

When, Why & How of Client Engagement & Conclusion of Representation Letters

What you need to know about signing up and signing off

Having a solid handle on client engagement—and disengagement at the conclusion of representation—makes a critical foundation for your mutual understanding with clients.

Client engagement letters not only launch the attorney-client relationship’s logistical terms by setting fees and establishing the scope of representation and attorney of record—they also establish the tone of the relationship. Before agreeing to represent a client, you want to make sure that you’re both on the same page and that you can competently carry out representation.

If you haven’t looked at your engagement letters or fee agreements lately, there are certain elements which are required, including determining the type of billing agreement (such as hourly fee, flat fee, contingency fee), the basis of rate of the fee and expenses for which the client will be responsible, or the contingency upon which compensation will be paid, a defined scope of engagement, handling of retainers and trust accounts, and fee-splitting, if relevant.

In addition, there are several clauses that can be helpful down the line. For example, it is now commonplace to have clauses within engagement letters discussing file retention and method, data security, file destruction, options to engage a back-up attorney to examine the file if needed, termination, withdrawal, and dispute resolution.

Join us as we explore the beginning and ending of representation—from client engagement to conclusion of representation—as well as setting client expectations and establishing methods for client communications.

Agenda

- Purposes of Engagement Agreement and Disengagement and NonEngagement Letters
- When a Written Fee Agreement Is Required
- Types of Fee Agreements
- Mechanics of Drafting Fee Agreements
- Sample Clauses
- How Client Engagement Fits into Intake
- “Ask the Experts” Q&A Session

Faculty

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Dates & Location

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LIVE WEBCAST

Wednesday, February 26, 2025
12:00 pm–1:00 pm
Program # 2250087WBC

REBROADCAST

Thursday, March 13, 2025
2:00 pm–3:00 pm
Program # 2250087RB1

REBROADCAST

Friday, March 21, 2025
10:00 am–11:00 am
Program # 2250087RB2

ON DEMAND WEBCAST

View after Friday, March 21, 2025
Program # 2250087WBA

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