

Family Law Case Management Checklist Template

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Intake & Initial Assessment


Activities related to the initial client contact, information gathering, and assessment of needs.

Initial Contact Date

Enter date...

Reason for Seeking Legal Representation

Write something...

 Hi there, need help?



Client's Current Living Situation

- With Spouse
- With Family
- Renting
- Owning

Number of Children Involved

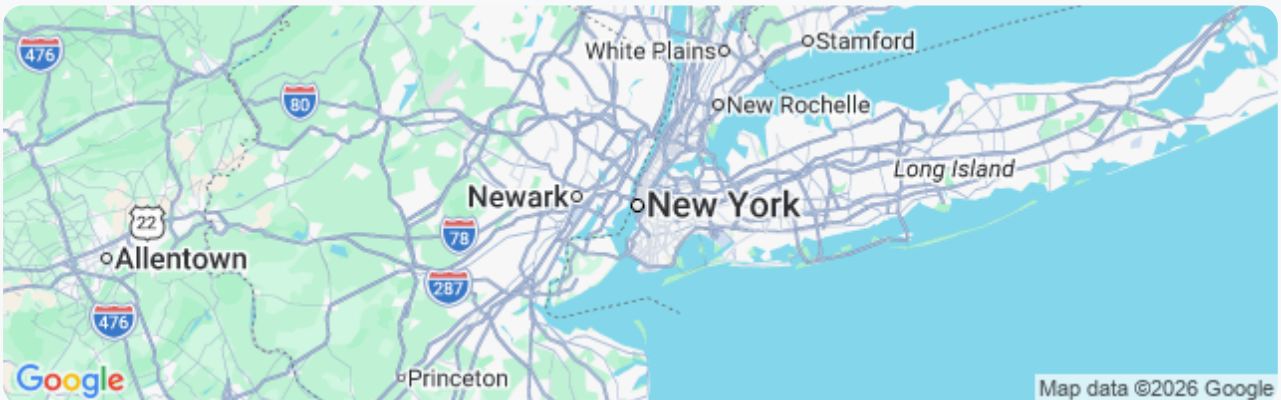
Enter a number...

Client's Primary Contact Information

Write something...

Client's Current Location (for service of process)

[📍 Set My Current Location](#)



Hi there, need help?

Client Information & Documentation

Ensuring complete and accurate client records are maintained throughout the case.

Client Full Name

Write something...

Client Background Summary

Write something...

Client Date of Birth (YYYY)

Enter a number...

Client Relationship to Case

- Plaintiff
- Defendant
- Witness
- Other

Supporting Documents (e.g., Birth Certificate, ID)

 Upload File

Hi there, need help?

Initial Consultation Date

Enter date...

Emergency Contact Information

Write something...

Client Address

Write something...

Legal Research & Strategy

Tasks related to legal research, developing case strategy, and identifying relevant precedents.

Case Theory/Legal Arguments

Write something...

Hi there, need help?

Applicable Statutes/Codes

- Family Code
- Probate Code
- Domestic Violence Act
- Other

Date of Key Legal Research

Enter date...

Summary of Relevant Case Law

Write something...

Potential Legal Challenges

- Lack of Evidence
- Jurisdictional Issues
- Procedural Errors
- None Anticipated

Number of Statutes Reviewed

Enter a number...

Hi there, need help?

Discovery & Evidence Management

Managing discovery requests, gathering evidence, and ensuring proper handling of exhibits.

Discovery Request Deadline

Discovery Method

- Written Interrogatories
- Requests for Production
- Depositions
- Subpoenas

Number of Documents Produced

Uploaded Documents

 Upload File

Hi there, need help?

Notes on Document Review

Write something...

Privilege Review Required?

Yes

No

Privilege Review Completion Date

Enter date...

Court Filings & Deadlines

Tracking court filing deadlines, preparing necessary documents, and submitting them to the court.

Initial Filing Deadline

Enter date...

Response Deadline to Petition

Enter date...

Hi there, need help?

Discovery Exchange Deadline

Enter date...

Motion Hearing Date

Enter date...

Trial Date

Enter date...

Type of Filing

- Petition
- Response
- Motion
- Order
- Other

Case Number

Enter a number...

Filed Documents

 Upload File

Hi there, need help?

Negotiations & Mediation

Activities related to negotiating settlements and participating in mediation.

Negotiation/Mediation Scheduled Date

Enter date...

Negotiation/Mediation Start Time

Enter time...

Negotiation/Mediation Location

In-Person

Virtual

Summary of Initial Negotiation Offers

Write something...

Hi there, need help?

Amount of Initial Settlement Offer (USD)

Enter a number...

Key Issues Discussed

- Child Custody
- Child Support
- Alimony
- Property Division
- Debt Allocation

Summary of Counter Offers and Responses

Write something...

Mediator Signature (if applicable)

Litigation & Trial Preparation

Tasks associated with preparing for trial, including witness preparation and exhibit organization.

Trial Date Scheduled

Enter date...

Hi there, need help?

Estimated Trial Start Time

Enter time...

Witness Preparation Notes

Write something...

Uploaded Exhibits (Organized)

 Upload File

Key Exhibits to Highlight

- Exhibit A
- Exhibit B
- Exhibit C
- Exhibit D

Opening Statement Outline

Write something...

Hi there, need help?

Potential Cross-Examination Questions

Write something...

Attorney Signature for Trial Prep

Financial Management & Support

Tracking financial matters related to the case, including child support, alimony, and property division.

Client's Income (Monthly)

Enter a number...

Spouse's Income (Monthly)

Enter a number...

Child Support Award Amount

Enter a number...

Hi there, need help?

Alimony/Spousal Support Award Amount

Enter a number...

First Payment Date (Child Support)

Enter date...

First Payment Date (Alimony/Spousal Support)

Enter date...

Payment Method

- Direct Deposit
- Check
- Wage Garnishment

Notes on Financial Disclosures

Write something...

Hi there, need help?

Communication & Reporting

Maintaining clear and consistent communication with the client, other parties, and relevant professionals.

Date of Communication

Enter date...

Method of Communication

- Phone
- Email
- Mail
- In-Person
- Video Conference

Summary of Communication Content

Write something...

Recipient of Communication

- Client
- Opposing Counsel
- Court
- Guardian ad Litem
- Expert Witness

Hi there, need help?

Recipient Name

Write something...

Supporting Documents (e.g., emails, letters)

 Upload File

Case Closure & Review

Finalizing the case, ensuring all loose ends are tied up, and conducting a post-case review.

Case Closure Date

Enter date...

Summary of Case Outcomes

Write something...

Hi there, need help?

Total Case Costs (USD)

Enter a number...

Case Outcome

- Settled
- Judgment (Client)
- Judgment (Opponent)
- Dismissed
- Other

Lessons Learned / Process Improvements

Write something...

Client Satisfaction (Rate)

- 1 - Very Dissatisfied
- 2 - Dissatisfied
- 3 - Neutral
- 4 - Satisfied
- 5 - Very Satisfied

Attorney Signature

Hi there, need help?