

What is the difference between a Document Preparation Service and receiving legal advice from an Attorney?

Our Document Preparation Service (ProDocs LLC) will assist clients in preparing legal forms and providing generalized information about the law.

Our documents are time tested and reviewed by our attorney assuring compliance with state and local statutes.

What makes ProDocs LLC unique and essential to Financial Planning?

ProDocs LLC is part of the Wealth Management Accounting team (WMA). This Team is committed to improving clients' lives by providing individualized tax reduction planning strategies that align with the client's needs for Estate Planning, Asset Protection, and Investment Management. The operating documents of business entities created for our clients must have the necessary language to be useful as a tool, enabling our Team to provide options to meet the client's goals. With the proper operating agreements and experienced trusted advisors working together, WMA can deliver unparalleled results: Results that enhance our client's wealth.

ProDocs documents have proven to be effective in helping our clients ensure assets protection, assist in tax reduction planning strategies, and be the centerpiece of long-term estate planning. Our advisors need these tools to develop creative solutions and options that would otherwise be unavailable to our clients.

Document preparers do not practice law. We cannot represent you in court. We cannot suggest what a client should do in a particular matter or make predictions about how legal issues might proceed. We can provide generalized legal information to our clients, but we cannot provide legal advice.

Suppose you have a good sense of direction and know what you want after speaking with our team accountants, financial planners, and other advisors. In that case, we can accurately input that information into our pre-approved forms. However, there are tasks for which there is no substitute for an attorney to represent and give legal advice to your family about your specific situation. We highly recommend that you pose any specific questions to a licensed attorney. Preferably an attorney we recommend who is experienced and has a history of success in solving your particular problem.

Document preparation services may distribute non-specific legal information to the public. This distribution of general legal information is different from providing advice to a client on a particular legal matter or providing a legal opinion. Understanding this difference between "legal information" and "legal advice" is essential to comprehend ProDocs LLC's services.

Legal information is general information and not tailored to the unique facts of a customer's situation and is neutral and does not recommend a strategic course of action. We may provide clients with available options but cannot suggest which course of action to take. Legal information may inform an individual of appropriate forms and general information about what to include in a statement of facts. As legal document preparers, we cannot suggest specific facts and information to complete the legal forms.

Legal advice is specific to the unique needs and circumstances of each client. This advice offers an approach tailored to the client's factual situation and is much more than general advice appropriate for all persons who have the same issue. The giving of legal advice is the legal representation of you and your family and creates an attorney-client relationship.

Our document preparation service can prepare legal documents when given all the required information from the client requesting the documents. With detailed and complete client information, our document service can accurately input that information into the appropriate pre-approved forms and provide the necessary information to our team members. Team members may include CPA, Financial Advisors, bookkeepers, stockbrokers, or other trusted resources.

We cannot advise on specific legal questions about our clients' legal rights or remedies. If our client has complicated or unique situations, we will inform our client that an attorney's representation is required. We will help assist and refer our clients to an attorney who has experience working with ProDocs LLC and has shown expertise in areas of practice needed by our clients.