PERSONAL INJURY CONSULTATION / 01

TRACK THE LAWYER'S RECORD REQUESTS

Use neutral labels for requests already made. Keep records and private instructions elsewhere.

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

Item A: lawyer's request reference / neutral record label / requested contact role

Item A: held or still requested / secure-instruction reference, without access details

Item A: sent or receipt status / confirmation reference / unanswered review question

Item B: lawyer's request reference / neutral record label / requested contact role

Item B: held or still requested / secure-instruction reference, without access details

Item B: sent or receipt status / confirmation reference / unanswered review question

Preparation only. Not legal or medical advice, case assessment, evidence or deadline guidance, or representation. Keep case and medical details out. Raise urgent questions directly with a lawyer.

PERSONAL INJURY CONSULTATION / 02

CLARIFY ROLES WITHOUT ASSUMING TASKS

Record what the lawyer has discussed. Blank rows are questions, not investigation instructions.

Task A: lawyer's neutral task reference / assigned role, if confirmed / open question

Task A: status-update contact role / agreed communication method / next check-in

Task B: lawyer's neutral task reference / assigned role, if confirmed / open question

Task B: status-update contact role / agreed communication method / next check-in

Record handoff contact versus engagement contact / how to route each question

Received versus reviewed versus engagement confirmed / references still needed

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PERSONAL INJURY CONSULTATION / 03

CHECK THE HANDOFF CONVERSATION

Tick what has been clarified, not what you assume the lawyer has accepted or completed.

- [ ] Neutral labels replace names, allegations and medical details
- [ ] Each record row points to an actual lawyer request
- [ ] Secure-transfer instructions are referenced, not copied here
- [ ] Receipt and review statuses are recorded separately
- [ ] Investigation responsibilities were discussed, not inferred
- [ ] Record and engagement contacts have distinct roles
- [ ] The update and urgent-question process has been asked about
- [ ] Original instructions and engagement documents are kept privately

Outstanding record-request label / responsible contact role / question to raise

Unclear task or status / lawyer's clarification / instruction reference kept privately

Engagement question / contact role / written confirmation still needed

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PERSONAL INJURY CONSULTATION / 04

QUESTIONS FOR THE LAWYER

Ask privately about the proposed engagement. Do not use this page to disclose case facts.

Fit: what experience and role would your team bring to this type of matter?

Requests: what records are wanted now, and how should they be transferred privately?

Review: who confirms receipt, reviews items and communicates outstanding requests?

Investigation: who handles the work, and what should I ask before taking any action?

Updates: who handles the matter, routine contact and urgent questions?

Engagement: what scope, fees, expenses, exclusions and responsibilities are proposed?

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PERSONAL INJURY CONSULTATION / 05

COMPARE THE PROPOSED ENGAGEMENT

Use Firm A and B. Compare written terms, not assumed results or receipt of documents.

Firm A / B / proposal dates / same non-confidential consultation need

Proposed service scope, team roles and investigation responsibilities - A / B

Record requests, secure handoff, review and communication process - A / B

Written fee and expense terms, exclusions and unresolved engagement questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai if you choose, then start a Personal Injury Attorney request. Share only a non-confidential description of your consultation needs so participating pros can compete with proposals. Compare proposed scope, communication and written engagement terms. A request or proposal does not establish representation.

One request. Every pro's best offer.

Start a request

Participation varies. A private consultation, conflicts check and record review may be needed before engagement.

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

American Bar Association: questions to ask a lawyer (official reference)

American Bar Association: personal injury claims (official reference)

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