|  |  |  |
| --- | --- | --- |
| **Retention Notes | PC Consultation** | | |
|  | Name | Steven Strange |
|  | Phone No. | (949) 555-1212 |
|  | Mailing Address | 4286 Country Club Dr.  Long Beach, CA 90807 |
|  | Address of Property at Issue (if applicable) | 123 Pacific Ave., #15  Long Beach, CA 90808 |
|  | Email Address | strange@magic.com  mrsstrange@mazgic.com |
|  | Trust Info (if applicable) | \*\*\* |
|  | Consult Fee | $350 |
|  | If PC is a Referral, Identify Referring Source | \*\* \*\*\* \*\* |
|  | Consult Canceled/Rescheduled—Admin Notes re Same | \*\*\* |
|  | Consultation Date | 10/23/22 |
|  | Consulting Attorney | MBK |
|  | Retainer Amount | \*\*\* |
|  | Fee Agreement Transmission | \*\*\* |
|  | Date to Follow-Up | \*\*\* |
|  | HOA/Neighbor Names  (and any other applicable parties) | Peter Parker, Pepper Potts, Country Club HOA |
|  | 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*]:  Habitasse platea dictumst vestibulum rhoncus est. Quis risus sed vulputate odio ut. Iaculis urna id volutpat lacus laoreet non curabitur gravida arcu. Ut lectus arcu bibendum at varius vel. Egestas egestas fringilla phasellus faucibus scelerisque eleifend donec pretium. In ante metus dictum at tempor commodo ullamcorper a. Eget duis at tellus at urna condimentum mattis pellentesque. In iaculis nunc sed augue lacus viverra vitae. Turpis egestas maecenas pharetra convallis posuere morbi leo urna. Penatibus et magnis dis parturient montes. Et netus et malesuada fames ac turpis egestas maecenas.  — 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.*]:  • \*\*  • \*\*  • \*\*  • \*\* |