



# Edward Olkovich Law

Certified Specialist, Estates and Trust Law

## What's the Key Moment in Every Relationship?

The answer is every moment is important. That's why you will always receive professional service from my office.

I look forward to working with you. Please review this Welcome Memo to help us get started. You'll find answers to many frequently asked questions.

## Answers to Frequently Asked Questions

### Q: What are Ed's qualifications?

I was one of the first lawyers certified as an Estates & Trusts Specialist in 2004.

My professional credentials include:

- ✓ Sitting on the Law Society's specialty board certifying all Ontario legal specialists
- ✓ Editing Carswell's legal textbook, *Compensation and Duties of Estate Trustees, Guardians and Attorneys*
- ✓ Writing estate books including two books in the series of *Complete Idiot's Guides® for Canadians*, ***Executor Kung Fu*** and ***Estate to the Heart***
- ✓ Instructing the Bar Admission Course for the Law Society of Upper Canada in Estate Planning, Tax and Business of Law
- ✓ Operating my own law firm since 1978
- ✓ Serving as past chair of the Ontario Bar Association's Law Practice Management and General Practice Sections and member of the Estates and Trusts Section
- ✓ Founding chair of Make-A-Will Week and co-chair of Make-A-Will Month campaigns for Ontario
- ✓ Speaking to professional and public groups across Canada
- ✓ Frequently quoted in national publications as an estate expert

### Q: What can I expect?

As a Certified Specialist, I take advanced education courses each year. This ensures you receive the best service. You will always receive:

- confidential and courteous service at all times
- independent and practical advice you can understand
- an explanation of your legal alternatives to make the best decisions
- resolution to any problem in a timely fashion

**Edward Olkovich Law Professional Corporation**

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**Q: What is the office set up?**

**Darlene**...Law Clerk, supports Ed in will, estate, litigation and real estate needs (ext. 222)

**Patricia**...Law Clerk, supports Ed in estate and litigation needs (ext. 225)

**Adam Olkovich**, BA, MA, supports Ed's websites and publications

**Ed Olkovich**, BA, LLB, CS, TEP, provides legal advice (ext. 224)

**Q: What are the office hours?**

Monday through Friday 9:00 a.m. to 5:00 p.m., except on Wednesdays and Fridays when the office closes at 4:00 p.m. All appointments and documents are signed at my office during these hours.

You may park in front of the two garages on-site.

**Q: Can I use email?**

Email and cell phones are not secure or confidential. Please send me an email advising my office to use email to communicate with you.

I cannot give legal advice or answer legal questions by email. There are misunderstandings and problems with confidentiality.

Email is not always reliable or received. You cannot give me instructions by email. You must confirm my office received important emails if you require a reply. No solicitor-client relationship exists unless an agreement for professional services has been signed and a deposit for fees received.

**Q: How do I make an appointment?**

Whenever you need advice, please make an appointment. This is important to ensure you obtain the desired results.

All appointments must be confirmed by my office.

**Q: What about legal fees?**

Legal fees are often a mystery to clients. If I don't discuss my fees as soon as possible, some clients feel uncomfortable. If I discuss my fees too quickly, some may think that's all I care about.

So let's clear the air.

I care about you as a client and about building a reputation as your trusted advisor. I will discuss up front what things will cost.

**Q: How much will you charge?**

I am reasonable when charging fees. Some professionals may offer you lower fees but without the same experience, results or level of service.

My fees are designed to provide you with the level of service you require.

I will try to avoid any billing surprises.

**Q: How often will you bill me?**

Please feel free to ask questions at any time about any billing matter.

When you hire me, I will require you to sign a fee agreement. This is called a retainer agreement. I will specify what I will do for you and how you will be billed.

What if you are not satisfied with any fees? We can discuss this. You have the right to have fees assessed by a court officer.

**Q: What are your hourly rates?**

My current hourly rate as a Certified Specialist is \$650.00 per hour. This is based on my 35 years' experience. You will receive personal attention many larger law firms do not offer.

Your decision to hire a lawyer should not be based on only one factor. It may be a mistake to hire a lawyer based on a low hourly rate.

**Q: Will I receive a fee estimate?**

Please request details about my fees for:

1. Estate work - helping executors probate and settle estates
2. Estate lawsuits - seeking legal remedies from an estate
3. Estate planning - preparing wills and powers of attorney

Not all fees can be estimated in advance. Government taxes (HST) and disbursements will be added to all fee estimates.

**Q: When will you start work?**

Before I can begin I will need:

- a) your photo identification for my file;
- b) a deposit for my fees; and
- c) a conflict check to be done.

I will then ask you to sign a retainer agreement to hire my firm.

**Q: Why do you need photo identification from me?**

The Law Society requires me to keep a copy of your photo identification on file. This happens when I receive a deposit for fees. I am required to have your address, telephone number and occupation.

You must bring acceptable photo identification (passport, driver's licence, photo health card) to our first meeting.

I cannot open a file and start working for you until I have been retained.

**Q: What about conflicts of interest?**

I must confirm no conflict of interest exists before I act for you.

If more than one person hires me, this is a joint retainer. The Law Society requires that I advise all clients about confidentiality.

If a potential conflict of interest exists, I will provide you with a conflict notice.

**Please know I am ready to help you.**

Ed Olkovich