

NAVIGATING THE EARLY YEARS:

LESSONS, TIPS, AND STRATEGIES FOR A
SUCCESSFUL VA PRACTICE

Erin Svetlik

Marc Whitehead & Associates

ABOUT ME



MARC WHITEHEAD & ASSOCIATES
ATTORNEYS AT LAW, LLP

Erin Svetlik

Jr. Managing Attorney

Marc Whitehead & Associates

403 Heights Blvd., Houston, Texas 77007

Email: erin@marcwhitehead.com

Tel: 346-509-8239 (direct)

Tel: 713-228-8888 (main line)

Areas of Practice:

- Social Security Disability
 - Veteran's Disability
 - Disability Insurance
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WHAT WE WILL COVER

- Intake Criteria
 - Client Expectations
 - Appeal Strategy
 - Business Proactive Lessons Learned
 - What Version of Me Do I Need To Be?
 - Imposter Syndrome
 - Q&A
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INTAKE CRITERIA

- Learning the right questions to ask at intake
- Green light, yellow light, red light cases
 - Green – intake can make the decision to take the case
 - Yellow – managing attorney needs to review the case
 - Red – intake can make the decision to not take the case
- **Request a copy of the decision letter at intake!**

CLIENT EXPECTATIONS

- Once the client is onboarded, set realistic expectations for the client.
 - Let the client know from the outset that their case will not move quickly.
 - Average claim duration:
 - New Claim: 146.4 days (~5 months)
 - Supplemental Claim: 144.8 days (~5 months)
 - Higher Level Review: 125 days (~4 months)
 - BVA: 730-927 days (2 years – 2.5 years)
 - Set tasks to follow up with the VA every 30 or 90 days.
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APPEAL STRATEGY

- Which route should I take my case?
- Understanding the different appeal options:
 - Higher-Level Review
 - Supplemental Claim
 - Board of Veterans' Appeals

BUSINESS PRACTICE LESSONS LEARNED

- Business Practice
 - Don't reinvent the wheel
 - Use an argument bank and templates
 - Hire clerks/interns
 - Teaching staff *why* we do things—not just *how!*
- Practice of Law vs. Business of Law
 - Balancing legal strategy with firm profitability



DEALING WITH VETERAN WITH MENTAL HEALTH CONDITIONS: WHAT VERSION OF ME DO I NEED TO BE?

- Finding the right personality for handling PTSD/mental cases
 - Giving PTSD clients grace
 - Assessing approach: Litigation mode vs. eggshells mode vs. friend/comforter
 - Handling combat vets who are always on edge
 - Practicing adaptability



IMPOSTER SYNDROME

- Imposter syndrome: psychological phenomenon characterized by persistent feelings of self-doubt, inadequacy, and fraudulence, despite objective evidence of one's achievements
- Common thoughts:
 - “I didn’t serve in the military.”
 - “I wasn’t stationed overseas.”
 - Accepting that some experiences will always be beyond personal understanding



QUESTIONS?



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