

Checklist for First Client Meeting

Client may have limited experience working with a lawyer. They may have had disempowering or confusing interactions with the criminal or immigration legal system or with other lawyers. Factors such as limited educational background and the effects of trauma can greatly influence how a client processes, recalls, and expresses information. Spend time to develop rapport and get to know your client.

Introductions/Get to know you

Introduce yourself, the interpreter, and anybody else present. Make some small talk and get to know a bit about the client. Share some personal information about yourself. Building trust takes time, and you have few personal meetings to build rapport and trust with your client.

Explain your role as the client's attorney

Explain that you will be the client's attorney for their motion to vacate. You can explain that you work for a law firm, are offering your services pro bono (for free), and will be supervised by experts in this area of law.

Explain what you will be helping them with and how it will work.

- Together you will prepare and file a motion in the court where they were convicted to ask the court to reverse or change their conviction to an immigration-safe offense.
- You will be their primary point of contact. OneJustice's role was to connect you and the client and to support you, but *you will be their lawyer*.
- You will stay in touch through the process, keep them updated on their case, and always discuss their case honestly and candidly. Explain that you expect the same from them in order for you to do the best job possible on the case.
- Your role is to identify options and help the client pursue the option of their choice. They get to make the decisions in their legal case.

Confidentiality

Explain confidentiality and that it applies even before the retainer is signed. You will discuss this more when you walk through the retainer.

Client retainer/engagement letter

Explain and summarize key points of the letter that have not already been discussed.

- Scope of services
- Client responsibilities
- Confidentiality
- No cost to client for services
- Permission to share information
- Termination – explain to client that they can end representation at any time & when you can

Process (generally)

You can share some steps from the case timeline to let the client know what they can expect and what parts of the case they will be helping with (equities, declaration).

Ask basic “intake” questions –

You can let the client know that, although you have their file from OneJustice, you would like him to tell you about the conviction on their record – what they remember from the process: did they have an attorney, did anyone talk to them about immigration consequences? You don’t need to get into details today, but you want to start to get an overview of the case. Explain to the client that you will go into this information further when you draft the declaration.

Confirm client’s contact information

Verify the client’s contact information. Verify the best times to reach the client and best method of contact. Where does the client live? Get an alternative mode of contact.

Provide client with your contact information

Provide the client your work phone number. Let them know the best way to communicate with you.

Set up next meeting

Establish what days of the week and times of day are convenient for the client and schedule the next meeting. This will likely be the meeting where you work on the client’s declaration. Let them know what types of questions you will be asking. Provide the meeting information in writing.

Assign the client homework

Describe the equities packet and types of information that are helpful to include. Have the client begin to gather that information and bring what they can to the next meeting. The client can also begin to gather any information that may be helpful in drafting their declaration.