

Information & Instructions: Client satisfaction and acknowledgment closing a probate matter

PREVIEW

1. Use this form to obtain feedback from the client as to the nature and satisfaction of the services received from your law firm.
2. Ideally, the client should complete the questionnaire and sign the disclosure statement before the close of the matter or final hearing, if any.

Form: Client satisfaction and acknowledgment

[Date]

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ATTORNEY-CLIENT COMMUNICATION: THIS DOCUMENT AND ITS CONTENTS CONSTITUTE LEGALLY PRIVILEGED INFORMATION

[Client's name]
[Client's address]

Dear [Client's first name]

This letter is designed to make sure you are satisfied with the legal services that we have provided to you concerning the probate matter that we have handled for you.

Please complete the form that is attached to this letter and return it to our office.

If you have any questions concerning any other legal matter, please call me at [Attorney's phone number].

Very truly yours,

[Name of attorney]

CLIENT SATISFACTION QUESTIONNAIRE AND ACKNOWLEDGMENT FORM

THANK YOU
ATTORNEY-CLIENT COMMUNICATION: THIS DOCUMENT AND ITS CONTENTS CONSTITUTE LEGALLY PRIVILEGED INFORMATION

Date _____

Client's name _____

Attorney's name that handled your legal matter _____

Why did you choose this law firm to handle the probate matter?

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How were you referred to this office (a) for client, yellow page, newspaper etc.:

PREVIEW

Were you adequately informed about the probate rules, procedure and process including tax considerations?

Yes ___ or No ___ Please explain your answer

Were all of your questions answered?

Are you happy with our service?

How would you rate our service? High ___ Medium ___ or Low ___ Please explain your answer.

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Were the documents prepared as quickly as you expected? Yes ___ or No ___. Please explain your answer.

Would you recommend our services to others? Yes ___ or No ___. Please explain your answer.

What could we do to improve our services?

What other legal services could we provide to you?

THANK YOU FOR ALLOWING US TO SERVE YOU
THIS DOCUMENT
Individual Acknowledgment.

I have received and read this disclosure statement. I have received all documents, files and other property which is owned by myself or the ward from the law firm that has handled this matter.

I also acknowledge that no further attorney-client relationship exists between myself and the attorney who wrote this letter and that no further or continuing duties are owed to me by the attorney.

Signed on _____.

THANK YOU

[Client's Name]

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Form: Client receipt for return of the client's file

PREVIEW
RECEIPT FOR THE RETURN OF THE CLIENT'S FILE

This receipt is to acknowledge that I have picked up my file and all supporting documents pertaining to my legal matter. I understand that no further attorney-client exists between me and [Attorney's name].

Signed on _____.

[Client Name]
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THIS DOCUMENT

THANK YOU

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