

## Prepare to Meet with a Private Attorney

1. **Explain Your Situation:** When you first call the attorney's office, you will probably talk to a receptionist or paralegal who will ask about your needs before scheduling a meeting with the lawyer. If you have an emergency legal need, such as losing your housing, or if you received court papers or official legal notices, be sure to tell the intake person right away.
2. **Know What to Expect:** Ask what papers or information you should bring with you to your first visit. If needed, you can ask if the lawyer makes home visits or if they speak your preferred language. Be sure to ask how and when fees are usually charged for your kind of legal needs. Lawyers typically do not charge for the first visit, and after that will charge either an hourly fee or flat rate, depending on your needs. It is difficult to predict how much your legal needs will cost, but don't be afraid to ask questions until you understand and get the fees in writing.
3. **Gather Your Papers and Information:** Your attorney will need to know as much about your situation as possible to best help you. Documents they might request include financial information; such as insurance or benefits forms (i.e., Social Security, VA Benefits, Medicare/Medicaid), any official papers you recently received, information about your family, and any legal documents you might have (i.e., Will, Trust, Advance Directive, DPOA). Write down anything else you think is important and bring these notes with you to help you remember to share them with the attorney.
4. **Meet Alone with the Lawyer:** When you first meet with the lawyer, they will probably ask to meet with you alone and for any family or friends to wait outside. This is normal. Lawyers have a legal and ethical duty to focus on your needs and concerns, not those of others, and to keep your information confidential. Another reason to meet alone is to protect family members or friends from claims that they may have forced you to see the lawyer and do things you didn't really want to do. You can choose to give the lawyer permission to include others in the meeting, but you don't have to, and there are often good reasons to meet alone at first. You can always change your mind later.
5. **Help Your Lawyer Help You:** The lawyer will ask you to tell them about why you are seeking their help and will ask a lot of questions that may feel personal. This is because the more the lawyer knows about your situation; the better they can serve you. Your lawyer is required to keep everything you say confidential and cannot give your information to anyone else unless you give them permission to do so.
6. **Ask Questions:** Much of what lawyers do is listen and give information and advice. In fact most lawyers spend more time doing this than going to court, despite what most people see on TV. Think of your lawyer as someone who understands your situation and can help you learn about your options. If you don't understand something, don't be afraid keep asking questions. It is the attorney's job to explain things and help you decide what is best.
7. **Follow Up:** After your appointment, your lawyer will send you a letter explaining next steps and what to expect. Keep anything your lawyer sends in a safe place. Make sure to tell your lawyer right away if



your situation changes or you learn new information that you think is important for the lawyer to know in order to help you.