

SAMPLE FILE CHECKLIST**INITIALS ATTY/STAFF****VERIFIED BY**

- | | | |
|---|-------|-------|
| <input type="checkbox"/> Initial Client Contact | _____ | _____ |
| <input type="checkbox"/> Practice Area | _____ | _____ |
| ○ List areas | _____ | _____ |
| <input type="checkbox"/> Client Inquiry Form | _____ | _____ |
| ○ Completed | _____ | _____ |
| ○ Submitted for conflicts check | _____ | _____ |
| ○ Cleared conflicts | _____ | _____ |
| <input type="checkbox"/> Client contact from | _____ | _____ |
| ○ Website | _____ | _____ |
| ○ Referral from client or another lawyer | _____ | _____ |
| ○ Social media | _____ | _____ |
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 | | |
| <input type="checkbox"/> Initial Client Meeting | _____ | _____ |
| <input type="checkbox"/> Client Intake Form | _____ | _____ |
| <input type="checkbox"/> Scheduled Initial Client Meeting | _____ | _____ |
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 | | |
| <input type="checkbox"/> Define Representation | _____ | _____ |
| <input type="checkbox"/> Engagement Letter | _____ | _____ |
| <input type="checkbox"/> Fee Contract signed | _____ | _____ |
| <input type="checkbox"/> IOLTA client folder opened | _____ | _____ |
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 | | |
| <input type="checkbox"/> Representation Deadlines | _____ | _____ |
| <input type="checkbox"/> Statute of Limitations calendared | _____ | _____ |
| <input type="checkbox"/> Court Docket deadlines recorded | _____ | _____ |
| <input type="checkbox"/> Representation tasks outlined | _____ | _____ |
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 | | |
| <input type="checkbox"/> Client Communication | _____ | _____ |
| <input type="checkbox"/> Follow up appointments and send appropriate reminders | _____ | _____ |
| <input type="checkbox"/> Update client with monthly status letter | _____ | _____ |
| <input type="checkbox"/> Send client invoice letter with billing statement | _____ | _____ |
|
 | | |
| <input type="checkbox"/> Conclude Representation | _____ | _____ |
| <input type="checkbox"/> Send File Closing Letter | _____ | _____ |
| <input type="checkbox"/> Use Post Representation Survey | _____ | _____ |
| <input type="checkbox"/> Prepare client file for electronic storage/final disposition | _____ | _____ |