

# Revermann Law

## Accountability Chart

Updated: 01/23



### STRATEGIST (CLAUDIA)

- Superthinking and Vision (CR)
- Business and personal development (CR)
- Strategy and Goals (CR)
- Research & Development (CR)
- Mentorship (CR)

### STRATEGIST SUPPORT

- Systems/Procedures (R)
- KPI Management (CR)
- Monthly Stats & Air Table (S)
- Calendar Management (Admin)

### FINANCE (CLAUDIA)

- Budgeting (CR)
- Bank account Management (CR)
- Bank transfers (CR)
- Tax returns (CR)
- Review billing (CR)
- Accountant communication (CR)
- Process Billing (Admin)
- Mail client invoices (Admin)
- Bank Reconciliations (S)
- Bank deposits (Admin)
- Pay vendor invoices (Admin)
- Credit card itemization (S)

### HR (CLAUDIA)

- Compliance (Employment & Law) (Admin)
- New employee onboarding/manual (CR)
- Staff education / training (CR)
- Team Celebration (Admin)
- Annual Reviews (CR)
- Payroll (CR)
- Hiring/Firing (CR)
- Employee Manual (CR)
- Quarterly 1:1 (CR)
- Professional Development (CR)

### OPERATIONS (CLAUDIA)

- Document Management
  - Scan (ADMIN)
  - Fax (ADMIN)
  - Mail Distribution (ADMIN)
  - Update Templates (R)
  - Formatting (ADMIN)
  - Saving Documents (ADMIN)
- Client Communications
  - Email communications w/client & update notes (billing & other non-billable) (CR+B+R+ADMIN+E)
  - Phones (ADMIN)
  - Reschedule appts for Claudia, Barb (CR+B+ADMIN+E)
  - Greet Clients (Admin)
- Miscellaneous
  - Communicate with IT (Admin)
  - Ordering equipment (Admin)
  - Obituaries (Admin)
  - Supplies/Inventory Ordering (ADMIN)
  - Dues/Subscriptions (ADMIN)
  - Calendar Management (ADMIN)
  - Errands (ADMIN)
  - Close Office (B+R+ADMIN)
  - Set Up/Clean up Conference Room (ADMIN)
  - Dishes (ADMIN)
  - Manage clocks/batteries (ADMIN)
  - Morning huddle (CR+B+R+ADMIN+E)
  - Weekly case review (CR+B+R+E)

### CLIENT SERVICES (CLAUDIA)

### MARKETING (CLAUDIA)

- Website design and updates (CR)
- Referral tracking (CR)
- Lead conversion (CR)
- Community Engagement (E)
- Referral relationship building (E)
- Referral recognition/gifts (E)
- Advertising (CR)
- Seminars (CR)
- Mailings (Admin)

### EP (CLAUDIA)

### PROBATE (CLAUDIA)

### TRUST ESTATE ADMIN (CLAUDIA)

### REAL ESTATE (CLAUDIA)

### BUSINESS TRANSACTIONS (CLAUDIA)

### BUSINESS STARTUP (CLAUDIA)

### GUARDIANSHIP (CLAUDIA)

(NEW) (EXISTING)

- Intake (B+R+ADMIN)
- Engagement
  - Meet with client (CR+E)
  - Prepare client engagement letter (ADMIN)
  - Complete task sheet (CR+E)
  - Email financial planner (CR+E)
  - Task work (R+ADMIN)
- Document Prep
  - Draft docs (R+ADMIN)
  - Task to reviewer (R+ADMIN)
- Review & Activity
  - Review docs (CR+E)
  - Mail/email docs to client (R+ADMIN)
  - Follow up with client (R+ADMIN)
- Closing
  - Finalize docs for signing (R+ADMIN)
  - Meet with client for signing (CR+E)
  - Record documents (R+ADMIN)
  - Send closing letter (R+ADMIN)
  - Share documents with client (R+ADMIN)
  - Close matter in Clio (R+ADMIN)

- Intake (B)
- Engagement
  - Meet with client (CR)
  - Prepare client engagement letter (B+ADMIN)
  - Complete task sheet (CR)
  - Task work (B)
- Document Prep
  - Draft docs (B)
  - Task to reviewer (B)
- Review & Activity
  - Review docs (CR)
  - Mail/email docs to client (B)
  - Send nominations (if applicable) (B)
  - Open file with court (B)
  - Serve notice of hearing (B)
  - E-file docs with court (B)
  - Send client letter and get FEIN (B)
  - Send request for financial info (B)
  - Draft inventory and final account (B)
  - Get approval from client and heirs for inventory and final account (B)
  - E-file closing docs with court (B)
- Closing
  - Get statement to close from client (B)
  - E-file statement to close with court (B)
  - Send closing letter (ADMIN)
  - Close matter in Clio (ADMIN)

- Intake (CR)
- Engagement
  - Meet with client (if applicable) (CR)
  - Task work (CR)
- Document Prep
  - Draft docs (B)
  - Task to reviewer (B)
- Review & Activity
  - Review docs (CR)
  - Mail/email docs to client (B)
  - Communicate with beneficiaries (CR+B)
  - Draft trust accounting (CR+E)
  - Get consents from beneficiaries (B)
  - Communicate with accountants (CR)
  - Communicate with trustees (CR+B)
  - Deliver Quarterly Deposit on Hinkemeyer to KDV (MAIL) (ADMIN)
- Closing
  - Close matter in Clio (B)

- Intake (CR)
- Engagement
  - Meet with client (if applicable) (CR)
  - Task work (CR)
- Document Prep
  - Draft docs (CR+R+CH)
  - Task to reviewer (CR+R)
- Review & Activity
  - Review docs (CR+CH)
  - Communicate with client (CR)
  - Communicate with OC (CR)
  - Review title work (CR+CH)
  - Draft docs for closing (CR+R+CH)
  - Review closing docs (CR+CH)
- Closing
  - Close matter in Clio (R+ADMIN)

- Intake (CR)
- Engagement
  - Meet with client (if applicable) (CR)
  - Task work (CR)
- Document Prep
  - Draft docs (CR+R+CH)
  - Task to reviewer (CR+R)
- Review & Activity
  - Review docs (CR+CH)
  - Communicate with client (CR+CH)
  - Communicate with OC (CR+CH)
  - Draft docs for closing (CR+R+CH)
  - Review closing docs (CR+CH)
- Closing
  - Close matter in Clio (R+ADMIN)

- Intake (CR)
- Engagement
  - Meet with client (if applicable) (CR)
  - Task work (CR+B+R)
- Document Prep
  - Draft docs (R)
  - Task to reviewer (R)
- Review & Activity
  - Review docs (CR)
  - Mail/email docs to client (R)
- Closing
  - Close matter in Clio (R)

- Intake (B)
- Engagement
  - Meet with client (CR)
  - Prepare client engagement letter (B)
  - Task work (CR)
- Document Prep
  - Draft docs (B)
  - Task to reviewer (B)
- Review & Activity
  - Review docs (CR)
  - Mail/email docs to client (B)
  - Send nominations (if applicable) (B)
  - Open file with court (B)
  - Serve notice of hearing (B)
  - E-file docs with court (B)
  - Attend hearing (CR)
  - Send client letter (B)
  - Send request for financial info (if conservatorship) (B)
  - Draft inventory (CR)
  - Serve inventory (B)
- Closing
  - Close matter in Clio (B)

- Intake (B)
- Engagement
  - Prepare client engagement letter (ADMIN)
  - Task work (CR)
- Document Prep
  - Draft docs (B)
  - Task to reviewer (B)
- Review & Activity
  - Review docs (CR)
  - Mail/email docs to client (B)
  - E-file docs with court (B)
  - Serve notice of hearing (if applicable) (B)
  - Attend hearing (if applicable) (CR)
  - Send order to client (if applicable) (B)
  - Order certified copies (if applicable) (B)
  - Communicate with title company (if applicable) (B)
- Closing
  - Close matter in Clio (B)