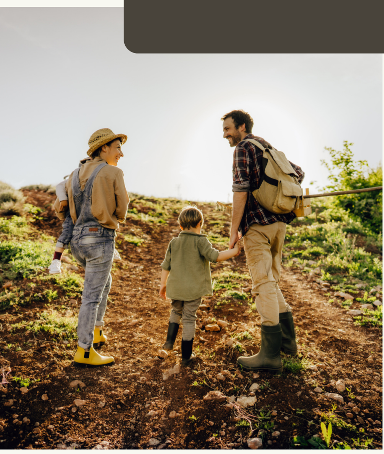
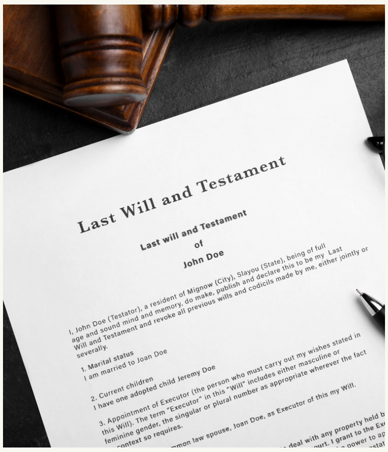
Allwright Bourke

LAWYERS & CONVEYANCING





CLIENT - WELCOME PACK

Allwright Bourke

LAWYERS & CONVEYANCING

Thank you for choosing us to help you. We feel privileged that you trust us with the most important matters and transactions in your life.

We became Lawyers & Conveyancers because we wanted to help people. We like helping people and have made it our business to solve problems and guide you through difficult legal issues and processes.

We created this info pack to explain how we do business and tell you a little bit more about Allwright Bourke and what we offer.

We started as a small business in regional NSW and over time we have organically grown. Today we service clients all over NSW.

Despite our growth, we have maintained our authentic and personal approach to law. We care about all our clients, their families and businesses. We aim to be here to help you with all the highs and lows that life throws at you.

Our business has only been able to grow due the relationships we build with our clients and our reputation of excellence.

We hope you to help you and look forward to getting to know you, your family, and your business.

S. Allwright & J. Bourke

Stephanie Allwright
Director

Jessica Bourke
Director

CONTACT US

admin@allwrightbourke.com.au

1300 22 5297
1300 AB LAWS

Our **Dubbo, Parkes, Forbes** and **Tumut** office hours are from 9:00am to 5:00pm, Monday to Friday.

Our **Sydney, Maitland, Newcastle,** and **Central Coast** offices are by appointment only.

Urgent questions or issues

The best way to contact us with urgent issues or questions is via telephone.

Non-urgent questions or issues

If your enquiry does not require a "same day" response or action, our preferred contact method is email.

You can book appointments online and do intake forms at home. Head to our website to book an appointment and start an intake form.

Communication and Meetings

We will communicate primarily by email.

We primarily do our appointments via video. Most of our practice areas can be run entirely electronically, meaning that you do not need to attend our office to sign documents or complete most of your transactions.

We also offer in person appointments at our main locations, if you would prefer to attend our offices and meet face to face.

COMMUNICATION EXPECTATIONS

- We have online client intake forms for most of our matters. If you are asked to complete a form, please put in the effort to do so, to the best of your ability. Completing the intake form gives us a “head start” on your matter and is very cost effective for you.

- Your matter is important to us and matters will be delegated and prioritised in accordance with deadlines and urgency.

- If you contact us or give us instructions to do something, we aim to action this within 1-2 business days, if not quicker. This is our aim, but from time to time, our staff are unavailable or have other commitments such as Court. Call us if you think we haven’t actioned something or if you are concerned. We are human and don’t mind if you call to follow up.

- Most of the time, your calls/emails will be answered by the paralegal, working on your file. Please let them help you and be forthcoming about why you are calling.

- Our Solicitors need uninterrupted periods to see clients and work on legal matters. They cannot take calls all day and may not be able to take your call immediately. If a paralegal cannot assist you, we will schedule a “call back time” for you to speak with your Solicitor or Conveyancer.

- Each Solicitor and Conveyancer has a designated time each day that they return calls or send emails responding to enquiries. Please be patient and allow our Solicitors time to respond to your calls and emails. We love talking to you, but we have to manage our time to be efficient and triage tasks, to give our clients the best outcomes.

- We respond within business hours. Please respect that our staff need time to be with their families and we do not work after hours or on weekends.

- It is our preference that you provide us with documents and information electronically (rather than dropping documents in paper). Please consider sharing links with us to documents, emailing us, or dropping in a USB with saved documents, it saves us time scanning and collating documents and will save you in fees.

OUR CORE SERVICES

- Changes of Tenancy or name on title
- Family Law & Intergenerational Transfers
- Mortgage or Guarantor Advices
- Residential Sales & Purchases
- Business & Commercial Sales & Purchases
- Rural & Water Sales & Purchases
- Leases

- Debt Recovery over $100k
- Commercial Transactions & Agreements
- Solar, Wind, Carbon Farming Projects
- Farming and Primary Production
- Commercial contracts and conveyancing

- Estate Dispute & Family Provision Claims
- Probate & Letters of Adminstration
- Simple & Complex Wills / Powers of Attorney Enduring Guardians
- Personal & Business Succession Planning & Asset Protection

OUR CORE SERVICES

- Binding Child Support Agreements
- Property/ Financial
- Binding Financial Agreements (prenups & postnups)
- Divorce
- Independent Children's Lawyers
- Parenting

- Criminal Offences
- Apprehended Violence Orders (AVOs)
- Legal Aid
- Traffic Matters

www.allwrightbourke.com.au

OUR CORE VALUES

Internally and externally, Allwright Bourke aims to conduct business in a way that is reflective of our core values.

Our team collaborated to determine our core values and we truly believe that these key values reflect who we are as a business.

They are not simply words — they are what we stand for!

Excellence
- High quality Services
- Consistency
- Value-adding

Integrity
- Honest & authentic behaviours & advice
- Trust
- Ethics / Morals

Teamwork
- Effective Communication
- Willingness
- Collaboration

Accountability
- Transparency
- Reliability
- Responsibility

Resourcefulness
- Innovative
- Utilising skills, technology & networks
- Pro-active attitude

HOW WE DO BUSINESS

STEPHANIE ALLWRIGHT
Director/Solicitor

JESSICA BOURKE
Director/Solicitor

TEAMWORK

We work collaboratively as a team. When you engage with us, you engage with the whole firm and have access to our combined resources and skill.

Over the course of your matter, you will likely speak or communicate with our reception team, our team of paralegals and at least one Solicitor or Conveyancer.

Behind the scenes, our Senior Solicitors and Directors are supervising and assisting the staff working on your matter. From time-to-time, we will step in and change the team members or add more team members to your matter. At times, you may have two Solicitors in appointments.

Why do we do this? To ensure excellence!

- **Quality Assurance** - Two minds are better than one. We strive for excellence. We work together to spot problems before they occur and to ensure all work meets our standards. You pay for our combined skills.
- **Matters change as they progress** - Sometimes, simple matters become more complex and require a more senior staff member to assist. We adapt and change our staff to meet the needs of your matter. Alternatively, it is more cost-effective for you to appoint staff on lower hourly rates to do simple transactions.
- **The show must go on** - If a staff member is sick, on leave, or perhaps just can't get to your matter in a reasonable timeframe, by working collaboratively, we are able to delegate your matter to another team member, who can keep your matter moving.

COSTS

We provide excellence at a reasonable price. We are not the cheapest. If you want the cheapest Solicitor or Conveyancer, then maybe we are not the right firm for you.

We issue you with a Cost Agreement that sets out our estimate fees and the scope of work. We are transparent about legal costs.

When you want quality work, you never want to have the cheapest doctor, accountant, or Solicitor. You get what you pay for!

We believe that our work will add value to your life. We can spot problems or help resolve disputes in a client-focused way. We believe in our quality and skill, and we stand by our pricing. We are not cheap. We are good quality for money.

We use time recording software that accurately records every minute we work on your matter, so you are charged accurately for the actual work done (unless it's a fixed fee matter).

We invoice regularly and send "interim" invoices, rather than large bills at the end of matters. This allows transparency and accountability with our fees. Our invoices are interactive and you can request additional information or contact our accountants department if you have queries about your invoice or fees.

We request money in trust upfront and throughout matters. The exception to this is estate & conveyancing matters, where we do not generally request funds until the end of the matter.

We do not work unless we hold credit funds in Trust and will cease work if we do not have credit funds in Trust.

Whilst we are a growing business, we are still a small business. Your fees pay our staff's wages, which in turn, pay their children's school fees and mortgages. When you pay our fees, you are supporting a small business and many local families and communities.

WHAT ARE SOME REASONS THAT COST MIGHT "BLOW OUT"?

- **SOMETIMES MATTERS ARE COMPLEX**

  Our commitment is to perform work cost-effectively for our clients, charging only for actual services rendered. Acknowledging the dynamic nature of legal matters, the firm may discover complexities or unexpected issues during the process, and rest assured we will transparently communicate any complexity to the client.

- **EXCESSIVE OR UNNECESSARY COMMUNICATION OR CONTENT**

  While frequent phone calls are welcomed and we absolutely enjoy speaking with our clients, it's important to note that all work done on a file incurs charges. To avoid being billed for a 30-minute phone call, clients are encouraged to opt for concise email communication for their inquiries.

- **NOT PROVIDING US WITH INFORMATION**

  Timely cooperation is crucial to streamline the legal process. If asked to provide information or complete tasks, prompt action is appreciated, as delays contribute to additional work on the file. Withholding information can complicate matters, and full disclosure is encouraged for accurate and effective legal advice. The firm assures confidentiality and emphasises the importance of open communication.

- **THE OTHER SIDE MIGHT BE DIFFICULT**

  This might cause a lot more back and forth correspondence, delay or force litigation to commence. Whilst we endeavor to settle matters early on, we can not force the other party to behave appropriately or force them to do things.

HOW CAN YOU PREPARE FOR YOUR APPOINTMENT?

MAKE NOTES OF THINGS YOU WANT TO DISCUSS AND BRING IMPORTANT DOCUMENTS WITH YOU

PROVIDE US WITH ID

- At your appointments, you will be asked to provide ID. This is to confirm your identity, and to confirm your residential address (which we must hold on file for accounts purposes). If you do not have original documents, you will need to apply for them.

- Your information is stored securely. We are a law firm and confidentially is our business; so please be assured that your information is stored securely.

- For any matter that includes a purchase, sale or transfer of real estate assets, we will need to obtain full ID including:

(i) Drivers License or Photo Card;
(ii) Birth Certificate (or passport);
(iii) Marriage Certificate (formal version); and
(iv) Medicare Card

YOU SHOULD SEEK FINANCIAL OR ACCOUNTING ADVICE FOR ALL TRANSACTIONS OR AGREEMENTS BEFORE ENTERING INTO THEM

We will never provide you with financial or accounting advice.

If you elect not to get financial or accounting advice – that is your decision, but we will not be liable if you suffer adverse financial implications, as a result of failure to get financial advice on any transaction, contract or proposed agreement.

Who should get financial or accounting advice?

- Anyone buying or selling a property or a business (it might be financially beneficial to buy land in a trust or entity or there might be GST or CGT tax issues that need to be considered in the contract)
- Anyone giving a guarantee or signing a mortgage or loan document
- Anyone conducting a business transaction including leases, purchase agreements or setting up a business.
- Anyone who is planning on doing a Will or succession plan.
- Anyone who is going through a family law property settlement – get financial advice when making offers of settlement and before signing any agreements.
- If you are an Executor, you should get tax advice on the proposed Inventory of Assets and distribution options and finalise any personal tax returns or estate tax returns.

Allwright Bourke
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admin@allwrightbourke.com.au
1300 AB LAWS (1300 22 5297)

LOCATIONS

PARKES OFFICE
19 Court Street
Parkes NSW 2870

FORBES OFFICE
9 Harold Street
Forbes NSW 2871

DUBBO OFFICE
21 Church Street
Dubbo NSW 2830

TUMUT OFFICE
62B Wynyard Street
Tumut NSW 2720

BY APPOINTMENT

SYDNEY OFFICE
119 Willoughby Rd
Crows Nest NSW 2065

MAITLAND OFFICE
Level 1, Suite 14, Bulwer Street
Maitland NSW 2320

CENTRAL COAST OFFICE
3 Amy Close
North Wyong NSW 2259

NEWCASTLE OFFICE
Level 1 • 142 Union Street
The Junction NSW 2291

www.allwrightbourke.com.au