|  |
| --- |
| **Retention Notes | Client Consultation** |
| **1** | Consultation Date | October 7, 2022 |
| **2** | Client “Short Name” | {{ text\_client\_id }} |
| **3** | Consulting Attorney | {{ text\_who\_met }} |
| **4** | Retainer Amount | {{ text\_retainer }} |
| **5** | Attorneys’ Fees Estimate | radio\_estimate != "Other" {{ radio\_estimate }}### radio\_estimate == "Other" {{ text\_other }}### |
| **6** | Likelihood of Retention | {{ num\_percent\_hire\_firm }}% |
| **7** | Fee Agreement Transmission | {{ radio\_transmit\_agreement }} |
| **8** | Follow-Up | yn\_follow\_up == "Yes" and radio\_when\_follow\_up != "Input Exact Date" {{ radio\_when\_follow\_up }}###yn\_follow\_up == "Yes" and radio\_when\_follow\_up == "Input Exact Date" {{ text\_date\_to\_follow\_up }}### yn\_follow\_up != "Yes" N/A### |
| **9** | Conflict Waiver  | yn\_conflict\_waiver == "Yes" Yes###yn\_conflict\_waiver != "Yes" No### |
| **10** | Conflict Check | {{ text\_conflict\_check }} |
| **11** | Miscellaneous Notes | {{ text\_misc\_notes }} |