

Attachment to Limited Scope Fee Agreement Tasks to be Apportioned

Use this form to allocate tasks between attorney and client. Attach this form to your revised fee agreement if the scope of representation changes.

Task	Attorney to Do	Date Completed	Client to Do
Analyze case and advise of legal rights			
Procedural Advice			
Formulating strategy and tactics			
Investigate Facts; Which issues?			
Obtain documents; Which ones?			
Draft Correspondence			
Review correspondence			
Review pleadings			
Appear in Court			
Prepare subpoenas for documents			
Take depositions			
Review depositions and documents obtained from others			
Legal Research and Analysis			

Attorney Initials: _____

Client Initials: _____

Task	Attorney to Do	Date Completed	Client to Do
Contact Witnesses			
Prepare Witness Statements/Declarations			
Draft or analyze settlement proposals			
Contact Expert witnesses			
Draft orders			
Outline Testimony			
Trial preparation			
Review documents that client drafts			
Draft other papers as necessary			
Other:			
Other:			
Other:			
Dated:		Dated:	
Attorney Signature		Client Signature	