

**Gerhardt Law Office, PLC -
Legal Happiness™**

*Client
Welcome
Book*

*Here are a few details
about us that you may
find informative and useful.*

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*If you lose this book or lend it to a
friend who does not return it, we
will be very happy to give you
another - just ask.*

This Welcome Book Has the Following Sections:

The Gerhardt Law Office, PLC Team Family

A picture of our Team Family and a few words about us.

How to Find Us

A description of where to come and what to look for when you do.

Our Courtesy System

A tool which helps us to be pleasant, kind and careful with our communication.

General Information

An outline of the things that we stand for and what we have to offer to you.

The Gerhardt Law Office, PLC Team Family

**Pictures of our Team
Family and a few words about us.**

The Gerhardt Law Office, PLC Team Family



Annette L. Gerhardt



Mark H. Savage



PauSette L. Brothers



Jennifer A. Barrett



Alexandria L. Cross

Who Are the Members of Our Team Family?

Annette L. Gerhardt

Annette was born in Madison, Wisconsin in 1951, the oldest of 6 children. Annette graduated from the University of Wisconsin – La Crosse in 1976 with a B.S. in Political Science. She went on to law school at the University of Wisconsin School of Law - Madison, from which she graduated with a J.D. in 1979. She joined Conway Law Office in Baraboo, Wisconsin, that same year, which later became Conway, Gerhardt and Seefeld, SC. When she left the firm in 1994, with fond farewells, she was a senior partner with the firm, and was teaching classes for the Wisconsin State Bar Association. In 1994, she and her husband pulled up stakes and moved to Whetstone, Arizona, where they live to this day.

Annette's only regret is that they didn't leave the Wisconsin climate sooner, although she and her husband Glenn both miss family and friends that remain in Wisconsin.

Over the many years of advising clients on estate planning, business structure and real estate law, she has learned how good planning can bring dramatic benefits to clients and their families.

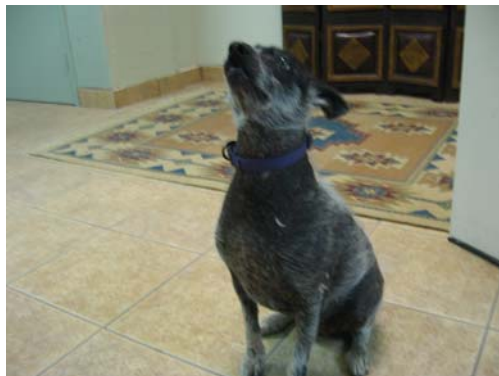
Annette is a member of the National Network of Estate Planning Attorneys, the National Academy of Elder Law Attorneys, the Arizona State Bar Association, the Sierra Vista Bar Association and other professional associations.

Annette enjoys classical music, reading, gardening, bird watching and riding her horses. Annette's husband of over 33 years, Glenn, is a licensed general contractor. Annette assists him with the administrative aspects of the construction business, and together they own a small mobile home park and three rental houses in Whetstone. They are each other's best friends, business partners and spouses. Glenn is often at the law

office, usually accompanied by one or more of his 4 Miniature Australian Shepherd dogs. Annette and Glenn have two children, and three grandchildren. Their daughter Erika lives in Wisconsin with her husband and two children. Their son Greg lives in Sierra Vista and works for a civilian contractor providing internet security services for the military.

Annette and her husband Glenn live outside of Huachuca City with 7 dogs, 7 horses and one cat.

Annette usually has this dog in the office with her:



Aardella is a semi-hairless Peruvian Inca Orchid Dog. Because she is semi-hairless, she is hypoallergenic (will not cause a reaction for someone allergic to dogs).

This gentle and loving companion is generally to be found curled up on a comfy bed in Annette's office, but will come out to greet visitors if asked to do so.

Mark H. Savage

Mark Savage is an Associate Attorney for Gerhardt Law Office, PLC. Mark moved to Sierra Vista in 1989 as an army brat and has lived throughout the United States.

Mark attended the University of Arizona for his undergraduate studies and obtained a B.S. in Business Management. He went on to law school at the University of Arizona, and graduated with a J.D., in May, 2007. He was admitted to the bar in December, 2007.

In the fall of 2008, Mark completed the curriculum of the National Network of Estate Planning Attorneys, and joined our Team Family in January of 2009. He is a member of the Arizona State Bar Association, the National Network of Estate Planning Attorneys, and the National Association of Consumer Bankruptcy Attorneys.

Mark's efforts are directed predominately towards client-centered estate planning with the goals of helping clients maintain financial control of their assets and eventually pass their legacy to who they want, when they want, in the way they want, so that their wisdom is passed along with their wealth.

Mark also provides bankruptcy counselling and representation to clients needing protection from creditors and is in the office 2 to 3 days a week.

In addition, Mark works full-time as a Senior Captain and Paramedic with the Fry Fire District, where he has worked the past 17 years. He is a certified Peace Officer and also serves as a Reserve Deputy and Tactical Medic with the Cochise County Sheriff's Office SWAT Team.

In his limited free time, he enjoys hiking, camping, skiing, and spending time with his dog.

Paulette L. Brothers

Paulette Brothers, R.P., is the Funding and Settlement Coordinator for Gerhardt Law Office, PLC. Paulette joined Gerhardt Law Office, PLC in January, 2007, with 19 years of legal experience, as well four years of executive secretarial experience.

During her prior years of work experience, she assisted attorneys as a paralegal in many areas of law; however, her primary focus has been probate and real estate as well as law office administration.

Since joining the Team Family at Gerhardt Law Office, PLC, her primary focus has been serving clients by coordinating the funding and settlement process in connection with Living Trusts. She also doubles as the bookkeeper for the office. She is meticulous and enjoys detail work.

Paulette grew up in Colorado. She came to us from Vermont where she lived for 19 years. She is now enjoying the Southeast Arizona climate. She enjoys entertaining friends and family, and likes to cook. Paulette plays a violin that was rebuilt by her great-grandfather.

Paulette also enjoys painting. The cover of this Welcome Book is a copy of a lovely painting by Paulette entitled “Lemonade” that she has been kind enough to allow us to use for this purpose.

Jennifer A. Barrett

Jennifer A. Barrett is one of the Client Services Coordinators for Gerhardt Law Office, PLC. Jennifer joined the Gerhardt Law Office, PLC team in 2009 with 10 years secretarial experience. She will often be the first person on our Team Family that you speak to.

During her prior work experience she has worked with the Nye County Natural Resources and Federal Facilities Office which is handling the Nuclear Waste Project on the Nevada Test Site. She also worked in the health care field and a family owned tire shop. Jennifer can replace tires and do oil changes on her own vehicles!

Jennifer was born in Spearfish, South Dakota and lived there until she was out of fifth grade and moved on to other adventures. She is a mother of two boys, and enjoys spending her time with them playing basketball and paintball, along with the other things boys like to do. Jennifer is also a Massage Therapist dealing in many different modalities, which is a side business started in 2003.

Since joining the Gerhardt Law Office Team she has helped clients and Team with their document preparation, calendaring, event coordination for our annual events, and many other valuable services to the Team and our Client Family.

Alexandria L. Cross

Alexandria Cross is one of the two Client Services Coordinators for Gerhardt Law Office, PLC.

Alexandria joined Gerhardt Law Office, PLC team in July 2010 with over 8 years of Human Resources experience.

During her prior work, she has worked as Human Resources Specialist in the U.S. Army Reserves and served as an Associate Manager for an Italian restaurant in her hometown of Winston-Salem, NC. In 2003, she relocated to Grafenwoehr, Germany with her husband who was active duty in the U.S. Army and served in the Reserve unit on the post for a period. Her duties included all administrative tasks to support soldiers as well as serving on active duty to assist in the training of soldiers mobilized in support of the wars in Iraq and Afghanistan. Her family relocated to Sierra Vista, AZ so her husband could serve out his remaining military obligation.

Alexandria is the mother one daughter. In her spare time, she enjoys spending time with her family as well as studying for her Associates Degree in Business Management. She also graduated in June, 2008 with a diploma in Paralegal Studies and is currently working towards her certification as an accredited Legal Secretary.

Since joining the Gerhardt Law Office Team she has helped clients and Team with their document preparation, calendaring, event coordination for our annual events, and many other valuable services to the Team and our Client Family.

ANOTHER PICTURE OF OUR TEAM FAMILY



How to Find Us

**A description of where to come
and what you will find.**

How to Find Us

If you haven't been to see us before

We are in Sierra Vista, Arizona, in Cochise Vista Plaza, the “little mall” across the street from the Sierra Vista Mall on State Highway 92, behind Lloyd’s Cleaners.

We occupy the last two suites at the North end of the mall. The door to our office is through the suite second from the end, between the two bright yellow ceramic planters.

How to find the office

The map that we have included on the next page should help you find us. Driving directions are given on the page after the map.



Coming from Tucson:

If you are coming from Tucson, take the 302 exit off of I-10. Turn right at the bottom of the ramp, onto STH 90. Take STH 90 to the intersection of 90 and Avenida Cochise. Turn left on Avenida Cochise. When you come to the stop light at the intersection of STH 90 and 92, go through the stop light, and then take an immediate right turn onto the frontage road in front of Cochise Eye and Laser.

Proceed past the Windemere Hotel, Apache Animal Hospital, and Cochise Floor Covering and Interiors. Turn left into the driveway immediately past Cochise Floor Covering and Interiors. You will be facing our office.

Coming from Sierra

Vista:

Take STH 92 toward Hereford. At the intersection of Avenida Cochise and STH92, turn left, then take an immediate right turn onto the frontage road, at Cochise Eye and Laser. Proceed past the Windemere Hotel, Apache Animal Hospital, and Cochise Floor Covering and Interiors. Turn left into the driveway immediately past Cochise Floor Covering and Interiors. You will be facing our office.

*Coming from the
Hereford area:*

Take STH 92 toward Sierra Vista. Turn right at the intersection of Calle Mercancia and STH 92, then immediately turn left onto the frontage road. Take the second right turn into the Cochise Vista Plaza parking lot. You will be facing our office.

Parking

Once you have turned into the drive in front of our office, there is a brick ramp leading to our front door. You could literally drive right into our office, but we would really prefer that you not do that. You may park anywhere in the parking lot in front of the office.

*Handicapped
Accessibility*

There is a handicapped parking space in front of the office, and the ramp from the parking lot leads to our front door, between the two bright yellow flower pots. We have a handicapped accessible restroom in the office, as well.

The Building:

There is a large arch over our doorway, under which is our sign, with black lettering on a gold background. There are bright yellow flower pots with flowers in them on either side of the door.

You may park anywhere in the parking lot in front of the building.

If you have any problems you can call us on 520-458-8051



Our Building

Viewed from the Frontage Road

Our Courtesy System

**A tool which helps us to be pleasant,
kind and careful with our
communication.**

Our Courtesy System

This is the system that we use in our contacts with each other and with you.

We have found that it is much easier to be happy in our work when we are pleasant, kind and careful with our communication.

We would like you to try to use the same system in your dealings with us so that we can all be happy together.

If you have any questions about the system just ask.

- 1. Speak very politely using a person's name - 'please' & 'thank-you' as a minimum.*
- 2. When you talk about a person who is not present, speak as if they are listening to your conversation. Use the person's name in each sentence in which you refer to them.*
- 3. If you have a problem with someone, talk about the problem only with them, and in private.*
- 4. Apologize & make restitution if someone is upset by your actions.*
- 5. Greet and farewell everyone by name, with eye contact and a touch.*
- 6. Blame a system not a person.*
- 7. Tell the truth!*
- 8. Use positive conversation.*

General Information

**An Outline of the
things that we stand for
and what we have to offer you.**

General Information

Legal Happiness

Legal Happiness starts with us. We all spend a lot of our lives at our law office. We find it far more pleasurable to spend the time in a place we enjoy, with people that we have become friendly with, and trust. Legal Happiness then extends to you and your loved ones, in part through our delivery of high quality legal services, and also through our striving to have the people with whom we come in contact be happy with us and with our services. People do not just buy goods and services willy nilly, they buy goods and services that they believe will make them happier in their lives.

We strive at all times to bring more happiness to the lives of the people that we come in contact with through the services we provide to them and the manner in which we treat them.

We know from experience that not everyone wants what we have to offer. Our program of estate planning is for people that truly care about the effect of their estate plan not only for themselves, but also for people that they love and care about.

We also know that the nature of our business foreshadows that some people will not be happy when they come to see us. Sometimes it is because they are ill. We can comfort and advise, help them to enjoy the time they spend with us, and help them to achieve peace that they have planned for themselves and those they love, passing on their love, care, wisdom and concern to their loved ones, and a legacy of themselves.

Other times people are not going to be happy when they come to us because they have lost someone near and dear to them. In those circumstances we can compassionately comfort, and help them cope with their loss, while at the same time helping them to manage the practical problems they face as a result of the death of a loved one, and in so doing, help them to acceptance of their loss, and back on the path to happiness in their lives.

Some people like the style of Estate Planning where there is little friendliness or discussion. The client says they want documents, the attorney prepares documents, has the client sign them, hands the client the documents and says something to the effect of “Have a nice life, call me if you have any problems.” This is not how we want to work with you.

We would like to become friends with you so that we both can enjoy our times together more. I know it sounds weird that we think people may enjoy coming to see us in a law office, but many people do.

We aim for your life and our lives to be happier because of your relationship with us.

What we want for you

Our aim is for you to enjoy coming to see us.

We know the only way we can be truly happy at work is if the people we meet are also happy. We all want to live long and happily, so we have decided to do things differently - to concentrate on helping you to be happy!

We want you to be excited about your estate plan, and have peace of mind that it will work the way you want and expect it to work for you and your loved ones.

If you are happy because of your experience with us, you will invite your friends to see us. We will continue to grow and prosper, and we can feel proud that we have helped you achieve what you want for yourselves, and the people that you love and care about.

Making the most of your time

Your time is very important to you, and that makes it important to us.

We usually run on time, and we will apologise if we keep you waiting.

How we make your experience pleasant.

We will provide a comfortable and relaxing environment in which to communicate with us. We will listen to you carefully and with attention to your concerns, worries and problems that you want resolved.

We will offer solutions from which you can choose to address those concerns, worries and problems. When you have chosen the solutions that you feel will best address your concerns, worries and problems, we will assist you to create the estate plan you have chosen. We will be open and transparent about the cost of our services for the solutions that we offer.

If we choose to work together, Estate Planning can be a pleasant and satisfying experience. If we can all enjoy the Estate Planning experience it will help us gain more happiness from the rest of our lives.

Docubank

Studies have shown that even people who have estate plans do not have their Health Care Directives with them 85% of the time when they need them. To address this issue, we have always provided the service of faxing or even hand carrying Health Care Directives to Health Care Providers on request.

However, it has always worried me that we are not here 24 hours a day, 7 days a week, 365 days a year. I have always worried that the time that one of our Client Family would most need their Health Care Directives would be on a holiday weekend at 2 a.m., when none of the Team Family was available to help.

Docubank fills that gap, and puts my worries to rest.

Your Health Care Directives can be placed on file with Docubank. Docubank will also store an Emergency Contact List for you, the name and contact information of your primary care physician, and whether you wish to be an organ donor. Up to four allergies and three conditions can also be listed.

A list of medications can also be placed on file with Docubank if you so desire.

Your Health Care Directives and all of that information are then available to your health care providers 24 hours a day, 7 days a week, 365 days a year, anywhere in the world that there is telephone or internet service.

Docubank is a service offered to all of our clients. Docubank enrollment is included at no additional charge for clients choosing certain estate planning services. For other estate planning services, Docubank enrollment may be paid for separately from the cost of our services. We will inform you of the availability of Docubank enrollment and the additional cost to you, if any, with the estate plan of your choice.

Preventive Maintenance

It is much better to prevent problems than to try to cure them, I think you will agree.

Things change in life. Your life will change, the lives of your loved ones, and the people that you choose as “helpers” to administer your plan in the event of your disability or death. If those changes are not incorporated into your estate plan, it will very quickly get out of date, and will not meet your needs and expectations or the needs and expectations of the people you love and care about.

We therefore offer programs of maintenance and upkeep for the estate plan you choose. We will explain the maintenance program for the particular estate plan you choose, and the cost of any maintenance plan that you elect to participate in.

Food and Drinks

We are happy to serve you coffee, hot chocolate, hot cider, tea, juice, soft drinks or water.

We don't use disposable cups or table ware. We serve your coffee in a coffee mug, tea in a tea cup, and other beverages in glassware. Snacks are served on china plates.

There are fine chocolates throughout the office. We also offer Chocolate Chewies, a delicious chocolate cookie that is both gluten and dairy free, and we usually have other snacks as well.

But, why do we serve food and drink in a law office? Well, there are a number of reasons really:

- We like to have nice food and drink for ourselves, and we enjoy sharing it with you.
- We enjoy eating on real china, drinking out of real glassware, and using real silverware, and we would like to share them with you.
- It's sometimes hard for you to judge how well we do our legal work. If we take extra care of you when you are in our office, you can guess that we are going to take a lot of care with your legal work as well.
- It helps us to communicate together if we share food or drink.
- Estate planning can be quite stressful for some people. Food and drink helps ease the stress of thinking about and discussing subjects that may be uncomfortable.
- The smell of the coffee and food keep our office smelling pleasant and inviting.
- It costs so little. Compared with the cost of the state of the art equipment and software applications we use, food and drink are a very inexpensive way to show you we care.

How do our fees compare?

We do not charge by the hour, and we do not charge by the document. We also will not try to sell you annuities, as will the “Traveling Trust Salesmen” that come through our community.

We charge for the value of the services we provide, our knowledge, our counselling and our ability to assist you to solve the problems and address the concerns that bring you to our office. The documents that are used to achieve your goals and solve your problems are merely a reflection of that process.

Our fees may be higher than those of other attorneys or legal document preparers in our community for mere document preparation. Document preparation is not estate planning.

Estate planning is a thoughtful process in which, through counselling and informed choices, you create a plan that addresses your problems, worries and concerns, to your satisfaction.

The value of an estate plan is not just in the cost of the documents. The value of an estate plan is measured by whether it meets your needs and expectations, and the needs and expectations of the people that will be left behind to administer it and live under it.

We will work with you to create an estate plan that will meet your needs and expectations, and the needs and expectations of the people you love and care about.

The cost of an estate plan is further measured by the cost of administering that plan. That is a cost that will be paid by your loved ones after you are gone.

Many attorneys will charge only a small fee for document preparation, with the expectation that they will then make it up with a probate proceeding in the future when you are gone.

We do not use estate plans as “loss leaders,” spending as little time with a client as possible and charging a small fee to prepare generic one-size-fits-all cookie-cutter documents, in anticipation of a fee later for a costly probate proceeding. The impact of people’s estate plans on themselves and their loved ones in the event of disability or death is too important to be treated in this manner.

We will work with you to offer you options, from which you can choose, to find the best solutions for the problems and concerns you share with us.

One size does not fit all!

We offer a variety of estate planning services with appropriate pricing for those services.

We will advise you in advance of the cost of the services you choose. The cost will be commensurate with the value of our counselling and the process you choose that provides the best solutions for your particular needs and circumstances, and those of your loved ones, almost always at a significant cost savings to your loved ones.

We guarantee you that whatever level of estate planning services you choose, the investment you make will result in a plan that is tailored to specifically address the problems, concerns and worries that you identify for us, so that you have peace of mind that you have appropriately planned for yourself and your loved ones.

Guarantee

If you are not delighted with our services, we will give you a refund of the amount you have paid, or will accept from you the amount you feel is commensurate with the value of the services you have received. Our only question of you will be “What could we have done to provide you with more value?”

Payments

You can pay by **Credit Card, Check or Cash.**

You will normally pay when you receive your bill, and we can tell you the amount in advance.

The Hours We Work.

There is someone in the office every weekday, from 9 a.m. until 5 p.m., barring an emergency or offsite engagement. Special arrangements may be made for appointments outside of these hours in special circumstances.

We do not answer the telephone on Monday mornings as we are in Team Meeting or Team Training. Calls will be taken by the voice mail system, and returned Monday afternoon.

If you call outside of normal office hours, or during office hours while we are away from the phone or on another line, then the call will be taken by the voice mail system. Every effort will be made to return calls the day that they are made, but if we are not able to return the call that day, the call will be returned not later than the next two business days.

We are closed on all Federal Holidays and the day after Thanksgiving.

A Bargain We Would Like to Make with You

Here is what we feel we owe to each other. It is what we would like our relationship with you to be built upon. If you have any concerns at all with this, we are happy to discuss with you what you feel would be fair.

We must tell you in advance the cost of any course of action we recommend and that you choose.

We must do our very best to find solutions for the problems you wish addressed.

We must listen to you when you talk.

We must apologise and make amends if we don't perform as we promise, and you can be the judge of our performance.

We will do our absolute level best to run on time because we know everyone hates to be kept waiting.

You must complain if there is something that upsets you. That way we have a chance to put it right, apologise and give you appropriate compensation.

You should pay your bills on time.

If we ask, (We don't ask everyone) we would like **you** to try to refer at least one person whom you feel would like the things we offer. In this way we can continue to have a flow of new people, and be here for you and your loved ones when you or they need us.

Kind Regards from:-

Annette L. Gerhardt

Mark H. Savage

Paulette L. Brothers

Jennifer A. Barrett

Alexandria Cross