

Consultation preparation

A simple worksheet to help you organize your first conversation.

01 Your contact preferences

Your name

Phone number

Email address

Preferred contact method

Safe time to contact you

May the office leave a voicemail?

02 Your appointment

General topic

Appointment day / time, if arranged

If you have an upcoming hearing or deadline, call the office to discuss it.

03 Questions to bring

Keep this brief; discuss case details privately with the office.

04 Before you meet

- ☐ Gather relevant papers and a short list of important dates.
- ☐ Ask the office which documents to bring and how to share them.

For your own preparation. Filling in or saving this worksheet does not send it to the office or file it with a court. Please contact the office before sending confidential documents. Preparing a worksheet does not by itself mean the firm has agreed to represent you.