
SAMPLE CHANGE IN SCOPE LETTER

Re: Limited Scope Representation

Dear _____:

Per our [telephone] conversation of _____, 20__, you have asked me to perform additional tasks that are not included in our original Agreement for Limited Scope Representation dated _____ [and modified _____] (copies enclosed).

You have requested and I have agreed to do the following:

1. [Enumerate the specific tasks/issues that you have agreed to undertake for the client.]
2. [e.g. to prepare _____ in response to the motion recently filed.]

I understand that you wish to continue handling all other matters yourself as set forth in our original Agreement.

It is essential that we both have the same understanding of our respective responsibilities in connection with your case. I have prepared and enclosed two copies of a new Checklist, which I believe covers the changes to the prior Agreement for Limited Scope Representation. I am unable to begin work on the new task[s] until one copy of the signed Revised Checklist has been returned to me. Please review the Checklist carefully and, if you agree, initial/sign BOTH copies and return one to me. The other copy is for you and should be attached to your copy of Agreement for Limited Scope Representation.

[If applicable] Some of the tasks you want me to undertake have significant time constraints that could seriously impact your legal rights. It is therefore extremely important that you complete and initial this new Tasks/Issues Checklist to memorialize the new scope of my involvement in your case. Because time is of the essence in taking the necessary steps to protect your rights in this new area, you should consider either coming to my office to sign the Checklist or securely transmitting a signed copy (through the client portal) so I can start work.

I encourage you to seek the advice of other counsel in connection with tasks that I have not undertaken. Also, please feel free to consult with another attorney of your choice regarding this Revised Checklist before initialing/signing and returning it to me.

I look forward to working with you on this new matter.

Very truly yours,

Enclosures: Two copies of Revised Tasks/Issues Checklist

SAMPLE REVISED TASKS/ISSUES CHECKLIST

FOLLOW-UP CHECKLIST	
Client:	
Attorney and Client consulted on _____	(fill in date)
By _____	(fill in date) Client will:
Obtain the following documents:	
Contact the following witnesses:	
Complete the following forms:	
Prepare the following information for coaching:	
By _____	(fill in date) Attorney will:
Draft the following documents:	
Prepare the following forms:	
Contact the following witnesses:	
Research the law/procedure on:	
Review the following documents:	
Other:	
Attorney initials/signature: _____	Client initials/signature: _____