BANKRUPTCY CONSULTATION / 01

BUILD A NON-SENSITIVE CONSULTATION BRIEF

Use neutral labels only. Keep financial, identity, account, creditor, tax and case details out of this workbook.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Consultation A / general topic label / no case facts

Question A / what I want counsel to explain privately

Private Source List A / category exists / no contents or amounts

Time-sensitive question exists / ask counsel / no deadline calculation

Representation Stage A / consultation, preparation, filing or representation question

Secure Route A / delivery-method question / no records attached

Preparation only. Not legal, bankruptcy, tax, financial, filing, form, deadline or court advice; no attorney-client relationship. Keep all case facts, amounts and private records out.

BANKRUPTCY CONSULTATION / 02

MAP SOURCES, ROLES AND FOLLOW-UP

List source categories, not facts. Ask the firm to identify secure routes and stage-specific responsibilities.

Existing Source A / category / date range question / no document contents

Attorney or firm role / Consultation A responsibility question

Secure delivery method / recipient-role question / not used yet

Official public-information reference / question for counsel

Third-party role or referral question / no private contact details

Written follow-up / owner / secure route / confirmation question

Preparation only. Not legal, bankruptcy, tax, financial, filing, form, deadline or court advice; no attorney-client relationship. Keep all case facts, amounts and private records out.

BANKRUPTCY CONSULTATION / 03

CHECK THE CONSULTATION PACKET

Tick what is organized. These checks do not create representation or approve any legal, financial or filing decision.

- [ ] Consultation and question labels contain no private case facts
- [ ] No balances, income, assets, expenses or creditor details are recorded
- [ ] Existing source categories are listed without document contents
- [ ] Secure record routing is a question for the attorney or firm
- [ ] Consultation, preparation, filing and representation roles are separated
- [ ] Chapter, form, eligibility and deadline decisions are left to counsel
- [ ] Written engagement scope and exclusions are requested
- [ ] No legal outcome or attorney-client relationship is assumed

Question still open / counsel to ask privately

Private source category / secure-route question still open

Engagement-stage or written follow-up question still open

Preparation only. Not legal, bankruptcy, tax, financial, filing, form, deadline or court advice; no attorney-client relationship. Keep all case facts, amounts and private records out.

BANKRUPTCY CONSULTATION / 04

QUESTIONS FOR A BANKRUPTCY ATTORNEY

Ask each attorney the same privacy, role, scope and follow-up questions. Discuss all sensitive facts privately.

Consultation: what will you address first, and what needs private review?

Sources: which existing record categories, if any, should I gather?

Privacy: how and to which role should requested records be delivered?

Decisions: how will chapter, form, eligibility and deadline questions be handled?

Stages: what preparation, filing and representation work is included or excluded?

Follow-up: how will the engagement scope and unresolved questions be confirmed?

Preparation only. Not legal, bankruptcy, tax, financial, filing, form, deadline or court advice; no attorney-client relationship. Keep all case facts, amounts and private records out.

BANKRUPTCY CONSULTATION / 05

COMPARE THE SAME CONSULTATION BRIEF

Use Attorneys A and B with the same non-sensitive questions. Clarify differences before choosing counsel.

Attorneys A / B / consultation dates / proposal or engagement references

Consultation scope and decision process - A / B

Secure-record route and representation stages - A / B

Written exclusions, follow-up owners and unresolved questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Bankruptcy Attorney request. Share a non-sensitive consultation-question brief so participating attorneys can compete with proposals. Compare experience, written representation scope, timing, fees and fit. A private consultation, conflicts check and secure financial-record review may be needed before an engagement proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A private consultation, conflicts check and secure financial-record review may be needed before an engagement proposal.

Planning guide: https://www.pickyourpro.ai/services/attorney-bankruptcy

U.S. Courts: Bankruptcy Basics (official reference)

U.S. Courts: Filing Without an Attorney (official reference)

Preparation only. Not legal, bankruptcy, tax, financial, filing, form, deadline or court advice; no attorney-client relationship. Keep all case facts, amounts and private records out.