

Davis Miles, PLLC

LegalShield Department - Document Submission Policy

General Provisions.

1. We can process and review a certain number of pages of documents under your LegalShield plan benefits, depending on your legal plan. In your consultation, the attorney should have discussed with you the number of pages your plan permits. If you have any questions about how many pages you can submit under your plan, please contact LegalShield or use your mobile app to obtain a copy of your legal plan contract.
2. If you submit pages in excess of your plan's limit, they will not be processed prior to you paying a document handling fee. For up to 100 pages, the handling fee will be \$75. For more than 100 pages, the handling fee will be \$125. This is the fee to PROCESS the documents; review of the documents by the attorney is discussed in item 3 below.
3. If you want the attorney to review more pages than what is covered by your plan benefits, you will need to pay additional fees, usually in the range of between \$200 and \$800. This is separate from the processing fee explained in item 2 above. If you do want the attorney to review the additional pages, please call us to discuss other options with your attorney. Before the attorney can begin reviewing additional pages, you will need to sign a fee agreement and pay the agreed amount.
4. You must consult with the attorney before sending documents, except for traffic tickets and Will Questionnaires.
5. Please only send us COPIES of your documents because we digitize and shred all documents sent to us. Include your file number with all documents. **DO NOT SEND US ORIGINALS.**
6. Do not send us your notarized Last Will and Testament. When we send you your Will documents, you need to get them properly notarized and witnessed and then keep them in a safe place. Do not send them back to us. You may call and discuss with one of our attorneys the appropriate places where you can store your estate planning documents.

How to Send Documents. Documents may be sent to us by the following methods:

1. Upload from the LegalShield mobile app that you can download and install to your smartphone from Apple's App Store or Google Play. This is the preferred method.
2. You may email documents to docs@davismiles.com. Always include your file number in the subject line. This is for both Arizona and New Mexico LegalShield members.
 - a. We encourage you to send emailed attachments in PDF format. We can accept other formats, but PDF is best. TIF formats are more likely to be a problem. We will try to process all formats, but sometimes it is not possible. If we cannot process your documents, one of our staff members will contact you to try to resolve the issue.
 - b. If you send documents by email, the best format is to send the documents as attachments to the email, instead of embedded in the text or body of the email.
 - c. It is best to send one email with multiple attachments, instead of many emails with one attachment each. Because we receive so many document submissions, if you send multiple emails, it may delay the processing of your documents because your submissions may be scattered among dozens of other email submissions.
3. Fax. **Arizona LegalShield** members may fax documents to (480) 344-5771, and **New Mexico** members may fax documents to (505) 242-1014. Faxed transmissions are received 24 hours per day via a paperless electronic fax system. Include your file number with the documents.
4. Mailing. If you mail documents to us, send us copies only. **DO NOT MAIL IN ORIGINAL DOCUMENTS.** We accept copies only. What you send us will be scanned and shredded. Please mail your copies to our Document Processing Center: Davis Miles, PLLC, Attn: LegalShield Dept., 1423 S. Higley Rd., Building 4, Suite 110, Mesa, AZ 85206. Include your file number with the documents.

5. Photos. If you have photos, it's best to send copies by email. Please only send in the photos that the attorney instructs you to send. Also, if you have multiple photos of the same thing, please only send the best three to five photos instead of all of the photos you have. Attach those three to five photos as attachments in one email.
6. Outside the Guidelines. We are unable to process the following even if you wish to pay a handling fee since these examples fall outside of the guidelines above:
 - a. More pages than your LegalShield Plan permits;
 - b. An entire box or an entire folder or packet of documents (since that exceeds the number of pages your contract plan provides);
 - c. A CD or thumb drive, since that is not "pages" of a document. Instead, you need to either email the files as attachments or print out the pages you will submit and then send the number of pages allowed by your plan; and
 - d. Disturbing photos, including photos of injuries or physical trauma, surgical photos, sexually explicit or suggestive photos, or other photos containing images of an upsetting nature. If you have any questions about whether your photos contain such imagery, please call us to discuss before sending them.

Davis Miles, PLLC is proud to be the LegalShield provider firm for Arizona and New Mexico. Our commitment to each LegalShield member's experience prompted us to provide this guide to (or summary of) how we send and receive documents in connection with your legal matters. We continuously strive to provide more efficient and complete service to you. As a LegalShield member, you have access to one of our friendly staff members or attorneys to clarify any portion of our document policy by telephone at (602) 285-4664 in Arizona or (505) 246-0231 in New Mexico.

As always, if you have any questions or concerns about any of the above, please feel free to call us to discuss.