

Your appointment checklist

Gather what you already have. The office will tell you what is needed.

01 Start here

- ☐ Write down your main questions and what you want to discuss.
- ☐ Note important dates, including any hearing or document deadline.
- ☐ Gather existing court papers, orders, agreements, and relevant correspondence.
- ☐ Confirm the appointment time, location, and any communication needs.

02 Depending on your matter

These are examples to help you prepare. Gather only what applies to your situation.

Family law

- ☐ Existing orders and written agreements
- ☐ Financial documents requested by the office
- ☐ A short list of dates and questions

Personal injury / auto accident

- ☐ Available incident or accident information
- ☐ Relevant photographs and correspondence
- ☐ Insurance and billing records, if requested

Estate / probate

- ☐ Existing wills, trusts, and related documents
- ☐ A general list of property and relevant contacts
- ☐ Letters or notices relating to the estate

Real estate

- ☐ Deeds, agreements, and relevant notices
- ☐ Property-related correspondence
- ☐ Questions about the documents or issue

Keep your documents together for the appointment. Contact the office before sending confidential records or originals. This checklist helps organize a consultation; it does not determine what must be filed or establish representation.

Notes for your conversation

Bring your questions, then use this page to record the next steps discussed.

03 Questions I want to ask

04 Items to confirm with the office

- ☐ Which documents are needed, and how should I provide them?
- ☐ What are the consultation fees and possible next steps?
- ☐ What is the best way to contact the office about my matter?
- ☐ What should I do about any date or deadline I have already received?

05 My notes / next steps

Use this page for your own records. Call the office if you need to clarify instructions.