

Client Counseling Checklist

1. Introductions
2. Explain confidentiality
- 3. Get story**
- 4. Ask clarification questions**
- 5. Repeat story back to client to make sure you understand**
6. Give preliminary analysis, if possible
7. Describe next steps
8. Get client to repeat to ensure s/he understands, especially if next steps are complex
9. Discuss logistics of hiring you as attorney
10. Give client an assignment – e.g., collect documents.

Bold: This is where great listening skills are critical.