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MEMORANDUM

To: Prospective Clients

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

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

In addition to the confidential Personal Information Form, please 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- **COPIES OF ANY EXISTING OR OUTDATED WILLS, TRUSTS, POWERS OF ATTORNEY, LIVING WILLS, AND HEALTH CARE SURROGATE DESIGNATIONS FOR YOU AND/OR YOUR SPOUSE.**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 (active) 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 College of Business as an Accounting major (*magna cum laude*), followed by his legal education at the University of Georgia School of Law (*cum laude*), and served on The Georgia Law Review there. After ten years in law practice, Mr. Williams completed the rigorous Graduate Tax Program at the University of Florida College of Law (now Levin College of Law), where he also served as the Class Representative to the law school's student government, receiving his LL.M. in Taxation. He then opened his own firm in Orange Park in 1992, and has been actively and continuously practicing law in NE Florida ever since. He is a two-time Past President of the Clay County Bar, the 2021 President of the Academy of Florida Elder Law Attorneys (AFELA, the FL state chapter of NAELA), a Vice-Chair of the Elder Law Section Legislative Committee (2020 to present), and actively serves on both the statewide Joint Public Policy Task Force for the Elderly and Disabled, as well as the Board and Programs Committee for ElderSource, which is the First Coast's "AAA" (Area Agency on Aging & Disability Resource Center for NE Florida).

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

AREAS OF PRACTICE

Our 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
Legal Entity Formation and Planning
Probate & Trust Administration
Special Needs & VA Benefits Planning
Wills, Estates & Trusts

Mr. Williams also serves on a standing retainer basis for select First Coast government offices and businesses, dealing with many legal issues and concerns, so check with us if you, your family, business, professional practice, or organization has a legal need.