**General Checklist**

File: Date Opened:

Rule out conflicts of interest.

Open file.

Calendar deadlines. Prescription date?

Send engagement letter.

Sign written fee agreement.

Make client trust account deposit.

Investigate.

Recommend action to client.

Obtain client approval of action.

Complete litigation or transaction.

Update client.

Do follow-up.

Collect fees and expenses.

Terminate representation ethically.

Send trust accounting.

Send disengagement and file surrender letter.

Purge, close, surrender and archive file.

Caveat: Supplement with detailed checklists!

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