

**Initial Client Meeting Guide**

You should call your client within two weeks of receiving the case to schedule the

first meeting. The first meeting should be completed within one month of receiving the case. You do not need to have a comprehensive understanding of the entire case to schedule the first meeting. In preparation for meeting, determine if an interpreter will be needed and if so, arrange for one. Provide client with directions to meeting place and reserve space if needed.

**Overview of meeting**

1. Introductions
2. Explain attorney role
3. Explain client role
4. Conflict resolution
5. Retainer agreement
6. Plan for representation
7. Answer questions

* **Introductions**
  + Who you are
  + How to contact you – preferred method (e-mail, phone) and how to leave a message
  + Why you are volunteering on an asylum case
  + Who the client is
  + Verify contact information (or contact person) & language for client
* **Attorney role**
  + Prepare written documents for submission (includes I-589 application for asylum, affidavit, legal memo or brief, table of contents);
  + Determine necessary evidence, witnesses, secondary evidence and prepare and submit evidence;
  + Prepare client for testimony before asylum office or judge;
  + Meet all deadlines for submissions;
  + Communicate with client in a timely manner
    - Case status updates
    - Responses to calls/letters
    - Letters summarizing advice/next steps;
  + Communication with agency/court;
  + Confidentiality and privilege;
  + Scope of role as attorney – what you don’t do, as well as what you do;
  + Timing of case – how long you estimate case will take;
  + Respond to client questions and explain legal process so client can understand and make decisions about his/her case.
* **Client role**
  + Tell story honestly and openly, respond to questions honestly;
  + Assist in contacting friends & family to get documents to support case or witnesses
    - Fraudulent documents can harm case – advise that any document should be real
    - Keep envelopes sent from abroad containing evidence
    - Important to make an effort to get documents;
  + Review asylum application, affidavit, letters, evidence and any other documents for accuracy before signing and tell you about any mistakes or errors;
  + Ask for an interpreter when needed;
  + Ask questions about your case and process when you don’t understand;
  + Know deadlines and hearing dates and support your attorney in meeting these;
  + Keep attorney updated on changes in phone number and address for contact;
  + Keep appointments – know where you are going, when you need to be there, and call if you will be late.
* **Conflict resolution**
  + Explain what the client should do if he/she has a problem with you;
  + Explain any grievance policy your office has (if applicable);
  + Call The Advocates if the problem cannot be resolved between the two of you;
  + Client decision to fire attorney, but no guarantee of new volunteer from The Advocates.
* **Review Retainer Agreement**
  + Scope of representation: only asylum and only at this particular stage of the proceeding;
  + Confidentiality:
    - What confidentiality is and how it applies
    - Releases required for other parties (including friends, social workers et cetera)
    - Own decision to share or not share information about case with others;
  + Ending representation:
    - Ethical guidelines for attorneys and why may not be able to continue on case
    - Conflicts
    - Criminal convictions
    - Lying
    - Loss of communication or cooperation;
  + File retention policy: how long will you keep file after case is closed;
  + Costs: attorney assumes costs of copying, mailing, filing documents, interpreter, attorney travel to and from interview/hearing. Client responsible for fees associated with work permit renewal, other applications (no fee for asylum, family petition or first work permit), photos, client travel to and from attorney meetings and immigration hearings/interviews;
  + Answer questions from client about agreement;
  + Get signature and place copy in your file; client keeps one copy.
* **Plan for representation**
  + Review deadline(s) in the case so both you and client know ultimate deadline (one year deadline, master calendar date, appeal deadline etc.);
  + Explain to client that a number of meetings will be needed to prepare, revise and sign final application – explain why (necessary to present a good, complete case);
  + Explain to client amount of time you estimate this may take and explain the estimate (based on your workload, schedule etc.);
  + Set up next meeting or made arrangements for scheduling next meeting;
  + Acknowledge, listen to and respond to client concerns about timing and representation.
* **Questions from client**
  + Make notes in file if these are extensive, raise particular issues, or indicate a potential problem.
  + At close, remind client to continue to contact you with questions or concerns about their case.