



LEGAL CHECKLIST

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LEGAL ISSUES CHECKLIST

DATE: _____

№	ACTIVITIES	<input checked="" type="checkbox"/>
A	Identify the Legal Issue	
1	Clearly define the legal problem you are facing.	
2	Determine the type of lawyer you need based on the issue (e.g., criminal, family, immigration).	
B	Gather Documentation	
1	Collect all relevant documents related to your case (e.g., contracts, emails, receipts).	
2	Organize these documents chronologically or by category for easy reference.	
3	Create a timeline. Make sure to write down everything that happened, time, date, people who were present. DO NOT SHARE WITH ANYONE OTHER THAN YOUR LAWYER	
C	Understand Your Rights and Responsibilities	
1	Research your legal rights and obligations regarding the issue.	
2	Use reliable sources such as government websites, legal aid organizations, or legal libraries.	
D	Set a Budget	
1	Determine how much you can afford to spend on legal fees.	
2	Consider potential additional costs (e.g., court fees, expert witnesses).	
3	Look into legal aid or pro bono services if necessary.	
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HIRING A LAWYER

PAGE 1

DATE: _____

№	ACTIVITIES	<input checked="" type="checkbox"/>
A	Determine Your Legal Needs	
1	Identify the type of legal issue you are facing (e.g., criminal, family, business)	
2	Choose the right type of lawyer specializing in your legal matter.	
B	Research Potential Lawyers	
1	Look for lawyers with expertise in your legal issue.	
2	Check online reviews, ratings, and testimonials.	
3	Ask for recommendations from friends, family, or colleagues.	
C	Verify Credentials and Experience	
1	Ensure the lawyer is licensed and in good standing with the local bar association.	
2	Review the lawyer's experience, particularly with cases similar to yours.	
3	Check for any disciplinary actions or complaints.	
D	Schedule Initial Consultations	
1	Arrange consultations with multiple lawyers to compare.	
2	Prepare a list of questions to ask during the consultation	
3	Discuss your case and evaluate the lawyer's communication style and approach.	
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HIRING A LAWYER

PAGE 2

DATE: _____

№	ACTIVITIES	<input checked="" type="checkbox"/>
E	Discuss Fees and Costs	
1	Inquire about the lawyer's fee structure (hourly rate, flat fee, contingency fee).	
2	Ask about additional costs (e.g., court fees, administrative costs).	
3	Get a written estimate of total costs and payment terms.	
F	Evaluate Communication and Availability	
1	Ensure the lawyer is accessible and responsive.	
2	Confirm how you will communicate (e.g., phone, email, in-person meetings).	
3	Ask about response times for queries and updates.	
G	Review the Retainer Agreement	
1	Carefully read the retainer agreement before signing.	
2	Ensure it outlines the scope of work, fees, and payment schedule.	
3	Clarify any terms or conditions you do not understand.	
H	Trust Your Instincts	
1	Choose a lawyer you feel comfortable with and trust.	
2	Ensure you are confident in their ability to represent you effectively.	
I	Follow Up and Stay Informed	
1	Be proactive in providing any requested information or documents.	
2	Keep a personal record of all communications and developments	
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DURING THE LEGAL PROCESS PAGE 1

DATE: _____

№	ACTIVITIES	<input checked="" type="checkbox"/>
A	Stay Informed and Organized	
1	Keep all legal documents, correspondence, and notes organized.	
2	Create a dedicated folder or binder for your case.	
3	Maintain a calendar for important dates (court dates, meetings, deadlines).	
B	Communicate Regularly with Your Lawyer	
1	Schedule regular updates with your lawyer to discuss case progress.	
2	Be proactive in reaching out if you have questions or concerns.	
3	Ensure your lawyer has all necessary information and documents.	
C	Follow Your Lawyer's Advice	
1	Trust your lawyer's expertise and follow their recommendations.	
2	Avoid discussing your case with others without your lawyer's approval.	
3	Do not take any legal action without consulting your lawyer first.	
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DURING THE LEGAL PROCESS PAGE 2

DATE: _____

№	ACTIVITIES	<input checked="" type="checkbox"/>
D	Prepare for Court Appearances	
1	Dress appropriately and arrive early for court dates.	
2	Understand court procedures and what to expect.	
3	Practice any statements or testimony with your lawyer.	
E	Review All Documents Carefully	
1	Read all legal documents, filings, and correspondence thoroughly.	
2	Ensure you understand the content before signing anything.	
3	Ask your lawyer for clarification on any confusing terms or conditions.	
F	Keep Track of Legal Expenses	
1	Monitor your legal expenses and keep receipts for all payments.	
2	Review billing statements from your lawyer for accuracy. Billing statement also referred to as Statement of Account	
3	Discuss any discrepancies or concerns with your lawyer promptly.	
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DURING THE LEGAL PROCESS PAGE 3

DATE: _____

№	ACTIVITIES	<input checked="" type="checkbox"/>
G	Follow All Court Orders and Deadlines	
1	Comply with all court orders, instructions, and deadlines.	
2	Submit required documents and information on time.	
3	Notify your lawyer immediately if you encounter any issues	
H	Stay Calm and Patient	
1	Understand that legal processes can be lengthy and complex.	
2	Remain patient and trust the process.	
3	Manage stress through healthy coping mechanisms (exercise, hobbies, support groups).	
I	Be Honest and Transparent	
1	Provide your lawyer with all relevant information, even if it seems unfavorable.	
2	Be truthful in all communications and testimony.	
3	Update your lawyer on any new developments or changes in your situation.	
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