[Sample Checklist of Tasks for Limited Scope Representation]

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| --- | --- | --- | --- |
| TASK (PAGE 1/3) | ATTORNEY TO DO: | DATE  COMPLETED: | CLIENT TO DO: |
| Draft papers to [describe legal action] |  |  |  |
| File and serve papers |  |  |  |
| Draft motions [describe] |  |  |  |
| Draft affidavits and declarations |  |  |  |
| Analyze case and advise of legal rights |  |  |  |
| Procedural advice |  |  |  |
| Formulating strategy and tactics |  |  |  |
| Investigate facts; which issues? |  |  |  |
| Obtain documents; which ones? |  |  |  |
| Draft correspondence |  |  |  |
| Review correspondence and pleadings |  |  |  |
| Appear in court [explain limits] |  |  |  |

Attorneys Initials Clients Initials

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| TASK (PAGE 2/3) | ATTORNEY TO DO: | DATE  COMPLETED: | CLIENT TO DO: |
| Calculate child/spousal support/damages |  |  |  |
| Prepare subpoenas |  |  |  |
| Take or defend depositions |  |  |  |
| Review depositions and documents obtained from others |  |  |  |
| Legal research and analysis [list topics] |  |  |  |
| Respond to discovery requests |  |  |  |
| Draft or analyze settlement proposals |  |  |  |
| Contact witnesses/experts |  |  |  |
| Draft orders and judgments |  |  |  |
| Outline testimony |  |  |  |
| Trial, negotiation, settlement conference preparation |  |  |  |
| Review orders and judgments client drafts |  |  |  |
| Draft orders |  |  |  |

Attorneys Initials Clients Initials

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| TASK (PAGE 3/3) | ATTORNEY TO DO: | | DATE  COMPLETED: | CLIENT TO DO: |
| Draft disclosure documents |  | |  |  |
| Advise regarding appeal |  | |  |  |
| Enforce orders |  | |  |  |
| Draft other papers as necessary |  | |  |  |
| Other |  | |  |  |
| Other |  | |  |  |
| Other |  | |  |  |
| Other |  | |  |  |
|  | | | | |
| Dated: Attorney signature | | Dated: Client signature | | |