|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Inquiry** | **Yes** | **No** | **N/A** | **Notes/Comments** | **Note improvements needed & dates for**  **follow up** |
| **Accepting New Cases** | | | | | |
| 1. After accepting representation:   **a.** Do you use a client intake form to record all the necessary information for this client’s matter? |  |  |  |  |  |
| **b.** Do you give your new clients the time and opportunity to ask questions about your arrangements or their  case? |  |  |  |  |  |
| **c.** Do you ask for an advanced payment on fees? |  |  |  |  |  |
| **d.** Do you introduce your new client to your staff? |  |  |  |  |  |
| **e.** Do you thoroughly explain your telephone and email policies to your new clients? |  |  |  |  |  |
| **f.** Do you offer clients a folder to keep documents and copies of communications about their case? |  |  |  |  |  |
| **g.** Did you open a file for the client including the client intake form, attorneys’ notes of initial meeting, copy of fee agreement and open trust account client ledger if necessary. |  |  |  |  |  |

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| **Inquiry** | **Yes** | **No** | **N/A** | **Notes/Comments** | **Note improvements needed & dates for follow up** |
| **Accepting New Cases** | | | | | |
| **h.** Do you thank clients in person and in writing for choosing your firm? |  |  |  |  |  |