

*Note: The following is an example of a template to use during your first meeting with a new client. You may want to consider a layout like the one in this template, but with topics and questions broken down into smaller pieces. Leave space to add questions specific to each new case based on your review of the filings.*

## **Initial-Client-Meeting Checklist**

### **Information to share with the client**

- Explain role as attorney.
- Provide overview of abuse, neglect, and dependency court, including possible consequences.
- Review the roles of each party, including DSS and the guardian ad litem.
- Inform client of the right to contest the petition and the right to be present and heard.
- Remind client of when and where court is.
- Review client's need to make transportation and childcare arrangements for court.
- Discuss possible accommodations the client needs, including a courtroom interpreter or assistance with reading.

### **General questions and topics for the client**

- Ask client to tell you about themselves.
- What does the client enjoy doing? Where does the client enjoy spending time?
- Where does the client live? Who does the client live with?
- Does the client work? Does the client receive disability assistance? How does the client support themselves and their family?
- Does the client have a doctor? Does the client have a therapist? Who are other service providers the client has interacted with?
- What is the client's medical history? Mental-health history? Substance-use history? Who did the client grow up with? What type of upbringing did the client have?
- What is the client's current relationship with relatives?
- What has been the client's experience as a parent? Ask the client about the client's child(ren), both named and unnamed in the petition(s).
- Does the client have a relationship with their child(ren)? Ask the client to describe the client's child(ren). What are they like? What are their needs? How do they typically spend time together? What have been the biggest challenges to parenting? What is the best part of being a parent?
- If the client could change something about themselves or their situation, what would it be?
- Find out about any previous DSS involvement or court history the client has.
- Ask the client about friends, family members, or others who could vouch for the client. Discuss social media, text messaging, and other possible traps for the client.

Use this section to write additional questions that come up during the meeting or to take notes.

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