Limited Scope Representation Flow Chart for Clients

Consult attorney, discuss issues and options for **limited scope** → Select **full service**

Select **limited scope**

- Decide what issues and tasks will be **divided between you and attorney**
- Decide who is going to do which parts

Sign written retainer agreement or engagement letter and consent to limited scope; keep copies of each

Attorney performs services **without appearing in court** on your behalf

Attorney **appears in court** on your behalf for a limited purpose

You both get service of all documents; decide who will talk to Opposing Counsel

You and attorney perform the tasks you each agreed to do

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Is the case finished?

Yes — No

Is the case finished?

No — Yes

You need **additional services** outside initial scope and/or new issues emerge

Attorney sends you **withdrawal letter** and you advise attorney immediately if you don't think all agreed services have been completed

Return to top and start over with new issues and division of tasks; revise or amend retainer agreement or engagement letter

Attorney prepares and files **Notice of Withdrawal from Limited Scope Appearance**

If you agree that work is done, **sign**; it is effective immediately

If you think work is not done, **do not sign**; you have 14 days to file an **Objection to Withdrawal from Limited Scope Appearance**

Adapted from *Civil Limited Scope Representation: Risk Management Material*s, Limited Representation Committee, California Commission on Access to Justice.