



THE LAW FIRM OF
EVAN H. FARR, P.C.
 10640 MAIN STREET, SUITE 200
 FAIRFAX, VIRGINIA 22030

PHONE: 703-691-1888
 FAX: 703-691-3061

WWW.FARRLAWFIRM.COM
 WWW.VIRGINIAELDERLAW.COM
 WWW.VIRGINIAESTATEPLANNING.COM

ATTORNEYS AT LAW*
 EVAN FARR (VA & DC)
 DEAN ANDERSON (VA)
 TIM BARKLEY (MD)

PARALEGALS
 APRIL BLUM
 KAREN SIMPSON
 CONNIE VINT

EDUCATION & OUTREACH
 LINDSEY BERKEY

AGENDA FOR THE INITIAL CONSULTATION

Purpose: Get acquainted, determine your goals and objectives, and ascertain if we can help you achieve them.

1. Introductions and sharing of our “stories.”
 - a. Your story, including your family background, your concerns, and your goals and objectives.
 - b. My story, including my background, our firm philosophy, and how we handle cases.
2. Discussion of whether our firm can help you achieve your goals and objectives and whether there is a fit between you and our firm.
 - a. If there is not a fit, we will be happy to make a referral to another firm that might be better able to meet your needs.
 - b. If we both feel there is a fit, we will determine which of our Planning Levels is right for you, and we will discuss our process under that Planning Level. Fees will also be explained, discussed, and agreed upon at this time.
3. Once your needs have been determined and the Planning Level agreed upon, if time permits we can start designing your personal plan to meet your specific goals and objectives.
 - a. Analysis of your present plan, if any.
 - b. Design of your new plan (this stage may carry over into a subsequent meeting depending on the Planning Level and time constraints).
4. Schedule your next appointment. Appointment Date and Time: _____

Your Action Items:	Your Notes:

* Evan Farr is a Certified Elder Law Attorney (National Elder Law Foundation) and a Certified Estate Advisor (National Association of Financial & Estate Planning). Dean Anderson is an Associate Attorney. Tim Barkley is Of Counsel to the firm. Virginia has no procedure for approving certifying organizations.