**Establishing the Attorney-Client Relationship Checklist**

Use this checklist to ensure that you are taking all the proper steps to successfully establish the attorney-client relationship or decline representation.

Have receptionist or staff member complete initial section of Consultation Form.

Have staff member do initial conflicts check, but still make any judgment calls yourself.

Review the Consultation Form to determine whether to refer the case or to have the receptionist set the appointment.

Have the prospective client complete the Consultation Form when she arrives for the appointment.

Review the Consultation Form immediately prior to interviewing the potential client.

Do full consultation with the prospective client, including completion of substantive interview forms for certain areas of the law.

Explain to the prospective client whether the firm will accept or decline representation, the scope of the representation, the fee arrangement, and what is still needed from the client.

Send engagement or non-engagement letter to the prospective client.

If you agree to handle a new matter, send another engagement letter to reflect the additional representation.