Indiana Estate and Elder Law

Accountability Chart

Updated: 5/23/2024

velocity work.

LEADERSHIP TEAM

STRATEGIST
JENNY

- Strategy (Justin)
- Culture (Jenny)
- Mentorship (Jenny)

MARKETING
ANNA

27 Initial contacts per week

- Managing PPs (Anna)
- Event Coordination (Anna)
- Retail Strategy and Communication (Anna)
- Content Creation (Anna)
- PR (Anna)
- Website Management (Anna)
- Social Media Management (Anna)
- SEO (Anna)
- Charitable org. collaboration (Anna)
- Tracking ROI (Anna)
- Reporting ROI (Cara)
- Brand Management (Anna)

CLIENT SERVICES
TRISA

75% Conversion Rate

- **Employee Reviews**
- Intake (Hannah)
  - Answering Phones (Hannah)
  - Prospect Enrollment (Hannah)
  - Online Contact Forms (Sarah)
- Calendar Management (Trisa)
- Template and Form Inventory (Hannah)
- Physical File Processing (Alexxis)
- Digital File Processing (Lisa W.)
- Follow up (Sarah)
- Client Acknowledgment (Hannah)
- Collect Payments (Hannah)
- Mail Processing (Hannah)
- ITT Management (Hannah)
- Deposits (Hannah)
- Binder Process (Jake)

LEGAL/TECHNICAL
RACHAEL

80% Closing Rate

Monthly average fee $3,500

- **Employee Reviews**

OPS
TRISA

- **Employee Reviews**
- Supply Ordering/Inventory (Sarah)
- Stocking (Hannah)
- Vendor Liaison (Trisa)
  - Cleaners (Trisa)
  - Phone (Trisa)
  - Printer (Trisa)
  - IT (Trisa)
  - Compliance (Trisa)
  - Security (ADT) (Trisa)
- Internal Acknowledgments (Trisa)
- Firm KPI Entry (Trisa)
- Firm KPI Management (Trisa)
- Project Management (Trisa)

FINANCE
JUSTIN

- Accounts Receivable (Theresa)
- Accounts Payable (Theresa)
- Payroll (Buying Time)
- IRA Contributions (Buying Time)
- Accounting Data Entry (Theresa)
- CPA Relationship Management (Justin)
- Airtable Entry (Justin)
- Account Reconciliation (John)

HR
JUSTIN

- **Department Head Reviews**
- Hiring (Trisa)
- Firing (Justin)
- Benefit Management (Justin)
- PTO Tracking (Trisa)
- Handbook Compliance (Justin)

EP
RACHAEL

- Initial Meeting (AA)
- Handoff to Client Services (AA)
- Design Meeting (AA)
- Drafting Documents (Valerie)
- Editing Drafts (AA)
- Signing Meeting (AA)
- Funding (if applicable) (Heather)

ADMIN
RACHAEL

PROBATE
SAM

- Initial Meeting (Sam)
- File Processing (Chelsea)
- Closing File (Chelsea)

TRUST ADMINISTRATION
SAM

- Initial Meeting (Sam)
- File Processing (Chelsea)
- Closing File (Chelsea)

ELDER LAW
RACHAEL

MEDICAID
LISA B.

- Initial Meeting (Lisa)
- File Processing (Lisa)
- Closing File (Lisa)

GUARDIANSHIP
SAM

- Initial Meeting (Attorney AA)
- File Processing (Chelsea)
- Hearing (AA)
- Closing File (Chelsea)

MAINTENANCE
SAM

- Maintenance Spreadsheet Management (Sam)
- Maintenance Billing (Theresa)
- Event Coordination (Sam)
- Maintenance Client Communication (Sam)
  - Mailings (Sarah)
  - Follow up (Sam)
  - Enrollment follow ups (Sam)
  - Program Utilization (Sam)