

Tool: Limited Scope Risk Management Materials (California Commission on Access to Justice 2004)



The [California Commission on Access to Justice](#) developed comprehensive risk management materials to help lawyers develop ethical unbundled or limited scope practices. The materials are designed to help lawyers document their fee and ensure that they and the client are in agreement on the limitations on the scope of your representation, which tasks the lawyer is going to perform and, more importantly, which ones the lawyer is NOT going to perform. The materials are designed as templates that should be tailored to the individual lawyer's needs. The Limited Representation Committee of the California Commission on Access to Justice has published [Family Law Limited Scope Risk Management Materials](#) and [Civil Limited](#)

[Scope Risk Management Materials.](#)

A brief overview of the materials and their intended use follows:

1. Limited Scope Representation Description (Client Handout)
2. Best Practices Tips
3. Flow Charts
4. Sample Intake Sheet
5. Sample Tasks to be Apportioned/Issues to be Apportioned Checklists
6. Sample Fee Agreements
7. Sample Change of Scope Letter
8. Sample Follow Up Checklist
9. Sample Tickler Checklist
10. California Judicial Council Forms
11. Other Handouts
12. Sample Closing Letter

Last updated on September 28, 2020.

Year published: 2004

Document Author:

- California Commission on Access to Justice

Topics

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Files

[Family Law Limited Scope Representation Risk Management Materials_California Commission on ATJ \(2004\).pdf](#)

[General Civil Limited Scope Representation Risk Management Materials_California Commission on ATJ \(2004\).pdf](#)

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