

Who is Katina Pantazis, P.A.?

Katina Pantazis, P.A. (“KPPA”) is a law firm specializing in Elder Law. KPPA was founded by Attorney Katina Pantazis. Attorney Pantazis works along-side another Attorney, a Receptionist and Legal Assistant to serve the clients of KPPA. More detailed information about our legal team can be found on our website.

What areas of law does Katina Pantazis, P.A. handle?

KPPA’s practice is focused on Elder Law. Our legal team can assist you and your family with a variety of legal matters including Estate Planning; Drafting and Preparation of a Last Will & Testament, Power of Attorney, Living Will, Health Care Surrogate, Trust, Lady Bird Deed, and many other Estate Planning Documents; Incapacity Planning; Long Term Care Planning; End of Life Care; Exploitation Prevention and Recovery; Residential Issues; Blended-Family Care Issues; Trust Set-Up and Administration; Probate Administration; Disability Planning; Insurance Issues; Government Services and Entitlements; Public Benefits; Medicaid; and many other areas.

Not only do we represent individuals in the actual preparation of an Estate Plan, we also provide representation and advice to those who have been appointed to serve as the Personal Representative or Executor of an estate, the Trustee of a Trust, or an Agent under a Power of Attorney.

Where is your office located?

Our office is located just south of Billy’s Café on US 441 in The Villages. Our address is 13710 N. US HWY 441, Suite 500, Lady Lake, Florida 32159. Although vehicle GPS does not always find our office, potential KPPA clients are given detailed directions in their appointment confirmation emails.

How can I schedule an appointment with one of your Attorneys?

To set an appointment with one of our qualified Attorneys, simply call the office at 352-600-2987 and speak with our Receptionist. Please be sure to specify whether you are a new client scheduling an initial consultation with the Attorney or if you are an existing client. Our staff will ask you about yourself and your legal matter. We will then provide you with information regarding your initial appointment.

Can I speak to the Attorney directly?

If you are not an existing client, our Attorneys are unable to speak with you until the time of your initial consultation due to our required compliance with various rules and regulations governing Attorneys in the State of Florida. However, you will meet directly with one of the Attorneys at your initial consultation.

If you are an existing client, you are free to call the office and request to speak with one of the Attorneys. Please note that in many circumstances, the Receptionist or Legal Assistant may be able to assist you without the need to consult with an Attorney. In instances where the Receptionist or Legal Assistant is unable to assist or your question involves legal advice, you will be forwarded to one of the Attorneys. If your Attorney is unavailable at the time of your call, you will be asked to leave a detailed message for the

Attorney. If our legal team believes your issue may require a more in-depth discussion, you will be asked to schedule a consultation with the Attorney at a mutually convenient time.

It is important to remember that, depending upon the Employment and Fee Agreement you entered with KPPA, you may be billed each time you speak with an Attorney or staff member. Pursuant to said Employment and Fee Agreement, Attorneys bill at a higher hourly rate than a Receptionist or Legal Assistant. By allowing our knowledgeable staff to address questions or concerns you may have that do not involve legal advice, you are controlling the fees billed in your case. Of course, if it is determined that you would be best served by one of our Attorneys, your issue will be forwarded accordingly.

When can I have an initial appointment or consultation?

All initial appointments at KPPA are scheduled by our Receptionist or Legal Assistant. When you contact our office for an initial appointment, you will be offered an appointment on our next available initial appointment date. You will be asked to complete an initial Client Intake Packet prior to your initial consultation. You will be asked to *bring* this Client Intake Packet, along with any existing legal and financial documents that are pertinent to your matter, with you to your appointment. This allows us to provide you with as much information during the initial appointment as possible. Please contact our office to discuss the next available appointment date.

If you arrive at your appointment without a Client Intake Packet, or you have not completed your Client Intake Packet, the Attorney will be unable to meet with you and your consultation will be rescheduled subject to a Cancellation Fee. Please review our Cancellation Policy for more details.

Does KPPA have a Cancellation Policy?

Yes, please note that we require twenty-four-hour notice for appointment cancellations. If we do not receive such notice, a Cancellation Fee of \$75.00 will be charged, excluding any emergencies.

Do you provide a free consultation?

At KPPA, we provide a free 30-minute consultation for prospective *new* clients in the areas of Estate Planning and Probate. There is a charge for consultations regarding all other matters, as well as for existing clients.

If we are unable to provide you with a consultation free of charge, and you are in need of this service, please contact The Florida Bar Referral Service at 1-800-342-8011 to locate an Attorney who may be able to provide a free consultation.

I am unable to come into your office for my initial appointment. Can you come to my home, health care or assisted living facility for the initial appointment?

At KPPA, we do provide house calls for those who are unable to come to our office, so long as those individuals live within a reasonable distance of our office. When you call

to schedule your initial appointment, notify our Legal Assistant that you will need a house call. Prior to scheduling the house call, you will be required to return the completed Client Intake Packet and submit payment in full. Please note, there will be an additional charge for the house call, calculated based upon where you live.

I will be bringing a family member or friend with me to my appointment. Can they attend the meeting with the Attorney?

The answer to this question is generally no. Private meetings and communications between an Attorney and a client are subject to the Attorney/Client Privilege. This privilege means that what is said between you and your Attorney is confidential and cannot be disclosed. If a third party attends that meeting with you, they may be forced to disclose the content of your communications with the Attorney under certain circumstances.

Moreover, there are several reasons why Attorneys may not be able to have a third party in your meeting with you. Those reasons are more fully explained at the ABA brochure [Understanding the Four C's of Elder Law Ethics](https://www.americanbar.org/content/dam/aba/administrative/law_aging/2018_ethics_brochure_final.pdf) (https://www.americanbar.org/content/dam/aba/administrative/law_aging/2018_ethics_brochure_final.pdf).

Depending on your specific circumstances and the matters you need to address, your friend or family member may be asked to wait in our comfortable waiting room, while you discuss your matters with the Attorney. This is done to protect your interests.

I live out of the area and cannot come to your office. Can I have a telephone appointment?

At KPPA, individuals who are out of the area may consult with our Attorneys via telephone. If you wish to conduct an appointment via telephone, please notify our Legal Assistant at the time of scheduling your appointment. Prior to scheduling a telephone consultation, you will be required to return the Client Intake Packet and submit payment in full. Further, you will be provided with specific instructions at the time you schedule your initial appointment.

Who do I contact if I want to refer an acquaintance, friend or family member to your office?

At KPPA, we consider it one of the highest honors when you refer your friends or family to us. Due to the rules that regulate how Attorneys operate as professionals, we are unable to contact a referral directly. Accordingly, your friend or family member must contact our office to schedule a consultation with one of our Attorneys. We also ask that you notify our office if you refer someone to us, so that we can thank you personally.

I am a professional who has a client or customer in need of your services. Who do I contact if I want to refer a client or customer to your office?

We consider it an honor when fellow Attorneys, accountants, physicians, financial planners, social workers, discharge planners, facility administrators, and other professionals refer their clients to us. We have worked jointly with both local and out-of-state Attorneys to provide quality representation to their clients in the area of Elder Law.

Additionally, at KPPA, we have developed a strong network of supporting professionals to assist our clients in the many different facets of Elder Law.

Due to the rules that regulate how Attorneys operate as professionals, we are unable to contact a referral directly. Accordingly, your client must contact our office to schedule a consultation with one of our Attorneys. We also ask that you notify our office if you refer someone to us, so that we can thank you personally.

How much will it cost if Katina Pantazis, P.A. assists me with my legal matter?

The cost of hiring competent legal representation concerning your legal matter may vary. Generally, fees charged are dependent upon the type of legal matter, the amount of time the firm must spend working on your matter, and the amount of assistance provided by the client. Some matters are billed on a Flat Fee Basis, while others are billed on an Hourly Basis.

Please be advised that at KPPA, our staff is generally unable to quote fees as they vary widely. When you meet with one of our Attorneys, you will be advised of the fees and costs associated with your legal matter, any retainer or initial payment required, your payment options, and ways you can reduce costs throughout our representation of you. Further, you will enter into a written Employment and Fee Agreement with KPPA prior to our office commencing work on your behalf which will set forth our agreement in detail.

How will I know what I am being charged in connection with my legal matter?

Once you retain KPPA, you will enter into a written Employment and Fee Agreement prior to our office commencing work on your behalf. This Agreement outlines the legal matter we are representing you on, the fees you will be charged, how often you will be billed, when your bills are due, what your retainer or initial payment will be, and the specific services KPPA will provide. You will receive a copy of this Agreement for your records.

At times, you may require assistance with a matter that does not fall within the scope of representation we have been retained to represent you on. Under such circumstances, you will be notified that the legal work is not covered under the existing Agreement and alternative arrangements can be discussed, such as setting up a separate matter or referring you to someone better able to assist you.

I believe my Estate Plan is simple. Can you just give me the forms and I can fill them out myself?

At KPPA, one of our qualified Attorneys will personally and professionally design and prepare an Estate Plan that is custom tailored for YOU. KPPA is not a document preparation mill and we do not sell “fill in the blank” forms. It is imperative that our clients understand the services we provide are comprehensive and do not consist of merely filling out forms. Rather, at KPPA, we provide personalized legal advice based on a comprehensive review of your specific situation, your family, your needs, and your goals. Additionally, we ensure our clients understand what each legal document does and does not do. Further, we supervise the execution of legal documents to ensure they are in

compliance with Florida Law. Moreover, we provide instructions on how to distribute your information and protect yourself from potential abuse stemming from appointing the wrong fiduciary.

The distribution of pre-printed forms without legal guidance often leads to catastrophic consequences. Correcting situations such as these is usually far more expensive than obtaining the advice and guidance of a qualified Elder Law Attorney in the first place. Don't set yourself up for failure.

Call Katina Pantazis, P.A. today (352-750-9566 or 352-600-2987) to schedule your consultation with one of our experienced Attorneys.