

ATTORNEY-CLIENT MATTERS FORMS LIST

This volume includes more than 30 forms that may be used to manage the attorney-client relationship. There are five types of Attorney Fee Agreements, including a Pro Bono Representation Agreement. It also includes a Client Information Form, commonly used letters and authorizations for releases, and settlement disclosures, and disbursement statements.

INFORMATION WORKSHEETS

Client Information Form
Witness Telephone Interview Sheet
Witness Information Sheet

LETTERS & NEW CLIENT FORMS

Letter to Confirm Appointment and Directions to Office
Letter to Prospective Client Declining Representation
New Client Letter
Receipt for Client's Documents
Transmittal Letter to New Client
Letter to Avoid Conflict of Interest
Letter Advising of Case Referral and Referral Fee
Letter to Witness Requesting Information
Letter to Client - Confirming Decision Contrary to Legal Advice
Letter to Client - Confirming Decision Not to Contest Case
Letter to Client When Attorney Cannot Contact Client
Letter to Client - Advising in Favor of Offer
Letter to Client - Advising Against Offer
Letter Withdrawing as Attorney of Record Prior to Suit
Letter to Client - Demanding Payment on Account
Authorization for Release of Records - Medical and Billing (HIPAA)
Authorization for Release of Records - Financial Institution
Authorization for Release of Records - Employment
Authorization for Release of Records - General

FFA AGREEMENTS

Attorney Fee Letter Agreement
Attorney Fee Agreement for Hourly Clients - Short form
Attorney Fee Agreement for Hourly Clients
Attorney Fee Agreement for Contingency Cases - Mass R Prof C 1.5(f)
Pro Bono Representation Agreement

RELEASE & CLOSING DOCUMENTS

Settlement Disclosure Statement and Acknowledgment
Settlement Disbursement and Release of Attorney
Release of Attorney Prior to Settlement or Distribution of Funds
Letter and Client Satisfaction Questionnaire

