



## Mark Loftus

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### THE APPRAISAL DEFENDER PROCESS EXPLAINED:

1. You'll receive our *Consultation Agreement*, which we need to have in place before you start sending me anything.
2. We'll send instructions for uploading the complaint, at-issue appraisal report(s), and workfile(s); once everything's uploaded.
3. I will examine it all (60-90 minutes) and contact you either with
  - a. A list of items (*To-Do List*) to provide me; or
  - b. To schedule an online meeting\* to discuss my initial findings. In the course of this meeting, I'll give you a *To-Do List* with documentation I think you should obtain to supplement your response (this is what the *Supplemental Workfile* is for).
4. After you've completed the To-Do List to the best you can, we'll have an online meeting to discuss what you've produced.
  - a. I may ask you to develop what you've given me a little more; or
  - b. We may have everything we need for the next step.
5. I'll draft and send you an outline of what I think your response should say, you'll make what changes you want (it's your response) and return it to me for proofing. This back-and-forth may occur several times.
6. Once we've got the response letter where you want it, you'll sign it (along with the *Questionnaire*), and it'll go into the Response Package.
7. Finally, I will have you examine the *Response Package* before I upload it to TALCB.
  - a. We can discuss in it an online meeting if necessary; otherwise,
  - b. You email authorization and I upload the package digitally to TALCB.

You don't have to make two copies.  
You don't have to burn a CD.  
You don't have to send it overnight.  
APC will bundle it and ship it.

I will also give you an idea of how I think your case will be resolved. The options are:

- a. Dismissal;
- b. Warning (a dismissal with a letter in your file saying you need to be more careful about X, Y, and Z);
- c. Contingent Dismissal (a dismissal which requires that you do some work/classes/mentoring over brief period of time, such as 3-6 months prior to having your case dismissed); and
- d. An Agreed Final Order (a disciplinary action from the board. This is sent to the National Registry where it can become known to your clients)

\*We use Zoom for our online meetings. The audio and video are excellent, *and* we record them! That way, you have a copy of all we discussed (making note-taking less necessary).

All of this usually takes 5-8 hours. My fee is \$200/hr. and your initial retainer is \$1,200 for six hours. If we use less than that, you get it back, if we need more, I'll let you know in advance.

Sincerely,

Mark Loftus