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| --- | --- | --- | --- | --- | --- |
| **Inquiry** | **Yes** | **No** | **N/A** | **Notes/Comments** | **Note improvements needed & dates for follow up** |
| **Client Selection** |
| **1-1.** Do you generally accept most prospective clients that contact you? | [ ]  | [ ]  | [ ]  |  |  |
| **1-2.** Have you familiarized yourself with HRPC Rule 1.18- Duties to prospective clients? | [ ]  | [ ]  | [ ]  |  |  |
| **1-3.** Before accepting representation, do you have a client screening process that includes the following:**a.** What are the prospective clients’ goals? | [ ]  | [ ]  | [ ]  |  |  |
| **b.** Has the prospective client changed attorneys in the past? | [ ]  | [ ]  | [ ]  |  |  |
| **c.** Does the prospective client have unrealistic expectations? | [ ]  | [ ]  | [ ]  |  |  |
| **d.** Is the prospective client overly concerned about cost or fee shopping? | [ ]  | [ ]  | [ ]  |  |  |
| **e.** Is the prospective client’s matter appropriate for the size and scope of your practice? | [ ]  | [ ]  | [ ]  |  |  |
| **f.** Have you thoroughly discussed your fees and expenses with the prospective client in detail including the type of fee charged? | [ ]  | [ ]  | [ ]  |  |  |

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| **Inquiry** | **Yes** | **No** | **N/A** | **Notes/Comments** | **Note improvements needed & dates for follow up** |
| **Client Selection** |
| **g.** Is the prospective client able to pay all legal fees? | [ ]  | [ ]  | [ ]  |  |  |
| **h.** Do you offer the prospective client a clearly written fee agreement? | [ ]  | [ ]  | [ ]  |  |  |
| **i.** Do you have the necessary knowledge and experience in the practice area needed to serve this clientmatter? | [ ]  | [ ]  | [ ]  |  |  |
| **j.** If not, are you willing to associate with co-counsel? | [ ]  | [ ]  | [ ]  |  |  |
| **k.** Have you checked conflicts of interest? | [ ]  | [ ]  | [ ]  |  |  |
| **l.** If you discover a conflict, do you consider whether the clients or former clients can waive the conflict using HRPC Rule 1.7(b)? | [ ]  | [ ]  | [ ]  |  |  |
| **m.** Do you understand that not all conflicts can be cured with a written waiver? If it can be waived, do youconfirm in writing? | [ ]  | [ ]  | [ ]  |  |  |
| **n.** Do you have the necessary time for this client’s matter? | [ ]  | [ ]  | [ ]  |  |  |

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| **Inquiry** | **Yes** | **No** | **N/A** | **Notes/Comments** | **Note improvements needed & dates for follow up** |
| **Client Selection** |
| **o.** Is the prospective client realistic about their case outcome? | [ ]  | [ ]  | [ ]  |  |  |
| **p.** Does the prospective client want to win at all costs? | [ ]  | [ ]  | [ ]  |  |  |
| **q.** Does the prospective client think they know as much about the law as you? | [ ]  | [ ]  | [ ]  |  |  |
| **r.** Do you avoid making any guarantees or suggestions of the case outcome to prospective clients? | [ ]  | [ ]  | [ ]  |  |  |