



Tips for Calling Your Law Firm

When you call your law firm, they will normally ask you for 3 things:

1. Your 11 digit LegalShieldSM membership number
2. The brief Nature of your issue (“I would like legal advice on...”)**
3. Names/Contact information of any opposing parties

You will then be given an “Intake” or “File Number” to write down.
An attorney will call you back **within** 4 business hours so be ready!

**** Always make it clear you are calling to request an Initial Consultation**
(Even if you already think you know what you want to do)

Example:

“I’d like **advice** from an attorney to find out my **rights and options**

regarding: ” (my last will, a contract to sign, something I purchased online, a traffic ticket, a rebate or warranty, bankruptcy, separation or divorce, child custody, adoption, etc.)

3 Tips to Maximize Your Consultations

1. **Write your questions down** before the attorney calls you back and have pen and paper ready to **take notes** during the consultation.
2. Near the end of the consultation, always ask:
“Is there anything else you think I should be aware of?”
3. Request to **approve a draft** any time a letter is being sent out.

Conversation with Your Attorney Call Sheet

Your Law Firm Phone Number: _____

Your LS Member Number: _____

Date & Time of Your Call: _____ Assigned File # _____

Your Attorney's Name _____

I NEED ADVICE ON – You will be asked to briefly share the topic you are calling about:

Any other parties involved (individuals or companies): _____

Questions you want to ask the attorney:

Your Call Notes:

Actions to Complete: Email, Fax, Mail or Upload document(s) to: (remember to include your File Number)
