

**PRIVILEGED & CONFIDENTIAL  
ATTORNEY COMMUNICATION**

Name: \_\_\_\_\_  
*(first and last)*

Location of work at issue: \_\_\_\_\_  
*(city, state; if multiple, most recent)*

Name of Federal Agency at issue: \_\_\_\_\_

Position Title & Grade: \_\_\_\_\_

**Specific Concerns to Address**

Please tell me if there are any specific concerns you would like to have addressed during our meeting. *(e.g., discussion of settlement value, discovery preparation, upcoming hearing)*

**Current Cases**

List the current cases you have open at the EEOC, MSPB, union arbitration, OSC, or other:  
*(If you do not yet have a case filed, leave this part blank)*

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**Upcoming Deadlines**

Please tell me the next upcoming deadlines in any of your cases *(e.g., hearings before a judge, right to file a formal complaint, discovery deadline, summary judgment)*

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**Primary Goals of Litigation**

Please identify the top two goals that you have in pursuing your claims (*e.g., return to work, get a reasonable accommodation, transfer to new supervisor, cash settlement*)

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**Damages**

- I have lost income due to the Agency actions that I faced. Estimated: \$\_\_\_\_\_
- I have suffered emotionally from the Agency actions that I faced.

Provide a brief description of what has occurred emotionally (*e.g., loss of sleep, anxiety at work, PTSD*).

Has any loss of income affected your ability to make payments resulting in financial losses to you (*e.g., mortgage payments, car payments, medical expense payments*).

**Budget**

Employment cases can be costly. It is important for us to discuss what options you have at a budget that is reasonable for you. It is no help to get halfway through a case and be unable to pursue it because a budget has been exceeded.

- I have an estimated budget that is: \_\_\_\_\_ **OR**  I don't have an estimated budget yet.

## GUIDELINES

We are planning on discussing your legal claims against a federal employer. Here are some helpful guidelines for us to work with during the meeting. I am providing this to you now so that you understand in advance of our meeting what to expect.

- This is a meeting to provide you with feedback, strategy, and understanding of your case. It is not an opportunity for me to sell you on my services. I would never ask someone to pay for a sales pitch.
- We will spend the first 60 minutes or so discussing the facts of your case, including what happened to you, what claims you have filed, and what evidence you have to support the claims, as well as what steps are available to obtain further evidence.
- 60 minutes sounds like a long time, but it isn't. We're trying to fit months or years of your daily lived experience into a very short amount of time. In order to get as far as we can in our brief time together, I ask that you answer as succinctly as possible the questions that I ask so that I can diagnose the issues in your case as quickly as possible and I can provide you with a strategy discussion that best takes into account the reality of your case.
- The last 30 minutes or so we will discuss your goals and strategy for achieving those goals. I will work with you to develop alternative goals, such as non-monetary relief, to ensure that you have a fuller picture of your options.
- I will discuss with you the strengths and weaknesses of your claims, including whether there is supporting evidence, what evidence can be obtained through other means such as 'discovery,' and whether your evidence, given the legal standards applicable to your case, would likely result in achieving the goals you have.
- Understand that the vast majority of employment cases are either dismissed or settled for very little. Lack of evidence is the most common reason for dismissals in my experience. My job is to provide you with honest feedback about the evidence to support your case, how to get it, and likely outcomes.
- At the end of our meeting, I may discuss with you a continuing representation. However, I will make the decision about whether a representation makes sense based on a variety of factors including the strength or weakness of your claims, your goals, and our ability to work well together. There is no obligation on your or my part to form an ongoing representation. Any representation will require agreement to terms and conditions and may require payment of a deposit.

I have reviewed and understand these guidelines.