Client Consultation Checklist

- Bring all relevant documents (court filings, financial statements, agreements, tax notices).
- Prepare a list of your goals and main concerns.
- Write down any questions you want answered.
- Identify key dates, deadlines, or events related to your matter.
- Bring a list of names and contact information for key individuals (opposing party, beneficiaries, witnesses).
- Gather recent pay stubs, tax returns, or financial records if applicable.
- Bring any previous correspondence with courts, agencies, or attorneys.
- Note your preferred outcomes and any non-negotiables.
- Be prepared to discuss timelines and your availability.
- Bring identification if needed for notarization or verification.