

Elder Law Attorney Checklist

Use this checklist to evaluate an elder law attorney (simply print out one checklist per attorney you plan to review). The checklist is designed to help you know what to ask and to remember specific details. Use the back of the checklist to write down any additional comments. After interviewing each attorney, use the checklists to compare him or her with other attorneys.

Attorney's Name: _____

Law Firm: _____

Address: _____

Phone: _____ **Website or E-Mail :** _____

Who is Served?

Yes **No**

 Does the attorney's practice emphasize elder law?
If yes, what percentage of the practice is devoted to elder law? _____

Which types of elder law (for example, preservation/transfer of assets, Medicaid, disability planning, conservatorships and guardianships) does he/she practice? _____

 Does the attorney handle cases like yours regularly?
If yes, how often? _____

Services

 Is the attorney willing to meet with you, before you retain him/her, in order to get acquainted?

 Will the attorney personally work on your case, or will he/she delegate it to an associate or paralegal assistant?

 If a court appearance is involved, does he/she do the courtroom work?
If not, who will do the courtroom work? _____

 Did the attorney explain a clear course of action to address your needs?

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Yes No

Did he/she discuss with you the advantages and disadvantages of alternative courses of action?

Will he/she be available by phone if you have questions?

Credentials

Is the attorney a member of the National Academy of Elder Law Attorneys (NAELA)?

Is he/she an active member of the local bar association?

If yes, does he/she serve on its health advocacy committee, or its trust and estates committee?

Does he/she do pro bono work?

If yes, for whom? _____

Can he/she provide references?

How many years has the attorney been in practice? _____

Cost

Is there a fee for the initial consultation?

If yes, how much? _____

Are all costs and fees listed on a written statement?

Are the bills itemized?

What services are provided for by a flat fee? _____

What are the hourly rates? _____

What out-of-pocket expenses will you be charged for? _____

Are services billed weekly, monthly or on completion of service? _____

Does the attorney require a retainer for his/her services?

If yes, will this fee be refunded should the fees end up being less than the amount of the retainer?

What is his/her estimate of how long it will take to address your legal needs and how much this will cost you? (Get the estimate in writing.)

Overall Quality

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Evaluate the attorney in the following areas on a scale from one to ten, with ten being a perfect score:

- Do you feel comfortable with this attorney handling your legal needs? 1 2 3 4 5 6 7 8 9 10
- Can you communicate well with him or her? 1 2 3 4 5 6 7 8 9 10
- Did he or she answer your questions clearly and comprehensively? 1 2 3 4 5 6 7 8 9 10