

ENGAGEMENT LETTER

(On Attorney Letterhead)

Date

Dear Mr./Ms. :

This letter will confirm our conference on *(date)* and the fact that our office is now representing you in the following matter(s): *(full description of legal services to be provided, including, if applicable, the level of services--e.g. administrative review, trial, appeal, etc.)*

We are glad to have you as a client in regard to this particular situation(s). If you wish for us to represent you in any matter other than that stated above, we will be happy to review that matter with you and determine if we can be of service to you.

Our fees are outlined in our fee agreement, which we have already discussed and a copy of which is enclosed. *(Note: If agreement has not yet been signed, send two signed copies of fee agreement and request that the client sign one and return it to you.)*

We will keep you informed as this matter progresses. In the meantime, if you have any questions, please call. Thank you for choosing our firm to represent you in this matter.

Sincerely yours,

Enclosure

NON-ENGAGEMENT LETTER

(On Attorney Letterhead)

Date

Dear Mr./Ms:

In response to your request when you contacted this firm, I have reviewed the information you provided regarding possible representation in the matter of: . I appreciate the confidence you have expressed in our firm; however, the firm has decided not to represent you in this matter. Therefore, I am returning with this letter the documents you provided for my review. In declining to represent you in this matter, please understand that we are not expressing any opinion concerning the merits of your case.

If you still wish to pursue this legal matter or make a claim against any other party, you should be aware that the passage of time may bar you from doing so. Since time is always important in legal matters and could be critically short in your case, if you decide to contact another law firm about this matter, I recommend that you do so *immediately*.

We are not charging any fee for reviewing your case, since we have declined to represent you and are not expressing an opinion as to the merits of your case. If you need legal assistance for other matters in the future, I hope you will again consider our firm. Should you have any questions, please contact me.

Very truly yours,

DISENGAGEMENT LETTER

(On Attorney Letterhead)

Date

Dear Mr./Ms. :

When I undertook to represent you concerning (*describe nature of representation, including case number, if any*) you signed a Fee Agreement agreeing to pay for the legal services provided to you and the costs and disbursements made on your behalf. At the present time, our records reflect that you have not paid our invoices in a timely manner as you agreed you would.

Our records reflect that you have paid \$ (*report amount*) , leaving a balance of \$ (*report amount*) , which is now due and owing. Due to the apparent breakdown in our professional relationship, enclosed please find a Motion to Withdraw as Counsel, which I intend to file. I will be happy to continue to represent you if we can make acceptable financial arrangements in the very near future. Otherwise, my further representation of you has terminated.

If you wish to be represented in this matter, you should contact another attorney immediately. Keep in mind that, if your case is not filed in a timely manner, you may be barred forever from pursuing your claim. (*Include specific time limit, if known.*) You may wish to call the Lawyer Referral Service at (*provide number*).

Please contact our office to make arrangements for return of your file. I will be happy to give it directly to you or to forward it to your new attorney, if you wish. It is our policy to maintain a file such as yours for years, after which time it will be destroyed. I look forward to hearing from you soon regarding these arrangements.

Very truly yours,

SUBSEQUENT APPOINTMENT CONFIRMATION

(On Attorney Letterhead)

Date

Dear Mr./Ms. :

This will confirm your appointment to meet with me in our office on at o'clock. The purpose of our meeting will be . Please bring (*specify documents, pictures, etc.*) with you when you come.

I look forward to meeting with you again. If you have any questions before our meeting, please feel free to call.

Very truly yours,

MONTHLY STATUS LETTER

(On Attorney Letterhead)

Date

Dear Mr./Ms. :

In order to keep you informed on a regular basis regarding your case, I will be sending you status reports such as this one on a monthly basis. Please do not hesitate to contact me at any time for more detailed information concerning the progress of your case.

Since our last meeting on , the following has happened:(*specify court appearances, discovery, motions filed, etc.*)

I have enclosed copies of correspondence, filings, other documents our firm has prepared on your behalf since our last status report, and a monthly bill for our services, which I trust you will find in order.

Thank you for allowing our firm to represent you in this matter. We will continue to apply our best efforts on your behalf and report to you as your case continues.

Very truly yours,

COURT APPEARANCE OR HEARING LETTER

(On Attorney Letterhead)

Date

Re: *Case Name & Number*

Dear Mr./Ms. :

Your case has been set for jury trial on at o'clock in the county courthouse, located at in . Your case is before Judge in Courtroom .

You will find it most convenient to park (*specify parking lots, etc.*) .

Judge 's courtroom is located on the floor. I will meet you(*location*) at o'clock the day of the trial.

You must plan to be present for this. If you have any questions, please feel free to call.

Very truly yours,

DEPOSITION SCHEDULING LETTER

Date

Dear Mr./Ms. :

Your discovery deposition has been scheduled for at o'clock here in our offices. I will meet with you in our office at o'clock, one hour prior to the deposition, to answer any questions you may have concerning this matter. Please review the enclosed Deposition Instructions before we meet.

I look forward to seeing you on for your deposition. Until then, if you have any questions, please feel free to call.

Very truly yours,

FILE CLOSING LETTER

Date:

Re: *Case Name & Number*

Dear Mr./Ms. :

Thank you for allowing our firm to represent you in this matter. Your case is now concluded and we are closing our file. We will retain our file for a period of _____ years.

We are returning all original documents and papers you gave us in connection with this case. You should keep all your information concerning this matter in a safe place in case you need it in the future. If you would like to have anything else from our file, please let us know as soon as possible.

We hope this matter was concluded to your satisfaction. We would appreciate it if you would take a few minutes to complete and return the enclosed client survey. If we may be of assistance in the future to you or to friends or family members who may need legal help, we hope you will contact us.

Very truly yours,

POST-REPRESENTATION SURVEY

How did you find out about our firm?

- Referred by family/friend
- Knew attorney personally
- Advertisement in
- Other

Was our office conveniently located for you? Yes No

Did our staff greet you courteously when you came to the office? Yes No

Were your phone calls answered pleasantly by staff? Yes No

Were your phone calls returned promptly by attorneys? Yes No

Did the attorney handling your case explain what the firm would do? Yes No

Did you feel the legal fees charged were fair for the services provided? Yes No

Did you receive regular bills on your case? Yes No

Were you given regular status reports on your case? Yes No

Did the attorney handling your case explain the progress of your case? Yes No

Did you feel you met with your attorney when you needed to? Yes No

Did you feel your attorney cared about you and your case? Yes No

Overall, were you satisfied with the legal services you received? Yes No

If you need legal representation in the future, would you call our firm? Yes No

If a friend needed an attorney, would you refer him/her to our firm? Yes No

Please write down any comments or suggestions you may have to help us better serve our clients in the future.

Thank you again. It was our privilege to represent you.