GENERAL LEGAL HELP / 01

ORGANIZE A NON-CONFIDENTIAL MATTER SUMMARY

Use general facts only. Save sensitive details for a private consultation.

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

General issue in plain language, without privileged or sensitive details

Result, decision, or type of help I hope to discuss with a lawyer

People, businesses, agencies, courts, insurers, or organizations involved

Location or jurisdiction connected to the matter, if known

Current status: inquiry, notice received, dispute, negotiation, filing, hearing, or other

Immediate concerns or dates to ask a lawyer about - not my own deadline calculation

Preparation only. Not legal advice, a conflicts check, deadline calculation, or attorney-client relationship.

GENERAL LEGAL HELP / 02

MAP PEOPLE, DATES, DOCUMENTS, AND GOALS

Prepare a private inventory; do not upload sensitive records to a public request.

Private chronology of known events, communications, notices, meetings, filings, and dates

Documents already available and where the originals or secure copies are kept

Documents, messages, recordings, or records that may exist but are not yet collected

Other professionals, agencies, courts, insurers, employers, or organizations already contacted

Decisions already made, offers received, agreements signed, or steps already taken

Questions about preserving records, urgent action, notices, or timing for a lawyer to answer

Preparation only. Not legal advice, a conflicts check, deadline calculation, or attorney-client relationship.

GENERAL LEGAL HELP / 03

PREPARE FOR A PRIVATE CONSULTATION

Tick what is ready, then ask how to share details securely.

- [ ] My public summary contains only general, non-confidential facts
- [ ] Names for a conflicts check are organized
- [ ] A private chronology is available
- [ ] Documents are inventoried without attaching sensitive copies publicly
- [ ] I will ask before sending privileged, personal, medical, financial, or identifying information
- [ ] I have not tried to calculate legal deadlines or decide strategy from this worksheet
- [ ] My desired result and constraints are written in plain language
- [ ] I will record scope, fees, expenses, responsibilities, and engagement terms in writing

Conflicts-check names and relationships I am prepared to provide before sensitive discussion

Secure consultation or document-sharing method the lawyer has confirmed

Top three decisions or questions I want the consultation to address

Preparation only. Not legal advice, a conflicts check, deadline calculation, or attorney-client relationship.

GENERAL LEGAL HELP / 04

QUESTIONS TO ASK A LAWYER

Record the lawyer's answers and the limits of the proposed engagement.

Experience: what related matters do you handle, and what practice focus is relevant here?

Confidentiality process: what do you need for conflicts, and when and how should I share details?

Scope: what work, advice, negotiation, filing, appearance, or follow-up is included or excluded?

Team and communication: who works on the matter, who contacts me, and how are decisions made?

Fees and expenses: how are they structured, billed, documented, and changed if scope changes?

Written terms: what responsibilities, records, ending, withdrawal, transition, and open issues apply?

Preparation only. Not legal advice, a conflicts check, deadline calculation, or attorney-client relationship.

GENERAL LEGAL HELP / 05

COMPARE THE SAME REPRESENTATION SCOPE

Use A and B in every box. Different scopes need clarification before comparison.

Lawyer or firm A / B / consultation date / conflicts process completed?

Relevant experience, proposed representation, included tasks, exclusions, and team - A / B

Communication, client responsibilities, decision points, timing information, and open questions - A / B

Fees, expenses, billing, written engagement terms, ending or transition process, and fit - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start a General Legal Help request if you choose; this step is optional. Share only a general, non-confidential description until a lawyer explains conflicts and private communication. Participating pros can compete with proposals. Compare relevant experience, representation scope, team, communication, fees and expenses, written terms, and fit. Sending a request does not create an attorney-client relationship.

One request. Every pro's best offer.

Start a request

Participation varies. A private consultation and conflicts check may be needed before an engagement proposal.

Planning guide: https://www.pickyourpro.ai/services/attorney-general-legal-help

USAGov: Find a lawyer and affordable legal aid (official reference)

American Bar Association: Questions to Ask a Lawyer (official reference)

Preparation only. Not legal advice, a conflicts check, deadline calculation, or attorney-client relationship.