

Client Bill of Rights

As your consultant/advisor, I agree to do the following:

1. Provide considerate and respectful legal services.
2. Only work on your behalf if I have the skills, knowledge and experience necessary to provide excellent service.
3. “Tell it like it is.” To be open and honest with you in all transactions.
4. To act on your behalf in the most dignified manner possible and conform to all legal and ethical guidelines.
5. Communicate. That means I will be an active listener, return phone calls as soon as possible and provide regular case status updates.
6. Work on your matter in a timely manner so that it may be resolved as expeditiously as possible, with as little conflict as possible.
7. Place all fee agreements in writing.
8. Fairly bill you only for actual attorney time, fees, and costs incurred on the case and to provide detailed billing statements.
9. Obtain your written authorization before negotiating a settlement or other form of resolution to your case.
10. Preserve your confidences, honor your privacy, and only disclose the facts of your case, or other matters, to persons on a ‘need-to-know’ basis.
11. Remain current on the laws and legal trends related to your matter.
12. Properly maintain all financial books and records related to your matter and account, including trust accounts, billing statements, cost ledgers, attorney ledgers and liens.
13. Properly maintain client trust funds, avoid commingling, misappropriation, and refund any unearned fees or retainers.
14. Maintain and store your records in a place which is secure from theft and unnecessary access, and which is protected against the possibilities of fire, water damage and the like.
15. To promptly release client files upon demand.
16. *Additional Request(s) by the Client:*

Date: _____

Consultant’s Signature: _____

Date: _____

Client’s Signature: _____