

ENGAGEMENT AGREEMENT CHECKLIST

1. Specify the set fee and/or rate per hour and distinguish/explain the difference between professional fees and out-of-pocket expenditures.
2. Describe the specific legal services for which the firm is being retained.
3. When appropriate, include a description of services that are not being provided.
4. Identify the responsibilities of the law firm and those of the client.
5. Identify who will be working on the case, their title and their rate per hour, if applicable, in addition to the responsible attorney (i.e., associates, legal assistants, investigators, etc. REMIND YOUR CLIENTS THAT LEGAL ASSISTANTS ARE NOT ATTORNEYS AND, THEREFORE, WILL NEVER BE GIVING LEGAL ADVICE!!).
6. Include a reminder that no promises or guarantees have been made regarding the outcome of the case.
7. State clearly what, if any, late charges will be assessed for overdue payments.
8. Remind of confidentiality between attorney and client.
9. Explain your withdrawal policy when clients fail to pay any fees due, fail to cooperate, etc.
10. Explain your procedures for returning phone calls
11. Explain to whom they can voice any concerns or dissatisfactions if they do not feel comfortable discussing such with the responsible attorney
12. EXPRESS YOUR APPRECIATION FOR THEIR GIVING YOU THE OPPORTUNITY TO BE OF SERVICE TO THEM!!