|  |  |  |
| --- | --- | --- |
| **Retention Notes | PC Consultation** | | |
|  | Name | {{ text\_client\_id }} |
|  | Phone No. | {{ text\_pc\_phone }} |
|  | Mailing Address | {{ text\_pc\_address|street }}  {{ text\_pc\_address|city\_state\_zip }} |
|  | Address of Property at Issue (if applicable) | yn\_other\_property == "Yes" {{ text\_address\_other\_property|street }}  {{ text\_address\_other\_property|city\_state\_zip }} ### |
|  | Email Address | {{ text\_pc\_email\_1 }}  yn\_other\_email == "Yes" {{ text\_pc\_email\_2 }} ### |
|  | Trust Info (if applicable) | \*\*\* |
|  | Consult Fee | $350 |
|  | If PC is a Referral, Identify Referring Source | \*\* \*\*\* \*\* |
|  | Consult Canceled/Rescheduled—Admin Notes re Same | \*\*\* |
|  | Consultation Date | {{ text\_consult\_date }} |
|  | Consulting Attorney | {{ text\_who\_met }} |
|  | Retainer Amount | \*\*\* |
|  | Fee Agreement Transmission | \*\*\* |
|  | Date to Follow-Up | \*\*\* |
|  | HOA/Neighbor Names  (and any other applicable parties) | {{ text\_conflict\_check|list\_to\_string }} |
|  | Is Conflict Waiver Necessary? | \*\*\* |
|  | Taking Over for Another Attorney? Who? | \*\*\* |
|  | Atty Consultation Notes | The fact pattern from PC’s calendar entry is as follows [*please use paste-special so that you do NOT carry formatting over from the calendar*]:  \*\*\*\*\*  — Initial Questions:  • How many homes in HOA? *\*\**  • What type of home does PC have (i.e., condo, single-family, townhome) *\*\**  • How many board members? *\*\**  • Is PC currently on the board? *\*\**  • Has PC ever been on the board? *\*\**  → If “yes,” when? *\*\**  — \*\*\*  — \*\*\*  — \*\*\*  — WHAT ARE THE PC’S PRIMARY GOALS [*this is where you will put the top 3-5 things the PC is interested in obtaining from whatever they want the Firm to do for them*]?  • \*\*  • \*\*  • \*\*  — ATTORNEY’S THOUGHTS/COMMENTS [*this is where you should note any gaps in information you think you need, impressions you had about the law that came to you as you were talking, or any other important things you told the PC related to their facts/law, etc.*]:  • \*\*  • \*\*  • \*\*  • \*\* |