



Bell & Shivas, P. C.

ATTORNEYS AT LAW

*Be Prepared to Meet With Your Attorney*



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## *Meeting Preparation Checklist*

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**2020**

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# 1

## *Introduction*



### *A well-prepared client saves time and money!*

*When first meeting with an attorney, you will undoubtedly have many questions. But it's important to realize that the attorney will need a good deal of information from you before he or she can even begin to answer those questions.*

*Make sure you've got your issue clearly summarized, but also be ready with complete and accurate contact information, any documents that may be relevant to the case, and your specific goals for representation.*



## *The Basics: Contact Information*



*Just as you would for any introduction, think of this first meeting with your attorney as a “get-acquainted” session.*

*If you have a business card, bring it; if not, bring a printed sheet of paper with essential contact information.*

*Regardless of the type of legal matter, your lawyer will want to know who you are and how to contact you. Be prepared to provide your:*

- home address*
- work address*
- employer's name and address*
- home phone number*
- work phone number*
- mobile phone number*
- fax number, and*
- email address*





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## Outline the Case



*Your attorney will want to hear a clear, concise fact-based summary of your situation or issue.*

*Often, clients will tell lawyers their stories in a choppy fashion or with the key facts and events out of order.*

*To make your consultation meeting efficient, try writing your story down as if you were communicating it to a person who had never met you before. You'll probably want to do this chronologically, identifying the key dates and names.*

*Try to keep these facts to a single page. Doing this will force you to understand the "narrative" of your case, and will help you to communicate the sequence of events and key issues to your attorney. Some important details to include in that narrative include:*

- names of the key players in your dispute*
- date the dispute or problem began*
- type of the dispute (harassment, contract, divorce)*
- key events of your dispute, including a "who, what, where, when and why" narrative, and current status of your dispute.*





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## *Where Does Your Case Fit?*



*While it may not be a required part of a preparation checklist, knowing how your case aligns with the firm's practice areas may expedite a connection to the firm's most qualified attorney.*

- Appellate Law*
- Alternative Dispute Resolution*
- Business and Commercial Law*
- Civil Rights*
- Construction Law*
- Corporate Law*
- Criminal Defense*
- Labor and Employment Law*
- Family Law*
- Litigation*
- Municipal Law and Local Government Affairs Law*
- Nonprofit and Tax Exempt Organizations*
- Personal Injury and Products Liability Law*
- Real Estate Law*
- Veterans Affairs Law*
- Wills, Trusts & Estates; Probate Litigation*



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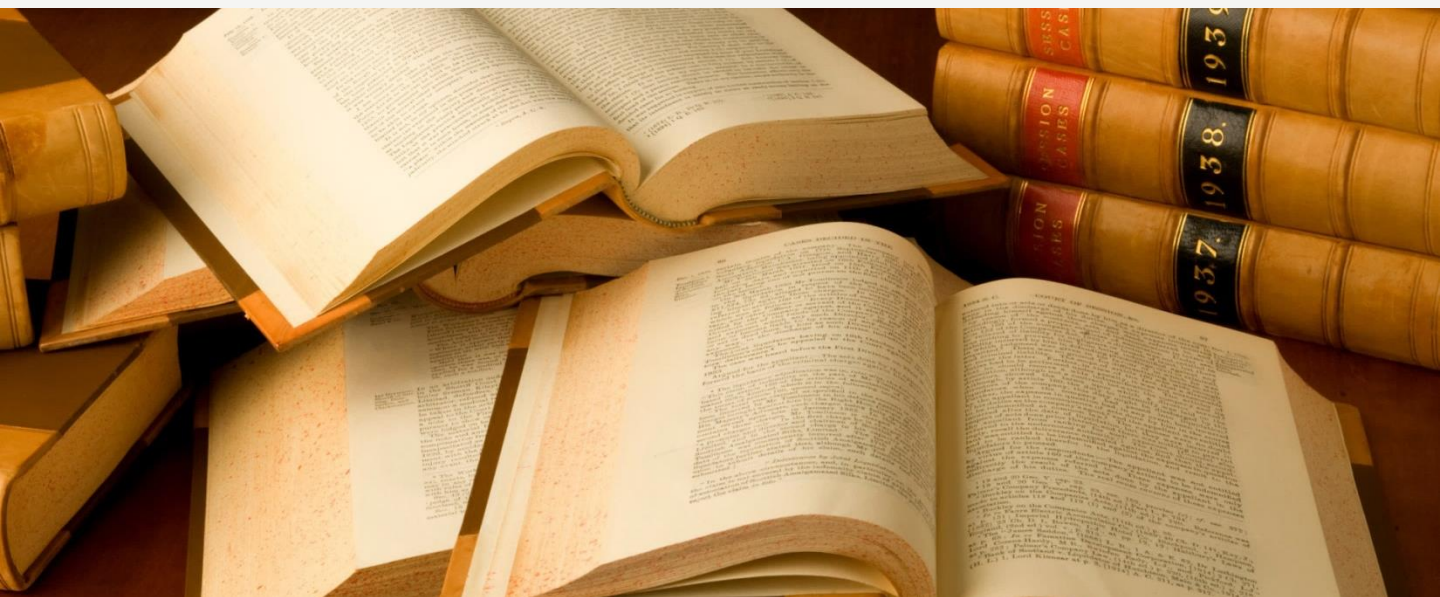
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## *Bring All Relevant Documents*



*Documentation often provides the surest path to a legal victory by demonstrating verifiable facts that support your claims.*

*Obviously, the nature of the evidence will vary dramatically from one type of case to another. As you prepare to meet with your lawyer, try to locate any of the following that might apply to your case:*

- contracts*
- financial documents correspondence*
- photographs*
- accident or police reports*
- employment materials*
- witness statements and witness contact information*

*Try to gather and copy these documents before your meeting. If you can put them into an organized binder, you will make life much easier for your attorney and reduce the hours spent (and charged for).*





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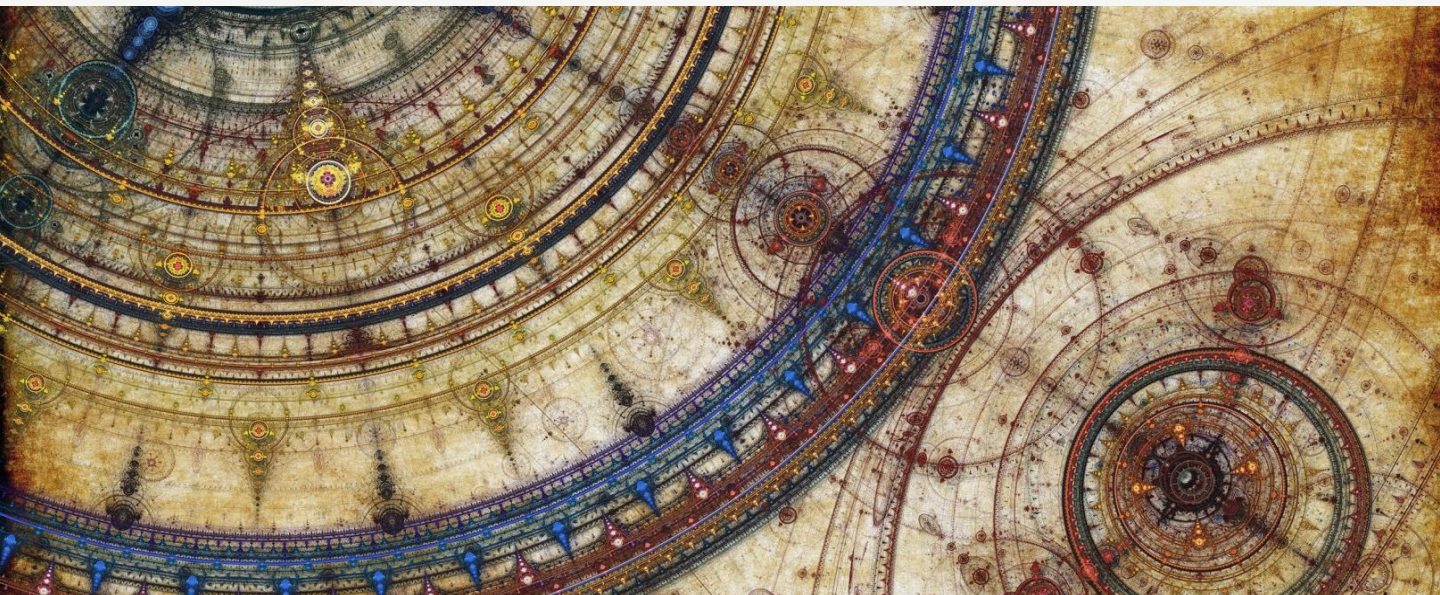
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## *Think About Goals for Representation*



### *What, exactly, do you want your lawyer to accomplish for you?*

*Obviously, your lawyer's ability to achieve your "perfect outcome" will depend on the facts and the law, but you should nevertheless prepare a list of goals that you want the lawyer to help you achieve.*

#### Typical goals might include:

- review and provide comments on a contract or legal document*
- draft a will*
- form a new company*
- respond to a legal complaint, lawsuit, or threatening letter*
- research whether you have a meritorious legal claim against another person or entity*
- draft a legal complaint or demand letter to another person or entity, or*
- negotiate a lease, contract, or other agreement*



## *Have All of Your Questions Ready*

# QUESTIONS

*Undoubtedly, you will have many questions to ask your attorney. To ensure that you get them answered satisfactorily, try listing them out ahead of time.*

*Questions you might ask your lawyer include:*

- How have other clients addressed similar issues in the past?*
- How is the other side likely to respond?*
- What would you (the lawyer) like to see in order to evaluate this case?*
- What are the options for going forward, both legal and non-legal?*
- How many similar cases have you handled?*
- What problems does the lawyer foresee with your case?*
- How would you go about handling this situation? What is the process?*
- How long will it take to bring the matter to a conclusion?*
- How would you charge for services?*
- Would you handle the case personally or pass it on to some other lawyer in the firm?*





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## *Ask About Conflict of Interest*



*While it's unlikely to be an obstacle, it's always wise to dispose of this issue in the early stages of a lawyer-client relationship.*

*Before you get too far into a meeting or conversation, the lawyer should know about any possible conflicts of interest that might prevent him or her from ethically representing you.*

*You should bring a list of people who may be witnesses or defendants in the case.*

*If, for example, the lawyer or the lawyer's firm represents anyone on the other side of the core issue, he or she will have a conflict and probably won't be able to represent you.*

*The sooner all parties know about this, the better.*



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## Have you found this information helpful?

*If so, we hope you'll consider scheduling a consultation with one of our expert attorneys. We make it a point to deliver real solutions that improve the lives of our clients.*

**Contact us for a free consultation**

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