|  |
| --- |
| [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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