

How to Prepare for Your First Meeting with an Attorney



By Joseph J. Bell, Jr. October 10, 2017

You've found yourself in a situation where you need an attorney. You've done some research and scheduled an appointment with a prospective attorney. Now you need to prepare to make that meeting as productive as possible. Here are some tips on how to do it.

The Basics: Contact Information

Just as you would for any introduction, think of this first meeting with your attorney as a “get-acquainted” session. If you have a business card, bring it; if not, bring a printed sheet of paper with essential contact information.

Regardless of the type of legal matter, your lawyer will want to know who you are and how to contact you. Be prepared to provide your:

- home address
- work address
- employer's name and address
- home phone number
- work phone number
- mobile phone number

- fax number, and
- email address

Outline The Case

Your lawyer will surely ask you to describe the key facts leading up to your decision to meet with an attorney. Often, clients will tell lawyers their stories in a choppy fashion or with the key facts and events out of order.

To make your consultation meeting efficient, try writing your story down as if you were communicating it to a person who had never met you before. You'll probably want to do this chronologically, identifying the key dates and names.

Try to keep these facts to a single page. Doing this will force you to understand the "narrative" of your case, and will help you to communicate the sequence of events and key issues to your attorney. Some important details to include in that narrative include:

- names of the key players in your dispute
- date the dispute or problem began
- type of the dispute (harassment, contract, divorce)
- key events of your dispute, including a "who, what, where, when and why" narrative, and current status of your dispute.

Bring All Relevant Documents

Obviously, the nature of the evidence will vary dramatically from one type of case to another. As you prepare to meet with your lawyer, try to locate any of the following that might apply to your case:

- contracts
- financial documents correspondence
- photographs
- accident or police reports
- employment materials
- witness statements and witness contact information

Try to gather and copy these documents before your meeting. If you can put them into an organized binder, you will make life much easier for your attorney and reduce the hours spent (and charged for).

Discuss Goals for Representation

What, exactly, do you want your lawyer to accomplish for you? Obviously, your lawyer's ability to achieve your "perfect outcome" will depend on the facts and the law, but you should nevertheless prepare a list of goals that you want the lawyer to help you achieve.

Typical goals might include:

- review and provide comments on a contract or legal document
- draft a will
- form a new company
- respond to a legal complaint, lawsuit, or threatening letter

- research whether you have a meritorious legal claim against another person or entity
- draft a legal complaint or demand letter to another person or entity, or
- negotiate a lease, contract, or other agreement

Have All of Your Questions Ready

Undoubtedly, you have many questions you'll want to ask your attorney. To ensure that you get all these answered, try listing them out ahead of time.

Questions you might ask your lawyer include:

- How have other clients addressed similar issues in the past?
- How is the other side likely to respond?
- What would you (the lawyer) like to see in order to evaluate this case?
- What are the options for going forward, both legal and non-legal?
- How many similar cases have you handled?
- What problems does the lawyer foresee with your case?
- How would you go about handling this situation? What is the process?
- How long will it take to bring the matter to a conclusion?
- How would you charge for services?
- Would you handle the case personally or pass it on to some other lawyer in the firm?

Ask About any Conflict of Interest

While it's unlikely this will be an obstacle, it's always wise to dispose of the issue anyway. Before you get too far into a meeting or conversation, the lawyer should know about any possible conflicts of interest that might prevent him or her from ethically representing you.

You should bring a list of people who may be witnesses or defendants in the case. If, for example, the lawyer or the lawyer's firm represents anyone on the other side of the core issue, he or she will have a conflict and probably won't be able to represent you.

The sooner all parties know about this, the better.

Conclusion

Strong preparation will save time and money. It will also ensure that all of your questions have been answered and that your attorney has all of the information necessary to represent you successfully.

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