|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| [Date] | | | | | | |
| To: | | [Client Name] | | | From: [Attorney Name] | |
| Re: | | [Matter] | | | | |
| **Upcoming Events to Put on Your Calendar** | | | | | | |
| Date | | [Event] | | | | |
|  | |  | | | | |
| **Pending Items** | | | | | | |
| We are waiting for | | | | | From | |
|  | | | | |  | |
|  | | | | |  | |
| **Comments** | | | | | | |
| **Account Status** | | | | | | |
| ⬜ | Your account is paid in full. Thank you! | | | | | |
| ⬜ | You have an outstanding balance: $[Amount] | | | | | |
| ⬜ | Your Trust Account balance is: $[Amount] | | | | | |
| ⬜ | Please contact [Name] about your account: [xxx]-xxx-xxxx | | | | | |
| **Your Legal Team** | | | | | | |
| Attorney: | | | [Name] | [Phone Number] | | [E-Mail Address] |
| Staff: | | | [Name] | [Phone Number] | | [E-Mail Address] |
| Bookkeeper: | | | [Name] | [Phone Number] | | [E-Mail Address] |
| **What We Need from You** | | | | | | |
| ⬜ | Please call [Name] at [Phone Number] to discuss [Description]. | | | | | |
| ⬜ | Please provide us with [Documents or Information Needed]. If you have questions, call [Name] at [Phone Number]. | | | | | |
| ⬜ | Please update your [E-Mail Address], [Phone Number], or [Alternate Mailing Address]. | | | | | |
| ⬜ | Your next court date is [Date] for [Reason for Court Date]. Please confirm your attendance with [Name] by phone [Phone Number] or e-mail [E-Mail Address]. | | | | | |
| ⬜ | Nothing is needed. | | | | | |

*Attorney Signature*

[Attorney Name]

**IMPORTANT NOTICES**

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