YOUR CONSULTATION, ORGANIZED.

A free worksheet to help you prepare, whether you are researching or ready to hire.

01 / MY SITUATION AT A GLANCE

Preferred name / consultation date

California county / other states or countries connected to my situation

Where I am now: researching, served papers, filed, negotiating, or other

Important dates or papers I want the attorney to review

My three biggest questions or priorities

What I most want help with at this first meeting

BEFORE YOU SHARE

Keep completed pages private. Do not add Social Security or full account numbers.

Use an email inbox you can safely access. Ask the firm how to share documents securely.

A consultation request does not mean a lawyer has agreed to represent you.

Preparation only. Not legal advice, a court form, or a substitute for an attorney.

DOCUMENT GATHERING CHECKLIST

Ask the attorney which items apply and what time period they need.

02 / FIND WHAT YOU HAVE - NOTE WHAT IS MISSING

Gather only records you can lawfully access. This is not a court disclosure checklist.

- [ ] Papers already filed or received, plus any proof of delivery / service
- [ ] Existing court orders, hearing notices, or written agreements
- [ ] Marriage or domestic partnership records; any marital agreements
- [ ] Recent income records and tax returns
- [ ] Bank, investment, retirement, and benefit statements
- [ ] Home or other property records and mortgage statements
- [ ] Credit cards, loans, and other debt statements
- [ ] Business ownership or self-employment records, if relevant
- [ ] Insurance policies and coverage information
- [ ] Household expenses and recurring commitments
- [ ] Parenting schedules and child-related expenses, if relevant
- [ ] A short timeline of events I want to discuss

Missing record / where I can request it / question for the attorney

The firm's secure sharing method and requested document period

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QUESTIONS TO ASK YOUR ATTORNEY

Circle your priorities. Use the response space for key points, not a full transcript.

03 / A MORE USEFUL FIRST CONVERSATION

Fit and responsibility

Who would handle my matter, and what similar matters have you handled?

Notes

My next step

What needs attention first, and are there dates you need to check now?

Notes

Options and roles

What approaches could fit? Would you represent me, advise me, or mediate?

Notes

Scope and exclusions

Which tasks and stages are covered, and what would need a new agreement?

Notes

Billing and communication

How are fees, expenses, updates, and approval for extra work handled?

Notes

Before I decide

What should I read or clarify in the engagement agreement before signing?

Notes

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WHAT MATTERS TO MY FAMILY

Optional prompts for your private discussion. Skip anything that does not apply.

04 / PRIORITIES, NOT PROPOSED LEGAL OUTCOMES

Children: routines, school, care needs, and practical concerns to discuss

Housing and everyday stability: what I need help planning for

Property, debts, or business interests I need help understanding

Privacy, communication, or safety concerns to raise privately

Questions about support or coordination with other professionals

You do not need to reach an agreement or classify property to use this worksheet.

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COMPARE THE FIT, NOT JUST THE FEE

Use the same questions for each firm. Record what they actually tell you.

05 / MY ATTORNEY COMPARISON

Attorney / firm / consultation date

Firm A

Firm B

Relevant experience and who handles my matter

Firm A

Firm B

Proposed approach and first step

Firm A

Firm B

Included work and important exclusions

Firm A

Firm B

Fee basis, expenses, and written agreement

Firm A

Firm B

Updates, contact person, and response expectations

Firm A

Firm B

Questions still unanswered / my overall comfort

Firm A

Firm B

Verify attorney status independently. Ask for clarification before committing.

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LEAVE WITH A CLEAR NEXT STEP

Bring this page to your consultation and fill it in before you leave.

06 / MY FOLLOW-UP PLAN

Next action / who is responsible / agreed follow-up date

Dates the attorney confirmed and where each date came from

Documents or information requested next

Questions I still need answered before hiring

READY TO HEAR FROM ATTORNEYS?

Visit PickYourPro.ai, create an account, and start a new request. Describe the help you need. Let participating attorneys compete for your business with proposals you can compare. Review their experience, representation scope, fees, and availability.

One request. Every pro's best offer.

Start a request

Availability varies. Consultation may be needed before a final scope or fee.
A request does not create an attorney-client relationship.

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

Official California Courts: https://selfhelp.courts.ca.gov/divorce-california

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