ARASH LAW

REFERRAL CHECKLIST

What Should I Confirm Before Signing?

Use this checklist to review the proposed arrangement and identify key information that should be confirmed in writing before entering into an agreement.

- [ ] **Names of Attorneys & Firms:** Confirm all attorneys and firms involved, including explicitly who will have primary handling responsibility for the case.
- [ ] **Scope of Legal Work:** Detail the specific legal work each attorney has agreed to perform, including who will investigate your claim, negotiate with insurers, handle court filings, and communicate settlement offers.
- [ ] **Documentation Copies:** Receive and review copies of all proposed agreements, fee amendments, authorizations, and applicable court forms.
- [ ] **Written Consent Provisions:** Clarify your overall agreement and specify which major decisions will strictly require your formal written consent.
- [ ] **Fees & Cost Allocation:** Confirm the total attorney's fee percentage, any division of fees between participating firms, and legal responsibility for advanced case costs.
- [ ] **File Transfer & Privacy:** Identify which firm will send and store the case file, what documents will be transferred, and how your confidential information will be protected.
- [ ] **Communication & Updates:** Confirm the primary person responsible for regular updates, the preferred contact method, and the timeline for expected next communications.