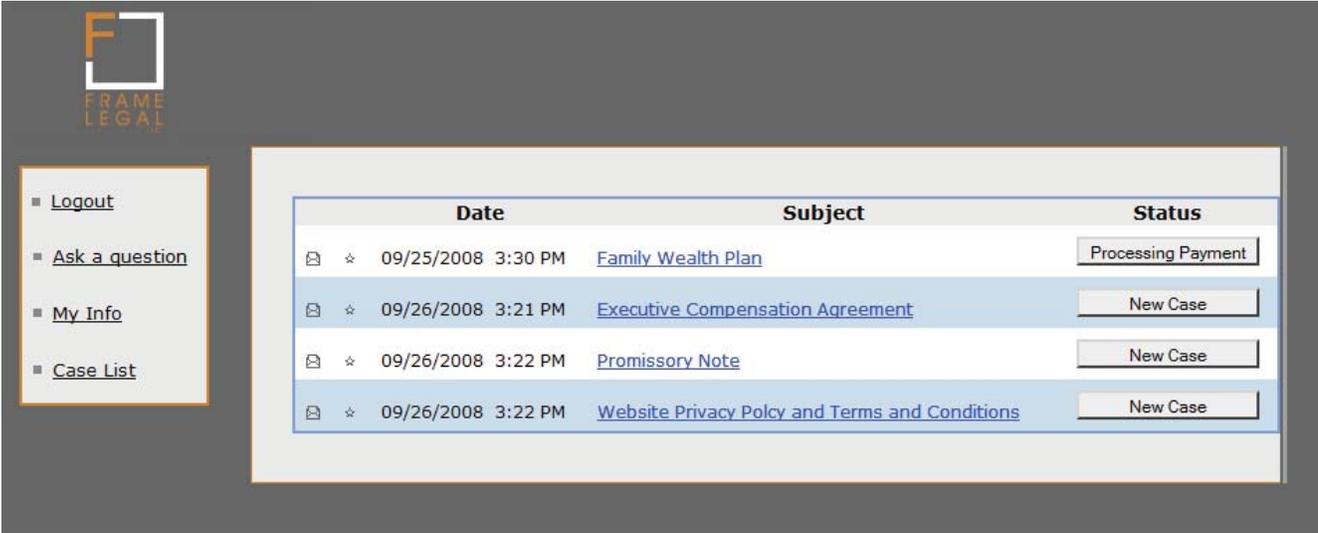
CONGRATULATIONS! You have successfully created your case and an email notification has been sent to an attorney at Frame Legal.

### CASE LIST VIEW

After you establish your Client Account and create your case, each time you LOGIN to your Frame Legal Account click on the CASE LIST link to view your CASE LIST.



Once you are logged in to your Client Account, you may access your CASE LIST at anytime. Simply click on the CASE LIST link and choose your case you wish to view. Additionally, Frame Legal provides you with a STATUS UPDATE feature for each one of your cases.



# 3 Consulting With Your Attorney

## ATTORNEY DISCUSSIONS

Once you have sent your new case to your attorney at Frame Legal, he or she will respond to your question or request for legal services **WITHIN 24 HOURS**. When your attorney responds, you will see his or her response appear above your request in a **GREEN** shaded text box.

The screenshot displays the Frame Legal client account interface. On the left is a navigation menu with options like Logout, Ask a question, My Info, Case List, and Case View. The main content area shows a discussion for the subject 'Family Wealth Plan' with a status of 'Quote In Progress'. A yellow callout box points to a 'Click here to see file list for this case.' link. The discussion includes a message from Kelly Frame dated 09/25/2008 at 3:47 PM, which is highlighted in green. Her message congratulates John on the birth of his daughter and offers legal services. Below it is a question from John Public dated 09/25/2008 at 3:30 PM, highlighted in purple, asking for an estate plan. On the right side, there are three calendar views for September, October, and November.

**September**

	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

**October**

			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

**November**

						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

**Navigation Menu:**

- Logout
- Ask a question
- My Info
- Case List
- Case View
  - Refresh
  - Link Case
  - Cancel/Resume
  - View Discussion
  - View Events
  - View Files
  - View Charges
  - View Invoices

**Discussion Details:**

**Subject:** Family Wealth Plan  
**Status:** Quote In Progress

**Discussion**

**Message**

Update Preview

**Kelly Frame said:** on 09/25/2008 3:47 PM [view](#)

John,

Congratulations on the birth your daughter! With this wonderful addition, we know that the years ahead will be bright and happy ones for everyone in your family.

Our firm welcomes the opportunity to discuss how we can assist you and your family with your estate plan.

I have uploaded four documents to your Client Account. The first file you will find our Firm Brochure for your review. I hope this will help you gain a better understanding of who we are and what legal services we ... [read full text](#)

**John Public asked:** on 09/25/2008 3:30 PM [view](#)

I would like an estate plan drafted for me and my family. My wife and I have been married for two years and we have one new born daughter. Our financial situation is fairly simple. I think the estate planning documents we need are: A Will, Living Will, Health Care Power of Attorney and a General Durable Power of Attorney.

What is your fee structure for such a plan and how would we proceed?

Thanks,

## READ FULL DISCUSSION THREAD

Additionally, if you find that a DISCUSSION THREAD runs beyond the area provided, click on the BLUE link titled READ FULL TEXT. You will then be re-directed to a new page with the entire text displayed.



- [Logout](#)
- [Ask a question](#)
- [My Info](#)
- [Case List](#)
- [Case View](#)
  - [Refresh](#)
  - [Link Case](#)
  - [Cancel/Resume](#)
  - [View Discussion](#)
  - [View Events](#)
  - [View Files](#)
  - [View Charges](#)
  - [View Invoices](#)

Kelly Frame said: on 09/25/2008 3:47 PM

John,

Congratulations on the birth your daughter! With this wonderful addition, we know that the years ahead will be bright and happy ones for everyone in your family.

Our firm welcomes the opportunity to discuss how we can assist you and your family with your estate plan.

I have uploaded four documents to your Client Account. The first file you will find our Firm Brochure for your review. I hope this will help you gain a better understanding of who we are and what legal services we provide at Frame Legal. The second file is a Family Wealth Inventory and Assessment Worksheet for you and your wife to complete at your convenience. The third file is our fee schedule. This should give you a general idea of our fee structure. And finally, I have uploaded a Client Account Manual to help answer any questions you might have with respect to your Client Account. Please remember, all information provided by you is strictly confidential.

When you complete your worksheet please send it to us through your Client Account for our review. We will then contact you within three days to schedule a meeting to explain your estate planning options. We can have our meeting in person, by video conference, or by phone. Whichever is most convenient for you. During our meeting we will also discuss a fee that is agreeable to you.

On behalf of all of us at Frame Legal, I extend the best wishes to you, your wife, and your daughter.

Kelly

## DOWNLOADING FILES

If your attorney has uploaded any files for your review, you will find these files at the bottom of the screen. Simply click on the title of the document, underlined in BLUE, and you will be prompted to either view the document or download the document to your computer or handheld device.

### Files

- Kelly Frame uploaded a 25 KB file: on 09/25/2008 3:51 PM  
F [Frame Legal Client Account Manual](#)
- Kelly Frame uploaded a 25 KB file: on 09/25/2008 3:50 PM  
F [Frame Legal Fee Schedule](#)
- Kelly Frame uploaded a 25 KB file: on 09/25/2008 3:50 PM  
F [Frame Legal Family Wealth Inventory and Assessment](#)
- Kelly Frame uploaded a 25 KB file: on 09/25/2008 3:49 PM  
F [Frame Legal Firm Brochure](#)

## UPLOADING FILES

Additionally, if your attorney has requested additional information from you before he or she can proceed with your case, you may provide the information by uploading files through your Client Account. The FILE UPLOAD area will be located below your attorney-client discussions and above any existing files that have been previously uploaded. The information you provide through your Client Account is encrypted and 100% secure.

### Files

Title

Upload File

Browse...

Upload

John Public uploaded a 25 KB file: on 09/25/2008 5:21 PM

F

[Completed Family Wealth Inventory and Assessment](#)

Kelly Frame uploaded a 25 KB file: on 09/25/2008 3:51 PM

F

[Frame Legal Client Account Manual](#)

Kelly Frame uploaded a 25 KB file: on 09/25/2008 3:50 PM

F

[Frame Legal Fee Schedule](#)

Kelly Frame uploaded a 25 KB file: on 09/25/2008 3:50 PM

F

[Frame Legal Family Wealth Inventory and Assessment](#)

Kelly Frame uploaded a 25 KB file: on 09/25/2008 3:49 PM

F

[Frame Legal Firm Brochure](#)

## CLIENT DISCUSSIONS

All of your discussions, files and any other correspondence will appear in a BLUE shaded area or text box.



- [Logout](#)
- [Ask a question](#)
- [My Info](#)
- [Case List](#)
- [Case View](#)
  - [Refresh](#)
  - [Link Case](#)
  - [Cancel/Resume](#)
  - [View Discussion](#)
  - [View Events](#)
  - [View Files](#)
  - [View Charges](#)
  - [View Invoices](#)

Click here to see file list for this case.

An email notification was sent recently.

A new file has been created.

Your file has been uploaded.

**Subject** Family Wealth Plan

**Status** Quote In Progress

**Discussion**

**Message**

 **John Public** said: on 09/25/2008 5:20 PM [view](#)

Kelly,

Thank you very much for getting back to me so quickly. I received your files, including the Wealth Inventory Assessment worksheet, and my wife and I will fill it out as soon as possible. I will upload it to my account as soon as we're finished.

Best,

John

**September**

	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

**October**

		1	2	3	4
5	6	7	8	9	10
11	12	13	14	15	16
17	18	19	20	21	22
23	24	25	26	27	28
29	30	31			

**November**

						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

## CASE STATUS UPDATES

Each time you send a message to Frame Legal or upload a file, a CASE STATUS UPDATE will appear at the top of you Client Account.

The screenshot shows the Frame Legal client account interface. At the top left is the Frame Legal logo. To its right is a yellow sticky note that says "Click here to see file list for this case." Below the logo is a navigation menu with items: Logout, Ask a question, My Info, and Case List. The main content area features three notification boxes: a yellow one stating "An email notification was sent recently.", and two green ones stating "A new file has been created." and "Your file has been uploaded." On the right side, there is a calendar for the month of September, with the 25th highlighted in orange.

## YELLOW STICKY NOTE NOTIFICATIONS

You will notice that at the top of your Client Account YELLOW STICKY NOTES will notify you when recent case information has been updated or if there is a file available for you to download from your attorney.

This screenshot shows the Frame Legal client account interface with three yellow sticky notes at the top. The notes contain the following text: "Click here to see the event for today.", "Click here to see recent case info.", and "Click here to see file list for this case." Below the sticky notes, the main content area displays case details: "Subject: Family Wealth Plan" and "Status: Quote In Progress". There is also a "Discussion" section. The navigation menu on the left includes Logout, Ask a question, and My Info. On the right, a calendar for September is shown with the 25th highlighted in orange.

## SCHEDULED MEETINGS AND EVENT NOTIFICATION

If your attorney has scheduled a meeting with you or some other event that is to take place that day, you will automatically be reminded of this event when you LOGIN to your Client Account. Additionally, if you selected to receive case status updates via email you will be automatically be notified.

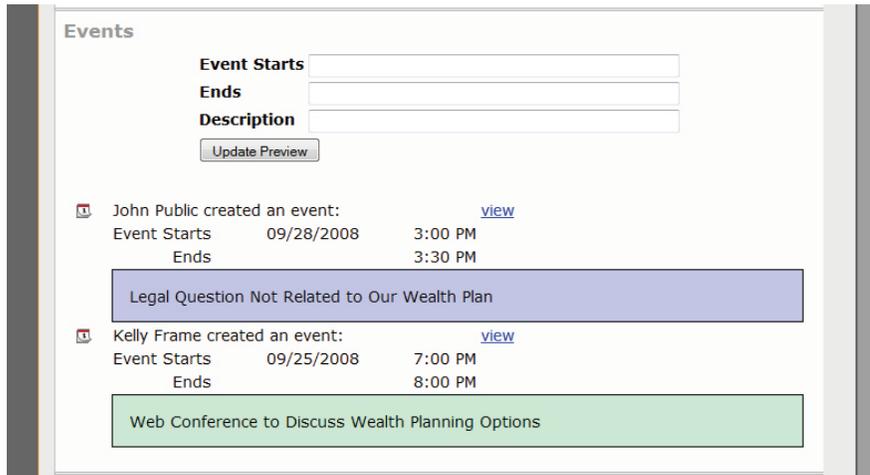
You may use the EVENTS feature to add an event to your CALENDAR that is related, or not related, to the question or matter contained in your specific case.



## EVENTS

Any event added will be visible to your attorney reviewing your case. For example, if you would like to schedule an appointment for a telephone or web conference with your attorney, enter the date and time you would like for this event to take place, such as September 28, 2008 at 3:00 PM and ending September 28, 2008 at 3:30 PM. Next to the DESCRIPTION box, type the nature of the appointment.

You will then be able to preview the update to the Calendar before it is posted.



## CALENDAR

If the EVENT falls within the current month or the next, the CALENDAR on the right hand side of your Client Account will show the date of your item highlighted in BLUE. If you click on the BLUE date, the link will take your to the description and information about that item. Once you are viewing the item, you may click on VIEW to edit or delete the scheduled CALENDAR item. The attorney handling your case will be able to view the CALENDAR and any entries you made to it.

The image shows a vertical scrollable calendar interface. It contains three monthly grids. The first grid is for September, with dates 1 through 30. The date 25 is highlighted in blue. The second grid is for October, with dates 1 through 31. The third grid is for November, with dates 1 through 30. The calendar is presented in a clean, grid-based format with a light gray background and dark text.

September						
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

October						
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

November						
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

# 4 Payment And Billing Features

Payment for legal services will depend on the agreement you established with your attorney at the beginning of your case. There are a number of billing options that may be assigned by the attorney and he or she will make that information available to you before proceeding with handling your legal matter.

The screenshot displays the JD SUPRA client account interface. At the top, there are three yellow callout boxes with instructions: 'Click here to see the event for today.', 'Click here to see recent case info.', and 'Click here to see file list for this case.' The main content area shows a case titled 'Family Wealth Plan' with a 'Status' of 'Review Quote'. Below this is a 'Discussion' section containing a 'Message' from Kelly Frame, dated 09/25/2008 at 6:48 PM. The message text is as follows:

John,

It was a great meeting with you and your family tonight. I want to take this opportunity to personally thank you for selecting me to draft your Estate Plan. We appreciate your continued trust and confidence in Frame Legal, and we will do our utmost to continue to earn it.

As we discussed, the firm will handle this matter for the fixed fee of \$875. All other aspects of our most current engagement letter will remain in effect.

The members of the team that will be working on your fa ...  
[read full text](#)

On the right side of the interface, there are three calendar views for September, October, and November. The September calendar shows the 25th as the current date. The October and November calendars show the 1st as the current date.

On the left side, there is a navigation menu with the following items: Logout, Ask a question, My Info, Case List, Case View (with sub-items: Refresh, Link Case, Cancel/Resume, View Discussion, View Events, View Files, View Charges, View Invoices).

## REVIEW QUOTE

If your attorney has provided a price quote for services, there will be a button titled REVIEW QUOTE. Click on REVIEW QUOTE to view the terms and conditions provided by your attorney and your attorney's message regarding price. If you agree to the terms and conditions and the price quote provided, click on the ACCEPT button.



- [Logout](#)
- [Ask a question](#)
- [My Info](#)
- [Case List](#)
- [Case View](#)
  - [Refresh](#)
  - [Link Case](#)
  - [Cancel/Resume](#)
  - [View Discussion](#)
  - [View Events](#)
  - [View Files](#)
  - [View Charges](#)
  - [View Invoices](#)

**Disclaimer**

**TERMS AND CONDITIONS:**  
 This quote includes only the legal services that are expressly agreed upon in writing by you and Frame Legal. Once you have accepted the quote the legal services requested will be provided. Typically this means that the requested document or answer will be prepared and will be made available to you once your payment is complete. If the services agreed upon do not require the preparation of a legal document, but instead are for legal consultation, once payment is received you will be entitled to consultation with an attorney as needed either through this website or by phone regarding the agreed upon issue(s) and for the agreed upon length of time.

**Case Quote**                      Fixed Price + Expenses

**Message**

John,

It was a great meeting with you and your family tonight. I want to take this opportunity to personally thank you for selecting me to draft your Estate Plan. We appreciate your continued trust and confidence in Frame Legal, and we will do our utmost to continue to earn it.

As we discussed, the firm will handle this matter for the fixed fee of \$875. All other aspects of our most current engagement letter will remain in effect.

The members of the team that will be working on your family's estate plan include myself and Rae Phillips. Please feel free to contact us through your Client Account, email or call for any questions or concerns you may have.

Again, thank you for this opportunity to be of service.

Kelly

### ACCEPT QUOTE

You will be notified that the case quote was accepted and the status of your case is IN PROGRESS. Your attorney will then notify you of the next steps or when your requested legal services are completed.

Click here to see the event for today.

Click here to see file list for this case.

**Case quote has been accepted.**

**Subject** Family Wealth Plan

**Status** In Progress

**Discussion**

**Message**

September						
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

October						
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

### INVOICES

When an INVOICE for legal services is due, a YELLOW STICKY NOTE will appear above your case notifying you.

Click here to see the event for today.

Payment due. Click here to pay now.

Click here to see recent case info.

Click here to see file list for this case.

**Subject** Family Wealth Plan

**Status**

**Discussion**

September						
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

October						
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

## VIEWING INVOICE

You may click on [VIEW INVOICES](#) to view the details of your invoice.

**FRAME LEGAL**

- Logout
- Ask a question
- My Info
- Case List
- Case View
  - Refresh
  - Link Case
  - Cancel/Resume
  - View Discussion
  - View Events
  - View Files
  - View Charges
  - View Invoices

**Invoiced** on 09/25/2008 7:29 PM **Total** **\$905.00**

John,

**Memo**  
 This is your final invoice for legal services rendered. It was an absolute pleasure assisting you and your family. If you have any questions or concerns please do not hesitate to contact us through your Client Account, email or by phone.

Very truly yours,  
 Kelly

**Invoice Items:**

Description	Amount	Date	Time
Invoice item for \$0.00	\$0.00	09/25/2008	3:47 PM
15h 00m Management/Discussion			
Invoice item for \$0.00	\$0.00	09/25/2008	3:49 PM
00h 00m File Upload			
Invoice item for \$0.00	\$0.00	09/25/2008	3:50 PM
00h 00m File Upload			
Invoice item for \$0.00	\$0.00	09/25/2008	3:50 PM
00h 00m File Upload			
Invoice item for \$0.00	\$0.00	09/25/2008	3:51 PM
00h 00m File Upload			
Invoice item for \$0.00	\$0.00	09/25/2008	6:02 PM
15h 00m Management/Discussion			
Invoice item for \$0.00	\$0.00	09/25/2008	6:04 PM
00h 00m Calendar Event			
Invoice item for \$0.00	\$0.00	09/25/2008	6:48 PM
15h 00m Management/Discussion			
Invoice item for \$30.00	\$30.00	09/25/2008	7:08 PM
03h 00m Expense/Charge			
Invoice item for \$875.00	\$875.00	09/25/2008	7:26 PM
15h 00m Management/Discussion			

## VIEWING CHARGES

You may click on [VIEW CHARGES](#) to view the details of your charges.

**FRAME LEGAL**

- Logout
- Ask a question
- My Info
- Case List
- Case View
  - Refresh
  - Link Case
  - Cancel/Resume
  - View Discussion
  - View Events
  - View Files
  - View Charges
  - View Invoices

° Kelly Frame added an expense of **\$30.00** on 09/25/2008 7:08 PM

Additional Leather Bound Portfolio for Wealth Planning Documents.

## PAYING INVOICE

Clicking on the YELLOW STICKY NOTE, or clicking the PAY INVOICE button, will take you to your invoice.

The screenshot shows the Frame Legal client account interface. On the left is a navigation menu with the following items: Logout, Ask a question, My Info, Case List, and Case View. Under Case View, there are sub-links: Refresh, Link Case, Cancel/Resume, View Discussion, View Events, View Files, View Charges, and View Invoices. The main content area is titled 'Step #1 : Compose and Edit' and contains the following form fields:

- Invoice Due:** \$905.00
- Payment Method:** PayPal
- Update Preview** button

## PAYPAL

You may pay your INVOICE via PAYPAL or by CERTIFIED CHECK. If you choose to pay your INVOICE via PAYPAL you must have an existing account. Simply select the PAYPAL option and click UPDATE PREVIEW button. Enter a DESCRIPTION of your choosing for your PAYPAL accounting and click SEND. You will then be re-directed to PAYPAL.

The screenshot shows the Frame Legal client account interface. On the left is the same navigation menu as in the previous screenshot. The main content area is titled 'Step #1 : Compose and Edit' and contains the following form fields:

- Description:** Frame Legal
- Amount:** 905.00
- Send** button

A yellow sticky note is overlaid on the form, containing the text: "You are being redirected to PayPal. Once you have completed your payment you will be returned to your account."

## PAYPAL RE-DIRECT

After you have been re-directed to PAYPAL, simply LOGIN and finalize your payment with whichever payment method you choose. Once you have sent payment to Frame Legal, you will then be prompted with an option to return to your Frame Legal Client Account.

**Frame Legal** **Total: \$905.00 USD**

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**PayPal is the safer, easier way to pay** 

**Why use PayPal?**

- Use your credit card online without exposing your card number to merchants.
- Speed through checkout. No need to enter your card number or address.

**Don't have a PayPal account?**  
Use your credit card or bank account (where available). [Continue](#)



**LOG IN TO PAYPAL**

Email:

Password:

[Log In](#)

[Forgot email](#) or [password?](#)

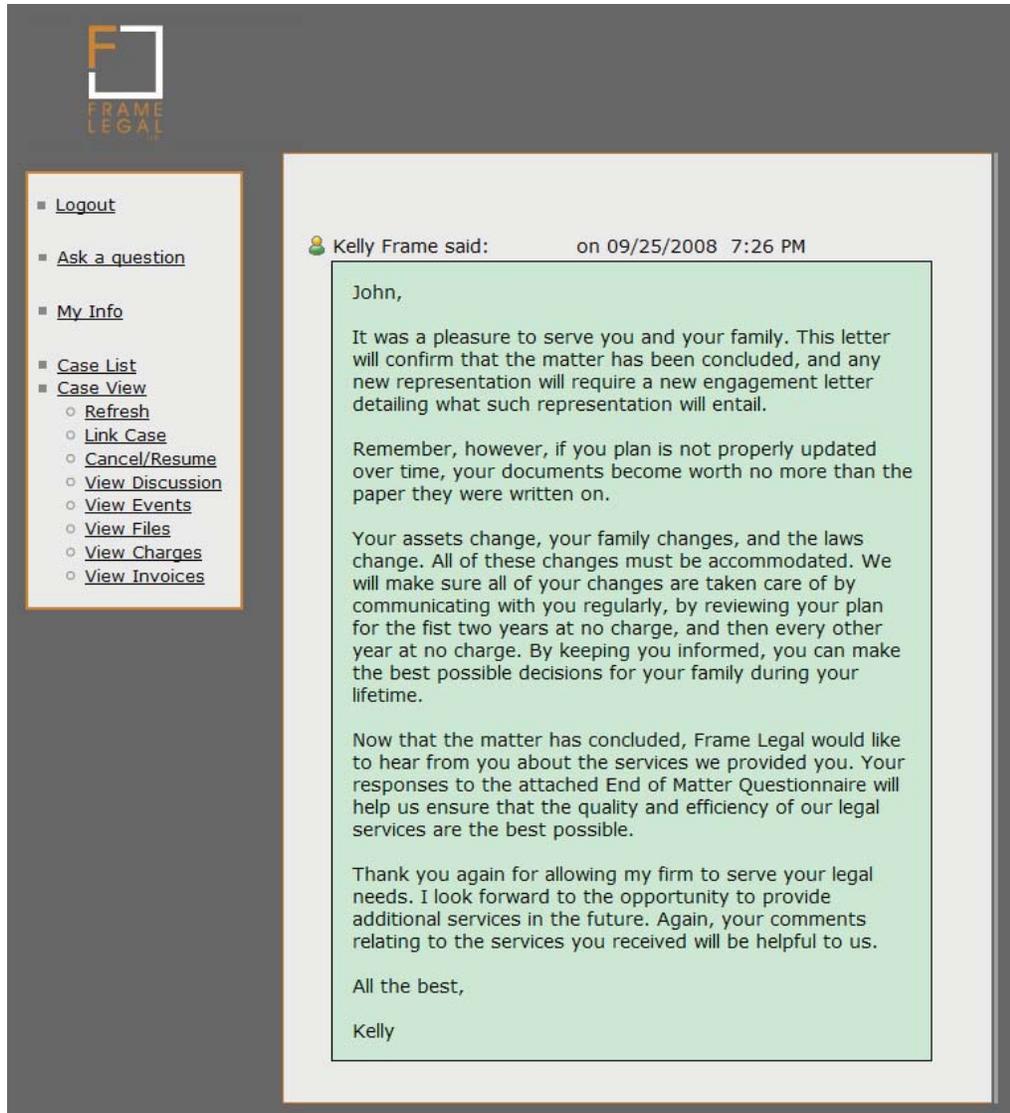
PayPal. The safer, easier way to pay.  
For more information, read our [User Agreement](#) and [Privacy Policy](#).



## END OF MATTER QUESTIONNAIRE

After Frame Legal receives payment, your case is concluded. Your attorney will send you a notification to your Client Account and ask you to respond to an End of Matter Questionnaire. Your responses are greatly appreciated as we work hard to ensure that the quality and efficiency of our legal services are the best possible.

Although your matter has concluded, your Client Account will remain active for a period of time. You may access your documents and attorney-client discussions anytime.



The screenshot displays a client account interface. On the left is a navigation menu with the following items: Logout, Ask a question, My Info, Case List, Case View (with sub-items: Refresh, Link Case, Cancel/Resume, View Discussion, View Events, View Files, View Charges, View Invoices), and My Info. The main content area shows a message from Kelly Frame dated 09/25/2008 at 7:26 PM. The message text is as follows:

John,

It was a pleasure to serve you and your family. This letter will confirm that the matter has been concluded, and any new representation will require a new engagement letter detailing what such representation will entail.

Remember, however, if you plan is not properly updated over time, your documents become worth no more than the paper they were written on.

Your assets change, your family changes, and the laws change. All of these changes must be accommodated. We will make sure all of your changes are taken care of by communicating with you regularly, by reviewing your plan for the first two years at no charge, and then every other year at no charge. By keeping you informed, you can make the best possible decisions for your family during your lifetime.

Now that the matter has concluded, Frame Legal would like to hear from you about the services we provided you. Your responses to the attached End of Matter Questionnaire will help us ensure that the quality and efficiency of our legal services are the best possible.

Thank you again for allowing my firm to serve your legal needs. I look forward to the opportunity to provide additional services in the future. Again, your comments relating to the services you received will be helpful to us.

All the best,

Kelly

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