

# OPENING NEW FILES

**CLIENT:**

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**FILE NO.**

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1. Assign new file number \_\_\_\_\_
2. Contact information (include birth date) \_\_\_\_\_
3. Set up new file \_\_\_\_\_
  - Correspondence
  - Memos and Notes (2 brads)  
Initial consultation notes on left with  
Retainer Agreement on bottom
  - Client Documents
  - Costs and Disbursements (2 brads)  
Checks on left/bills, etc. on right
  - Pleadings
  - Discovery
  - Original Pleadings and Discovery
  - Child Support Calculations
  - Financial Updates
4. Set up TABS Information \_\_\_\_\_
5. Set up Conflicts check Information \_\_\_\_\_
6. Set up directory in Word \_\_\_\_\_
  - Ltr
  - Mem
  - Misc.
  - Pld
7. "TO DO LIST" Sticker \_\_\_\_\_
8. Enter retainer fee into TABS \_\_\_\_\_