

# Client Inquiry Form

For Conflict of Interest Check

Please provide the following information to help us determine if there are any potential conflicts of interest before we proceed with your representation.

## Client Information

- Full Name: \_\_\_\_\_
- Contact Information: \_\_\_\_\_
- Phone Number: \_\_\_\_\_
- Email Address: \_\_\_\_\_
- Mailing Address: \_\_\_\_\_

## Opposing Party Information

- Full Name: \_\_\_\_\_
- Contact Information (if known): \_\_\_\_\_
- Phone Number: \_\_\_\_\_
- Email Address: \_\_\_\_\_
- Mailing Address: \_\_\_\_\_

## Case Information

- Type of Legal Matter: \_\_\_\_\_
- Brief Description of Legal Issue: \_\_\_\_\_
- Related Parties: \_\_\_\_\_

## Prior and Current Relationships

- Have you or your business ever been represented by our firm before?
- Yes / No (circle one)

If yes, please provide details: \_\_\_\_\_

Are you aware of any relationships our firm, its attorneys, or staff have with the opposing party?

Yes / No (circle one)

If yes, please provide details: \_\_\_\_\_

## Additional Information

- Is there any other information that may help us with the conflict of interest check?  
\_\_\_\_\_

Thank you for providing this information. We will review it and get back to you promptly.

## 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  
(On law firm letterhead)**

Date: Month/Day/Year

Re: Subject of Representation/Case Name & Number, if applicable

Dear Client:

Thank you for allowing our firm to represent you in this matter. Our representation for this matter is now concluded and we are closing our file.

We will give you your original file. Please make arrangements with our office to pick up your file within 60 days of the date of this letter.

If you do not wish to retrieve your file, please complete and return the form at the bottom of this letter. If you do not pick up your file, it will be destroyed 60 days from the date of this letter.

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**OR USE THIS LANGUAGE  
IF RETAINING FILE PER YOUR FILE RETENTION POLICY**

We will retain your file for a period of \_\_\_ years, pursuant to our File Retention Policy. At the conclusion of that time, we will follow our File Retention Policy to destroy the original file without further notice to you.

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We hope this matter was concluded to your satisfaction. If we may provide legal assistance in the future to you or to you friends or family members, we hope you will contact us.

Very truly yours,

**REFUSAL OF FILE RETURN FORM**

I acknowledge that my attorney, NAME, has offered to provide my original file, in CASE OR MATTER. I do NOT wish to receive my file. I understand that if I do not receive my file at this time, it will be destroyed 60 days from the date of this letter.

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CLIENT NAME

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DATE

## 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.