

Welcome to right here in Mass. We're a weekly podcast that features individuals throughout the Baystate who are on our radar and should be on yours from the Berkshires to Boston, Cape Cod in the Islands. Tune in to learn about who you should know right here in mass.

Hello. Re here in mass. Listen. Today's guest is Sam Allen, founder of the Duxbury based Estate and Business Planning law firm Law mom. Through her work with her clients, Sam's goal is to be their trusted advisor who helps them make the very best personal, financial, and legal decisions for their family throughout their time.

Sam, I'm super excited to have you here today, especially because you're one of my favorite clients to work with at my marketing agency, dash of social. And so I'd love for you to share what law mom is and what led you to start. , thank you so much. And you're my favorite too. They're recommend you to everyone.

So hire Ashley in national Social, um, . Thank you for having me. So I started Lama back when I had my son, we, who is now actually just turned three. Um, I had a very traumatic birth and I was practicing law, um, part-time at the time of my birth. And I didn't feel fulfilled in my job. Um, I wanted to really make a difference and.

the traumatic birth happened and I almost passed away. We had nurses here for nine months at our house. Mm-hmm. And I couldn't really mm-hmm. Do anything. I was drafting my estate plan in my hospital bed at home. Yes. I didn't have an estate plan. Everyone's like, you didn't, you're a lawyer. I didn't, I was young.

I said, say all the same things my clients say to me, , um, now we have a plan. But anyways, um, so I thought, you know, I could really make a difference and share my story and the importance of having a plan for your family if something. To you so that your loved ones don't have to deal with the aftermath of probate in all the things that come with someone passing away or even becoming incapacitated.

So we opened LA Mom. Um, we have grown immensely. The community has been so great. Mm-hmm. and we really, truly serve our community through lots of education. Education is so important because your plan, Ashley might be different from my plan. It should be different because we have different family dynamics and mm-hmm.

it's really important, um, to me to. Like five star customer service for clients and really made make Lama my own, which I have done. And now we have, um, a support staff and another attorney and it's really been a great journey. Um, and Lama we really focus again on education and making sure our clients understand estate and business planning and how to protect themselves in both areas of life.

Because if you're a business owner, it's very important to have your business set up properly and that includes the estate planning and. As an individual, as a family, um, you wanna make sure that you're protected personally as well. Absolutely. And so Sam and I had started working together just five months after she started law mom.

Um, or actually it might have been a year and a half after law mom. I can't remember. It was like pretty close within Yes. Starting it. Um, But one of the things that Sam mentioned is that she grew so quickly and so what would you say kind of led to that success with going from, starting with literally just you to a whole team of, um, people who can support your clients, and also the full-time attorney that you now have?

So I took a really in-depth look at what I learned when I worked for firms, when I was in law school, all of those types of things. And even just my other jobs I had, um, in marketing. And I'm so happy I hired you. Um, it was really hard for me because I used to do social media and I went through embedded so many people and Ashley was my person, and I'm so grateful because I attribute a lot of the growth to your company because you really understand my brand.

Um, I also spoke with my family and asked if it was okay for me to really share some family, like, I guess you could say, secrets or very personal information, like almost passing away, like, this is how it affected our family. So I'm really, really open. Um, I try to relate to clients as much as I can and people in general, um, because I feel like people learn better through stories.

Absolutely. So I share a lot. I'm very, I feel like. . I'm very personable in the sense of I want people to know who I am. I wanna make sure we're the right fit for our clients. I think the education piece is really important, so you can hop on, watch a webinar for free, learn about state planning in 30 minutes, and then meet with us and really, really understand what your plan is doing.

For what your business needs to do to protect yourself, essentially. Um, so I think that's a huge thing. We just started recently doing some events. Um, I can tell you when I tell someone I'm an estate planning attorney or a business attorney, they roll their eyes and don't wanna talk to me. So we try to make up sign in terms of like line and wills or like.

Line of business formation and try to really change the concept. And something that we're doing soon is we are moving our office to downtown Duxbury by Brothers Market. And then our space has a huge event space. So I wanted to ch turn the firm into a community space as well. So, There's a specific space next to our firm that we'll use for our events.

So you could come in and do like a social media piece and we can invite people in very different. So it's more inclusive in the community and a place people can come. And it's not just like, oh, that's a law firm. Like I can't go there. We're very open. So I would say that's a huge thing. And then just an amazing community and this.

Staff that we have. Um, you know, we love everyone that works there. They're, you just become part of the family if you are a client or if you work here. So, absolutely. I think that's in a big, um, Part of our growth. Mm-hmm. . And then our new attorney, Amanda, she offers so much as well. And she's up on the North Shore so she can help clients up there.

And it's just been so wonderful. And again, like your social media is awesome, so . Well thank you. And you said exactly what I was going to say is that I definitely believe that like you. Sharing your story and what you're going through personally has absolutely helped to really build that connection with specifically the moms that you're looking to connect with.

Um, especially with sharing your story of Wes, Sam, son Wes, who's three years old, has type one diabetes. And that's one of the things that Sam does a lot is educate parents on that journey, but also what that means for having special needs planning with your estate plan. And so I think it's really powerful that when people read your content, They might themselves not feel confident enough to share their stories publicly, but if they read that you're going through the same thing, it's like they're instantly trusting you right off the bat because they know that they'll be able to work with someone who gets it and who understands.

Yeah, and to speak to that, you and I have spoke, talked about, you know, sharing. , um, our story as a family with Wesley's diagnosis, excuse me. And I'm getting, like, I always get teary-eyed, even like a year later. It's like very emotional. Mm-hmm. . So, um, I spoke to my husband and my family again, and we talked about sharing it, and we thought if we can make a difference in anyone else's life through the work that I do, it's worth sharing the story.

Right? And of course, it's like 12 and it's like, mom, stop talking about that. Then I won't. But in different respect, his wishes. But right now I ask him, he's like, ok, he may not understand what he said. Um, so in any event, you know, we shared, started sharing those posts and we had some cool, um, stuff on our website in terms of like learning about special needs or supplemental needs planning, which I found a lot of clients have used.

And since we started talking about it and you had said like, let's do like a piece on this. Um, our supplemental needs, special needs planning, and the firm itself has grown immensely. We did a webinar, our webinar and a in-person event, and now we're. Helping a lot of families that may have a child with special needs, and it's not just like,

It's all special needs, like medical, special needs, anything. Right? Right. It's inclusive. So it's just really about making sure that your children, when they receive an inheritance from you, can still qualify for whatever they need to. Absolutely. Regardless. Absolutely. Of like what is going on, right.

Because every family, again, is so different, but I'm so grateful that you kind of nudged me to share that because it definitely, I've seen an influx of clients coming. Right. Absolutely. In speaking of

family, Sam comes from a family of entrepreneurs, so how has that shaped your business and your entrepreneurial journey and your success with it?

Yeah, so I always tease my mom. She had me working when she was working, um, at like the very young age. I had to do the cash register that had actual like money and no credit cards. , that's how old I'm, um, well there might have my credit cards, but counting back the change and learning all of that. So, um, I definitely think that having like an entrepreneurial mom, like.

A business woman orientated, um, family in general has really helped drive me and motivate me. Um, when I worked for my mom, I had to do all of the positions from like sweeping and then work my way up. And so I think that really helped shape me. And I see my husband now with his company. He's a builder doing that with Wes, even though he's three.

Wes comes and sweeps and then he'll move his way up. So pretty. Yeah. And with you and Nick both being entrepreneurs and being parents to two really young boys, how do you kind of juggle it all? So this question is really meant for the parents who might be listening, who, especially now, cuz we're recording this in July when it's summer and kids are outta school and they're wondering how they can just balance being a parent and running their business without feeling guilty.

What's been your process for being able to do both? So, Um, so it always brings me back to when I hired you, like didn't wanna give up the social, but I was like, I have to do this to help my business grow. Um, so what we did was my husband and I sat down and we looked at our finances and we knew that if we hired someone for in-home care, our finances would.

Take a hit, but did that hit allow us to grow even more? Mm-hmm. So we said yes, we took the risk, we had a nanny come in. Um, and especially with Wesley's diagnosis, super helpful. Um, and then with the new baby, she, um, helps with Jax as well. And it just made a huge difference. And having our nanny here has helped.

Grow our businesses. Mm. And then also like I have a great family. Like my mom comes and stays once a week cuz if you don't know anything about type one, sometimes we're up all night for weeks on end with high sugars and those types of things. Unless can't. Take care of it himself, of course. So where they're acting as his pancreas.

And then we have aunties here. My dad comes like, it's really great, like having that village is so important. And then, um, I tell my friends and sometimes clients, I'm like, you know, if you need a break, send your kids over. I'll send my kids over. So, you know, it sounds funny, but like it doesn't work. And just like having that support system in any way that's possible is super helpful too, because there's no way I would be able to grow the company like I am without the support.

And it's hard. Scary, but. Definitely taking risks, like with our new office space, signing the check over. I was like, is this what I wanna do? But I remember can't scroll unless I do it, so Yes. Oh, you're

absolutely right. And it's like the same, um, thought process can be applied to hiring team members like you've done.

It's like, yeah, as business owners, we have a ceiling on the number of hours that we can dedicate. To our work each day. Literally, we only have 24 hours in a day and we do need time for sleeping and relaxing. And so when you, when you're able to bring people on, whether in, whether it's in a professional setting like team members or a personal setting like yourself, having a nanny, it allows you to do that much more and focus on the things that will end up.

bringing bigger results with it. No, I think totally. And I, I know you and I have had so many conversations about this and you know, just bouncing ideas off of colleagues and people who I've experienced before. Like I found attorneys that I wanted to be like, and I reached out to them and kind of like mimic their processes.

They live across the country, but it's been so beneficial because I'm like, why am I reinventing the wheel if I can call and pick someone else's brain? Like I always try to. or like have a conversation about like what's working for you. Like we have the nanny, but maybe for someone else it's a daycare maybe.

Mm-hmm. , you know, that doesn't work and there has to be a different pivot, right? So there's always like that time of pivoting, which as a parent, it's a pivot every minute. I always say that, right? It changes by the minute. So , you have to absolutely willing to. , definitely. And you mentioned something that I actually wanted to ask you further about, which was picking the brains of other attorneys that you've seen who have really good processes that you wanna utilize.

And one of the things that Sam does is that she's in this, like, I guess it's probably like a coaching program, new law business model. Yeah. Um, so she's in a coaching program with tons of attorneys within it that, uh, they can all really support each other and have that community. So how has being in a program like that supported your.

I mean, it's instrumental in our success. You just have like mentors in there and there's coaches and you can bounce ideas off of other attorneys because like any profession, right, it's always scary. Like if you're cold calling someone, you never know what the response on the other end of the phone is going to be.

So this group, it allows us access to attorney attorneys across the country. So if I have someone call in, I like know someone that's in California, for example, and can refer out there, um, we get to hear a lot about, you know, ways of practicing law differently or. Experiences, and we're part of this group, right?

Because questions come up all the time. And when I was alone without Amanda here, um, I mean, I could talk to myself, but I wanted to have other people to be like, Hey, does this make sense? I'm

not sure about this. This is something I haven't experienced before. And now Amanda and I bounce a lot off of each other, but we still go back to the group and ask.

And I mean, I have friends. We're doing a big seminar in Colorado in October, which is really cool because you just grow your network even further. . I think knowing people from all different areas and like places and different walks of life just makes me a better attorney because it's allows me to be more relatable and understand like different decisions that people make, right?

And be able to advise clients even better. . Yeah, absolutely. And um, going along with that, because you mentioned Amanda, who is, who is a recent addition to the team full-time in that sense, um, how, like, what's been your process for being able to find the right employees and team members? Like what types of things would you look for if someone's listening to this episode and they're kind of at that point where they really need to bring in some help, what would you recommend to them for the hiring?

So we use a recruiting agency, um, empower and hiring. Um, they're super helpful. They help the onboarding process. Um, they recruit fine. Like I'm the worst interviewer because I just like talk about everything. Exactly. for questions. And Amanda's always like, Sam, like, what do you have? I dunno, like it's just not my saying, like she's much better at that.

I'm like, so what'd you do this weekend? Do you like why? Like, I don't help. Um, but she's very good at it. So the recruiting company kind of like helps in, you know, again, it's going back to that, oh, I don't wanna spend money on this. . But like it allows the growth again, because I don't really, right now, my focus for me, not that I don't have time, cuz you make time for what?

It's important, right? I just know where my strength is and it is not interviewing. So we try to like , utilize another firm and then it also allows 'em to like bring in people, they help you and then the onboarding they'll guide and make sure it's going well. So I think that's a useful source with Amanda.

Um, Spoke to someone that knew her and knew me, and it was lawyer stories. Um, the, I cannot remember his name. He's such a sweet guy. He's outta Massachusetts. Runs this story about attorneys, um, on a platform Instagram. This interesting story. So I had spoken to him and then Amanda had spoken to him and he was like, you have to meet Sam.

And then he is like, you have to meet Amanda. And then it just really worked out and we're like such a great fit because she like keeps me on track and just like stop talking work. And she's very smart. And what's really cool is that. We work so well together. So if I have things I need to do with Wes, I know that Amanda's always there and vice versa.

She has something. So when you come in here, you know both of us, like it's not just like you're working with one of us, it's like a full team offer. Like today we had a signing I was scanning in cuz

we don't have anyone in here and she was on the backend like putting the files in. So as much as we're doing the law lawyer work, we're also front facing with clients because we want our clients to know who we are, what we are, and how the firm.

Like works together, right? Because we work as a team. Um, so I think the team mentality is really helpful. Absolutely, and I can attest to that because for our listeners, I hired law mom to do our business contracts. And so that's one of the things that I really loved was the fact that Amanda, Sam, and I were on a Zoom call together, and Sam and Amanda were asking each other questions back and forth to get their perspective.

And so you're able to kind of tie that. Together, and you're not just getting the experience of one person, but two people, which is really valuable. Two people for the price of one ultimately. Thank you. Yeah. That's a question that comes up. Well, do I have to pay double? No.

we want you to have the very best experience so we have reviews like you, because at the end of the day, like for me, the most important is the client experience, right? . Absolutely. And one thing that you mentioned that I wanna dive into further was the fact that you're really involved in the community.

So you've been hosting a bunch of workshops all over the place. You're vendors at different events that are happening. You're gonna have your own event space. Um, with that, how would you say that you've been able to choose the events that are the right ones to be at, if that makes sense? So like, with so many events to choose from and so many events where you could.

be a vendor, be an exhibitor. How do you know which one will actually be worth your time ultimately?

So I have a little like, Cheater experience because I used to run marketing for Ibel, which many of you know if you're in Massachusetts is theme park on the South Shore. So I had gone to many of the events. Well now there's a lot more events, but prior, before Covid, a lot of events. Now I knew like. What was going to be there.

But in terms of from a business standpoint, we have avatars, right? So we pick who our clients are. For us, we service so many clients because of referrals, right? We have elder law clients. We have. Younger clients. We have single married, all different. So what I look for is focused on is events that families will be at.

So minor kids, because that's where I really relate the minor children, cuz that's where I am in my life, right? Mm-hmm. . So we stick to that avatar and then it kind of explodes from there. But when I do events, I pick events that are. , um, based on like families and we go there and we choose events that way.

And then it's mainly, um, on schedules, like what weekends I have available. Cause my husband does help with the kids, but sometimes I can't dish 'em every weekend.

Yeah. And that's awesome. And. Some people like are hesitant to be so involved and host all of these free workshops because they worry about the time and getting nothing in return. But it's like you're planting seeds in people's minds, and if you just continue to stay in front of them and add them to your email list, once you host that event, then you have the opportunity to push them much further down that funnel.

Totally. And it's really interesting because I had something really cool happen. So, um, people from a year, like clients from, or potential clients from years ago that were leads have recently signed on. And then I had a client recently who did some planning and needed to update planning and didn't do the full package.

And she had saw, like she saw something on Facebook for this wine event I was doing. She showed up, um, and this is from a year ago and she's like, I saw you. It was the message. She came to the event, now she's doing her full estate plan and also the financial advisory work with, she hired her too. So Amazing.

You're right. I love that, like planting this in and it will grow. It might take a little while, but the more seed you plant, The better it is and the more you can be out there at the top of mind from just, even from being a business attorney, we talk to our clients about marketing and that's a huge thing.

So Yeah, absolutely. And you're so right because especially with estate planning, it's an investment, but it's of course a well worthwhile investment and so it might take a little bit longer for someone to be able to. So even though like you said, you might not see results coming right away, or people signing on right away know that it will come in the end, which is exactly what has happened for you, right?

Yeah. So I'm so excited. And then too, like the organic social that you guys do. It's just top of mind constantly. Mm, absolutely. And so now since we've talked a little bit about the estate planning portion, I'd love to focus on the business planning law. Um, so if someone who's listening to this episode would be interested in, um, Starting a business in Massachusetts, what would you say from a legal standpoint is important for them to know?

Keeping in mind for our listeners that this is not legal advice and Sam is not your attorney.

It's not attorney advice and yeah, no, um, this is purely educational . So it's funny because if anyone is in like the groups, like the, there's Boston Businesswoman, I think we can say that without trademarking, um mm-hmm. Uh, or any issues in terms of using that name. But any of the groups you'll see, um, Lisa Sigman, she's the best.

I love her. She's also a business attorney and she's always giving awesome advice and. . It's so true. People will say like, oh, just file with the state. It's fine. It's not fine. And Lisa, like, will attest to this. Mm-hmm. , you can actually search her and she'll, like, there's a million episodes of her saying this, you can file with the state.

That's great if you set up an L L C. But should you be an L L C? Should you be a corporation one? Do you have an S corporation? There's a million questions that come into play with regard to setups. There's a, there's statutes that are specific to the setup that you have that. A business owner has to meet to actually totally push themselves, put the shield up.

It's called a corporate, um, shield between personal liability and business liability. So there's operating agreements. There's so many things by sell agreements, all of the things that come with the business that you need to do to make sure you're protected. Um, and we always tell clients, You know, make sure everything you're doing is run through your business, not personally, because if you're not doing it correctly and hitting the statute requirements, which you can look it up, um, you know, you could ultimately, if you were to get ever get sued, be putting your personal assets in LA in.

Limbo and those personal assets could become part of a judgment. And everybody always says, well, it's probably not gonna happen. Right? But is it really worth the risk? Like not setting it up right and it, and not setting it up right, is just filing with the state and not having that operating agreement if you're an L L C and not fulfilling all of your obligations and meeting all the requirements of a statute.

And then if you wanna sell your company, there's agreements that have to be put together like that, buy, sell, right? So, hmm. Spewing things out out of order here, but we have a full process. We call it Lyft to legal. We go through the formation requirements, e i n numbers, right? That's a huge thing. And if you don't have one that's not okay.

Mass tax connects, like there's many things that go with the businesses. . And then insurance. We talk about insurance and financial and tax. So you need all of your professionals in place to really set up your business properly. And is it a big undertaking? Yes, but it's worth it in my opinion, because if something ever did happen and I see it all the time, um, and you don't do it right.

You could be in big trouble. Right, right. So, and also like filling, going to the estate planning, if you're setting up a trust and you're moving your business into the trust to flow to your family, but your operating agreement, for example, doesn't say that you can do that, you're violating. Like operating room or if you don't have one, like that's a huge deal.

So, you know, there's so many things that come into play and again, we do a ton of education that will be much more organized than me just spewing things off the top of my head, . But definitely,

um, attend one of our educational events or, um, I love Lisa check her like webinars out that she does cuz she's awesome and gives great advice.

And, you know, that's something I love about the community that we're all in and you know, like being supportive of each other. I find that as. So crucial and so important and growth as well. Like going back to when we talked about growing. Yes. Um, you know, I see like promoting other attorneys, I'm like, this is what it's about.

Oh my gosh. Yeah. Which is something that I see you do all the time and, and other attorneys too, where it's like, if they. if it something isn't necessarily their zone of genius. They have the just the perfect person to refer to whoever they're speaking with, and it's really nice to see that and see the whole community collaborating together and being able to provide a great source for someone who's in need.

A hundred. I 100% agree. You know, I think that's like, I love seeing that. That's my favorite when I go on the groups and I'm like, yes. Yes, . Yep. Exactly. And speaking of referrals, what are your favorite local businesses to support? So it could be on the South Shore where you are. It could be anywhere across Massachusetts.

So, oh, I have so many. You're a business, of course. I love . Um, personally I love, um, the studio in Duxbury. Um, I don't know, like depending on where everyone's located, frost and found, um, Bonnie. Is the owner of Frost and Found, and she, um, does a ton of like flower arrangements. Feather and Finn, they're super popular.

I love them. Um, who else? One of my good friends runs Sugar Plum Nannies, which in these days no one can get their kids into daycare. So she is like, an awesome resource for moms. Um, what else do we love? There's so many. Restaurants, Elba. I don't know. I try to support local as much as I can. Yeah. Um, Val, you know Val like the hive?

Yep. Um, if anyone, I forgot you. I could still love you. So , I forgot American. Oh. And my husband, American. He's actually building out our office, so I should probably like promote him. Um, and my Kiki, who's our nanny, I love her. . We love her. What else? Oh, you know where we went? So we love, um, moms looking, or dads are guardians looking for things to do with their kids off.

All kids. I am like obsessed with, oh, I've heard good things about that. . Yeah. And then there's this children's museum in Accon, which is far from us, but we go up there, it's like the coolest place, not super busy, like really good for like younger kids, not overstimulating. Um, we took west of his first movie over the weekend for his birthday with my cousin, um, with a three-year-old.

That was interesting. We'll just leave it at that in a diabetic. We gave him a lot of candy. So it was two days of work. , oh my goodness. Sugars. Um, I'm trying to think of who else I d. I love any small

business. Right? Cause it's like the support. So sorry. I'm good. You're like, can you stop now? Oh my gosh. No.

I love all this shoutout. And it's good that you have so many that you can just ramble off like that. . Yes. And also, um, the organizers. I love all the organizer companies. Oh yeah. To think, oh, Pam's assorted spaces organizer. She's awesome. And the collective, though, I love them too. And. Kids sell shore.

Christina. She's awesome. Oh, they share good stuff to do. Yeah. Activity and whatnot. Like I literally, they're like, yeah, my go-to. I'm like, what are we doing this weekend? , , . Love it. Well, Sam, this has been such an awesome episode and I really enjoyed recording it and know our listeners will enjoy listening to it.

And now I'd love if you could share where listeners can find you online in case we'd like to learn more about you in the process of getting an estate plan or setting up their. Um, so, or like finding things to do on the weekend. So I'm just , is that you, Michael? Every weekend. How do I make my children tired?

No. Um, so you can find us@www.lawmom.com or you can call us at seven eight one two seven. 7, 4, 4, 8, 8. You can also stop by our office, which is at my house. Feel free. We're under construction, hence the builder. So it's a hot mess here, but you're more than welcome to say hi, . Awesome. And I will link to all of those in the show notes so that way people can click through from there.

But Sam, thank you so much again for coming on. Thanks.

Thank you for tuning in to this episode of Right Here in Mass. We hope you enjoyed listening to it as much as we enjoyed recording it. Be sure to subscribe, leave a review, follow us on social media and share our podcast with your network. See you next week.