

THE PRACTICAL LAWYER

PUBLISHED BY THE AMERICAN LAW INSTITUTE-AMERICAN BAR ASSOCIATION
COMMITTEE ON CONTINUING PROFESSIONAL EDUCATION EIGHT TIMES A YEAR

VOLUME 29

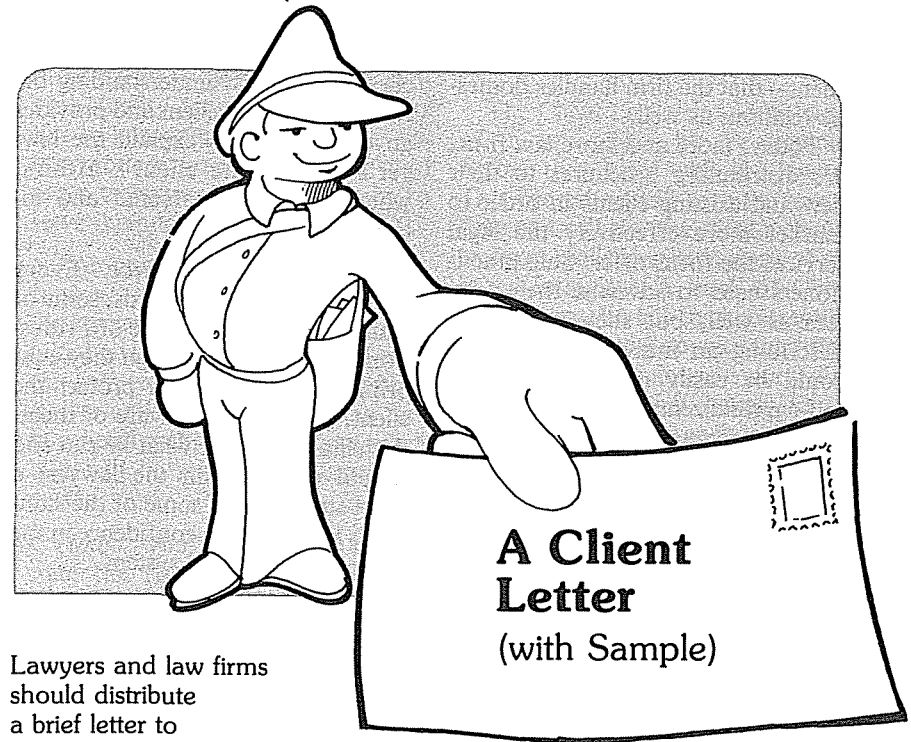
JULY 15, 1983

NUMBER 5

available



A Client Letter (with Sample)



Lawyers and law firms should distribute a brief letter to new and old clients containing basic information about the law practice, the background of the staff, and other pertinent matters.

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A **LAWYER IS ALWAYS SURPRISED** when a long-time client does not know that the firm's expertise extends to fields that the client has never used. For example, a business client may be unaware that the firm

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also prepares wills and handles real estate closings, or a personal injury client—that the firm handles domestic relations as well.

Today, more and more law firms are distributing brochures to their new and existing clients in order to market more effectively the legal services the firms offer. Sole practitioners need to advertise their services as well, but slick pamphlets describing an individual's practice could be easily misunderstood as self-aggrandizement rather than effective communication. The answer for the individual lawyer is to use a Client Letter.

The Client Letter should be typed on the lawyer's letterhead and should not be more than two pages long. It should read easily and seem informal. The contents should inform the client of what he wants to know as well as what the lawyer wishes to convey. The Client Letter should cover the following subjects:

- *Legal services.* List the legal services the lawyer provides. The descriptions should be broad enough to include most of what the lawyer does, yet specific enough to jog the client's memory if he ever has the need for a particular service.

- *Statement of philosophy.* Peter Drucker has said, "A clear, simple, and penetrating theory of the business, rather than intuition, characterizes the truly successful entrepreneur. . . ." P. Drucker, *Management*

74 (Harper & Row, New York City, 1974). Conveying this theory to the client helps build understanding between lawyer and client and provides an opportunity to explain the lawyer's role in the client's affairs, which are often personal and intimate.

- *Standards of practice.* Every lawyer maintains standards, some of which appear in the Code of Professional Conduct. Although they exist primarily to assist and protect the client, he is often unaware of them. By telling the client what he can and should expect from the lawyer, a short statement of some of the standards will promote confidence in the lawyer and the legal system.

- *The lawyer's background.* Although the lawyer questions the new client in detail about the client's background, employment, and personal details, the client usually has little information about the lawyer to whom he entrusts his very important matter. The Client Letter should provide the client with accurate and relevant information about the lawyer's education, experience, professional membership, and community involvement.

- *Background of staff.* The Client Letter should introduce the lawyer's staff, with whom the client may deal more often than the lawyer.

- *Equipment and resources.* Lawyers spend a lot of money on law

books and office equipment. The Client Letter should explain how these resources help the lawyer provide quality legal services. Clients like to know that their lawyer is using modern word processing and other techniques and equipment to serve them better.

- *Fees and costs.* The Code of Professional Responsibility states that the lawyer should discuss fees in the initial conference. The Client Letter can help to "break the ice" for both lawyer and client by explaining fees in general and such matters as when bills will be sent and payment expected.

- *Hours.* The Client Letter should state the firm's office hours and

other information the client needs about the office's availability.

The Client Letter should be handed to new clients by the secretary before they meet with the lawyer. This procedure will save the lawyer time and will give the client a chance to form realistic expectations of the initial interview. A stack of Client Letters may be left in the reception area, as law firms do with their firm brochures. The lawyer may also want to send Client Letters to existing clients, to inform them of facts they do not already know and to remind them of those they do. The Client Letter should be updated from time to time. For a sample Client Letter, see Form 1.

FORM 1 — A CLIENT LETTER

Dear Client:

The purpose of this letter is to acquaint you with our law office.

Legal Services. We provide to businesses, individuals, and not-for-profit organizations a full range of legal representation, including services for the following purposes:

- The formation and maintenance of corporations and partnerships;
- The preparation and review of contracts for the sale and financing of all kinds of goods, services, and buildings;
- The registration and licensing of copyrights and trademarks and related litigation;
- The preparation and review of contracts and closing documents for selling businesses;

- Advice and representation in legal matters involving computers and related systems;
- Advice and representation in real estate construction, sales, exchanges, leases, loans, title insurance, and zoning matters and proceedings;
- The preparation of wills, trusts, and powers of attorney;
- Probate and guardianship proceedings and litigation;
- State and federal tax matters and proceedings;
- Lawsuits and administrative proceedings.

Philosophy. Clients are best served by the prevention of legal problems through careful and thorough advice given prior to their entering into transactions and business arrangements. When a legal problem does arise, clients will be assisted in finding the most practical and cost-effective solution, which may or may not include litigation.

Standards of Practice. All work is done quickly and skillfully. If we are not skilled in a particular area, we will either refer it to a lawyer who is, or associate counsel. In any case, the goal is to see that clients receive the highest quality legal services.

Clients are kept informed at all times by copies of the correspondence, documents, and pleadings that we produce, send, or receive on their behalf. Although there is some expense for photocopies and postage, clients stay informed.

Telephone calls are answered as promptly as possible. If a client's question does not involve legal advice, the legal assistant can often answer it more quickly than the lawyer.

Information given by clients is held in strict confidence.

Background of [Lawyer]

- Georgia Tech — received Bachelor of Science in mathematics, majoring in electrical engineering, and worked in computers.
- Stetson College of Law — received Juris Doctor in 1974.
- Continuing legal education — attends many state and national seminars on business, tax, real estate, estate planning, and similar topics.

- Author of the Corporation System Manual for Lawyers — a computerized system for corporation formation.
- Author of "How To Protect the Plaintiff in a Structured Settlement," *Trial* magazine.
- Taught corporation law at St. Petersburg Junior College.
- Active in Florida Bar committees and sections.
- Is licensed to act as a Florida real estate salesman.
- Member of Board of Trustees of the Salvador Dali Museum.

Background of [Legal Assistant]

- Graduated from St. Petersburg Junior College in 1974.
- Worked with Mr. Martin since 1976.
- Served as an officer of the St. Petersburg Legal Secretaries Association.
- Operates the word processor and prepares legal documents.

Modern Word Processing. Our IBM Displaywriter word processor is a powerful computer that allows the typing and storage of legal documents on magnetic diskettes and the revision of documents without the need to retype the entire document. It prints documents at speeds of over 500 words a minute. The Displaywriter saves lawyer and staff time so that they can provide you with the highest quality work in a very timely manner.

Fees and Costs. We strive to provide quality services for a fee. The fees are based on the amount of time spent, the complexity and skill required, and similar factors. Clients are responsible for reimbursing costs, including postage, long distance telephone calls, photocopies, filing fees, and so forth.

Fees are discussed in the initial conference. The office requires a fee retainer and a deposit for costs before beginning work. Fees and costs billed are listed on itemized statements that are sent at regular intervals, usually monthly. Payment of fees and costs is due upon the receipt of the bill. If another payment method is necessary, please discuss this at the initial conference.

Hours. Office hours are from 8:30 a.m. to 5:00 p.m., Monday through Friday. The office is closed for lunch from noon to 1:00 p.m. A telephone answering machine records messages when the office is closed.