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# MEMORANDUM

To: Prospective Clients

Re: Paperwork for Your Planning Appointment and Attorney Qualifications and Experience

I would like to thank you for contacting our office for your legal planning needs. I realize your time is valuable, so in order to assist us in making your first appointment meaningful and productive, I would like to encourage you to complete the attached confidential Personal Information Form. This will provide me with valuable information to assist you in deciding the right estate plan for you and your family. Should you need assistance in completing this form or have any questions, we have a paralegal on staff to assist you (Phone: 904-264-8800).

In addition to the confidential Personal Information Form, I would encourage you to bring copies of the following documents to the appointment:

- **COPIES OF ANY EXISTING OR OUTDATED WILLS, TRUSTS, POWERS OF ATTORNEY, LIVING WILLS, AND HEALTH CARE SURROGATE DESIGNATIONS FOR YOU AND/OR YOUR SPOUSE.**
- **COPIES OF ALL DEEDS TO REAL ESTATE OWNED BY YOU WITH THE TAX PARCEL IDENTIFICATION NUMBERS.**
- **COPIES OF MOST RECENT ACCOUNT STATEMENTS FOR ALL RETIREMENT ASSETS (I.E. IRAS, 401K, PROFIT SHARING PLAN) AND BANK ACCOUNT, CDS, MUTUAL FUNDS, STOCK INVESTMENT ACCOUNTS, ETC.**
- **COPIES OF THE FIRST PAGE OF LIFE INSURANCE AND ANNUITY POLICIES.**
- **COPIES OF PREPLANNED FUNERAL, INTERMENT OR CREMATION PLANS.**
- **COPIES OF LONG TERM CARE POLICIES FOR YOU AND/OR YOUR SPOUSE.**

# QUALIFICATIONS, EXPERIENCE AND STAFF

Founder and Managing Attorney Grady H. Williams, Jr., J.D., LL.M., has been practicing law successfully since 1982, and is currently licensed to practice law in both Florida and Texas (inactive). Mr. Williams moved with his family to the First Coast as a young child. After attending Clay County schools, he received his undergraduate education at Florida State University School of Business as an Accounting major, followed by his legal education at the University of Georgia School of Law. After ten years in law practice, Mr. Williams completed the Graduate Tax Program at the University of Florida College of Law, received his LL.M. in Taxation, and opened his own firm in Orange Park in 1992. He is a two-time Past President of the Clay County Bar and currently serves as Treasurer of the Academy of Florida Elder Law Attorneys and on the Joint Public Policy Task Force for the Elderly and Disabled.

Associate Attorney Alison E. Hickman, J.D., was born in Christchurch, New Zealand, and moved to Clay County, Florida in 1985. She became a U.S. Citizen in 2007. After attending Middleburg High School, she completed her Associate of Arts Degree, magna cum laude at St. Johns River Community College in 2000, then her Bachelor of Science Degrees in Business Administration, Management, and Business Administration, Marketing, both magna cum laude, at University of North Florida in 2003. Mrs. Hickman graduated from Florida Coastal School of Law in 2010 and was on the Dean's List. Mrs. Hickman practices in the areas of Wills, Trusts and Estates, Probate, and Elder Law. She is active in the community and is a Past President of the Clay County Bar, is the Co-Chair of the Florida Bar Elder Law Website Committee and of the Jacksonville Bar Elder Law Section, is on the Board of Directors of Penney Retirement Community, and volunteers on the Scholarship Committee of the Clay Chamber and as a Judge for Clay County Teen Court.

The firm's administrative support staff is dedicated to providing prompt, courteous, understandable, and reliable personal service to our clients.

## AREAS OF PRACTICE

The firm emphasizes the following practice areas specifically related to planning for family and senior adult legal needs:

**Asset Protection**
**Elder Law & Medicaid Planning**
**Estate & Tax Planning**
**IRA & Retirement Planning**
**Life Care Planning**
**Probate & Trust Administration**
**Special Needs & VA Benefits Planning**
**Wills, Estates & Trusts**

We also practice in related areas of law, so check with us if you or your family has a legal need. We may be able to refer you to another local attorney if we do not practice in that area.