

# Limited Scope Representation Toolkit



akron bar  
association



State of Ohio, County of Summit  
Prepared by the Akron Bar Association  
Lawyer Referral and Information Service



## State of Ohio, County of Summit

### Limited Scope Representation or “Unbundled” Legal Services Toolkit

*Prepared by the Akron Bar Association Lawyer Referral and Information Service*

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#### Acknowledgement

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#### Disclaimer

Attorney are strongly encouraged to modify and adapt the enclosed templates and documents for their individual cases. The Akron Bar Association assumes no responsibility for the indiscriminate or improper use of the examples provided herein, nor for the outcome of any case or legal action in which an attorney who uses this toolkit is involved.



## Introduction

Dear Valued Colleagues,

Limited scope representation may be a benefit for everyone involved in the legal process: clients receive legal advice and representation where otherwise they would be struggling on their own in a sometimes frightening world of complex procedures; lawyers have the opportunity to utilize and monetize their skills; judges experience a smoother courtroom process when a client is represented in court by counsel.

With the additions to the Ohio Rules of Civil Procedure published July 1, 2018, the practice of limited scope representation common in other areas of the country now has a firm foundation in Ohio procedural law. The Ohio Rules of Professional Conduct permit lawyers to limit the scope of their appearance, provided that doing so is reasonable under the circumstances and the parameters of the representation are clearly communicated in writing, thus providing a guideline to protect lawyers from ethical pitfalls.

Lawyers have been representing client in a limited manner for quite some time. Domestic Relations attorneys often do only the child custody or QDRO portions of a divorce proceeding. Attorneys advise a *pro se* litigant from the sidelines. A client may initiate a case on their own but need help when it comes to settlement negotiations. There are many opportunities for clients of limited means to obtain limited scope legal services and therefore experience the benefits of legal counsel and advocacy.

We are happy to provide this toolkit as a starting point for you to evaluate your practice and consider whether taking on limited scope representation of clients is the right fit for you. We hope that the resources in the toolkit will help keep your limited scope services on a sure ethical and procedural footing.

The most important element to remember in taking on limited scope representation of a client is effective communication. Always have a frank, in-person discussion of what is expected of you and your client. Always **communicate to the client clearly in writing** the scope of the agreed-upon representation and notify the court of your appearance and withdrawal of appearance. Approval from the court may be necessary if litigation is pending.

Expanding your practice to include limited scope representation allows you to take on more paying clients and assist more individuals in need. The Akron Bar Association is thrilled to be able to assist our members and lawyers throughout Summit County in developing this winning strategy.

Sincerely,

The Akron Bar Association  
Lawyer Referral and Information Service Committee

## Applicable Rules

### Limited Scope Appearance in the Ohio Rules of Professional Conduct

#### Prof. Cond. R. 1.2(c)

A lawyer may limit the scope of a new or existing representation if the limitation is reasonable under the circumstances and communicated to the client, preferably in writing.

#### Comment

##### Agreements Limiting Scope of Representation

[6] [RESERVED]

[7] Although division (c) affords the lawyer and client substantial latitude in defining the scope of the representation, any limitation must be reasonable under the circumstances. If, for example, a client's objective is limited to securing general information about the law that the client needs in order to handle a common and typically uncomplicated legal problem, the lawyer and client may agree that the lawyer's services will be limited to a brief telephone consultation. Such a limitation would not be reasonable if the time allotted was not sufficient to yield advice upon which the client could rely. In addition, the terms upon which representation is undertaken may exclude specific means that might otherwise be used to accomplish the client's objectives. Such limitations may exclude actions that the client thinks are too costly or that the lawyer regards as repugnant or imprudent. Although an agreement for a limited representation does not exempt a lawyer from the duty to provide competent representation, the limitation is a factor to be considered when determining the legal knowledge, skill, thoroughness, and preparation reasonably necessary for the representation. See Rule 1.1.

[7A] Written confirmation of a limitation of a new or existing representation is preferred and may be any writing that is presented to the client that reflects the limitation, such as a letter or electronic transmission addressed to the client or a

court order. A lawyer may create a form or checklist that specifies the scope of the client-lawyer relationship and the fees to be charged. An order of a court appointing a lawyer to represent a client is sufficient to confirm the scope of that representation.

## **Limited Scope Appearance in the Ohio Rules of Civil Procedure**

### **Rule 3**

#### **(B) Limited Appearance by Attorney.**

An attorney's role may be limited in scope, as authorized by Prof.Cond.R. 1.2(c), if that scope is specifically described in a "Notice of Limited Appearance" stating that the limited appearance has been authorized by the party for whom the appearance is made, and filed and served in accordance with Civ.R. 5 prior to or at the time of any such appearance. The attorney's limited appearance terminates without the necessity of leave of court, upon the attorney filing a "Notice of Completion of Limited Appearance" filed and served upon all parties, including the party for whom the appearance was made, in accordance with Civ.R. 5. If there is no objection within ten days of service of this notice, then no entry by the court is necessary for the termination of the limited appearance to take effect.

#### **Staff Note (July 1, 2018 Amendment)**

#### **New Division (B): Limited Appearance by Attorney.**

This and other July 1, 2018 amendments to the Ohio Rules of Civil Procedure encourage attorneys to assist pro se parties on a limited basis without undertaking the full representation of the client on all issues related to the legal matter for which the attorney is engaged. By these amendments, the Supreme Court seeks to enlarge access to justice in Ohio's courts as recommended by a 2006 Report of the Court's Task Force on Pro Se & Indigent Litigants and by a 2015 Report of the Court's Task Force on Access to Justice.

New division (B) permits attorneys to enter a limited appearance on behalf of an otherwise unrepresented litigant. The effect of the limited appearance is to permit

an attorney to represent a client on one or more matters in a lawsuit but not on all matters. While normally leave of court is required if an attorney seeks to withdraw from representation, under this provision, leave of court is not required for withdrawal from the case at the conclusion of a properly noticed limited appearance, provided the attorney files and serves the proper Notice of Completion of Limited Appearance in accordance with Civ.R. 5.

The benefits of division (B) are obtained only by filing a notice of limited appearance identified as such. The notice of limited appearance must clearly describe the scope of the limited representation and state that the limitation of appearance has been authorized by the party for whom the appearance is made. It is intended that any doubt about the scope of the limited representation be resolved in a manner that promotes the interests of justice and those of the client and opposing party.

## **Rule 5**

### **(B) Service: how made.**

(1) Serving a party; serving an attorney. Whenever a party is not represented by an attorney, service under this rule shall be made upon the party. If a party is represented by an attorney, service under this rule shall be made on the attorney unless the court orders service on the party. Whenever an attorney has filed a notice of limited appearance pursuant to Civ.R. 3(B), service shall be made upon both that attorney and the party in connection with the proceedings for which the attorney has filed a notice of limited appearance.

### **Staff Note (July 1, 2018 Amendment)**

#### **Division (B)(1): Serving a Party; Serving an Attorney.**

This and other July 1, 2018 amendments to the Ohio Rules of Civil Procedure encourage attorneys to assist pro se parties on a limited basis without undertaking the full representation of the client on all issues related to the legal matter for which the attorney is engaged. By these amendments, the Supreme Court seeks to enlarge access to justice in Ohio's courts as recommended by a 2006 Report of the Court's Task Force on Pro Se & Indigent Litigants and by a 2015 Report of the Court's Task Force on Access to Justice.



The amendment to Civ.R. 5(B)(1) makes clear that when a notice of limited appearance has been filed by an attorney, an opposing party shall continue serving documents upon the party throughout the duration of the limited appearance while also serving the attorney. The purpose of the amendment is to assure appropriate service upon counsel to represented parties, but also to assure that a client being represented on a limited basis has copies of all key documents in the litigation.

## **Attorney Checklist: When may I accept limited scope representation?**

Attorneys are often reluctant to take on limited representation of a pro se litigant out of fear that accepting responsibility for certain aspect of a case will put them “on the hook” for the entirety of the case. However, attorneys already provide limited representation through legal aid organizations and at legal clinics and the Ohio Rules of Professional Conduct support a lawyer taking on limited representation of a client within certain guidelines. The limitations must be reasonable and communicated clearly to the client. Additionally, effective July 1, 2018, the Ohio Rules of Civil Procedure have been updated to include specific provisions that allow an attorney to appear in a limited manner on behalf of an otherwise pro se litigant.

While the rules provide a framework for effective limited scope representation, an attorney needs to evaluate each potential client and carefully consider if unbundled services are appropriate. An attorney needs to explore whether or not taking on the legal matter at hand in a limited manner is reasonable under the circumstances.

The “reasonable under the circumstances” requirement of Prof. Cond. R. 1.2(c) demand that the lawyer strike a balance between providing selective legal services at a cost less than full services while still guaranteeing entirely competent representation. The complexity of the legal matter and the abilities of the client are the critical factors to be considered.

An attorney might ask the following questions:

- Can this case be divided up into specific steps and tasks that the potential client and I can separately perform?
- Does the potential client have reasonable expectations about their ability to handle the parts of the case not being undertaken by me?
- Does the potential client possess the ability to understand basic legal terms and follow my instructions?
- Is the potential client able to communicate in English and speak effectively on their own behalf in court?
- Does the potential client have access to a computer for e-filing and preparing typed documents?
- Do I believe the client has a reasonable chance of prevailing if I agree to limited representation?

## Attorney and Client Checklist: Task Assignment

Once an attorney has decided that limited scope representation is reasonable given the circumstances of the legal matter at hand and the specific client, the next step is to communicate thoroughly the parameters of the representation.

In consideration of Prof. Cond. R. 1.2(c), during the initial consultation an attorney should discuss with the potential client the difference between full and limited scope representation; the roles and responsibilities of both attorney and client; the procedure for making changes to the representation agreement; and the local rules for filing and service.

Prof. Cond. R. 1.1 and 1.3 emphasize the duty of a lawyer to be competent and to exercise diligence. Competent representation means having “the legal knowledge, skill, thoroughness, and preparation reasonably necessary for the representation.” Diligence includes promptness and strong advocacy for the client’s interests. An attorney should only accept limited scope representation in areas where they are otherwise already competent and skilled.

While limited scope representation allows client-consumers to benefit from a lawyer’s unique skills at costs less than that of full representation, it can also mean the attorney must accept liabilities not associated with full representation.

In a limited scope situation, the attorney needs to be proactive in communicating to the client what the attorney is doing and what is expected of the client. If the attorney fails to clarify the parameters of, and changes to, the scope of representation, he or she risks accepting responsibility for the entire case, even for aspects for which the attorneys was not prepared.

The examples in this toolkit are designed to help you set boundaries for limited scope representation that will protect your professional reputation.

The following chart serves as a sample checklist of attorney and client responsibilities that can be attached to the engagement agreement in order to clearly delineate who is responsible for the individual tasks.



### Attorney/Client Checklist

**Attorney:** \_\_\_\_\_

**Client:** \_\_\_\_\_

SERVICES/TASKS TO BE PERFORMED	ATTORNEY TO DO	CLIENT TO DO
<b>Legal Advice</b>		
Advise on rights, responsibilities, procedures, and strategy on a one-time basis Describe:		
Advise on rights, responsibilities, procedures, and strategy on an ongoing basis Describe:		
<b>Document Preparation</b>		
Draft documents on behalf of client 1. 2. 3.		
Review documents prepared by client 1. 2. 3.		
Correspondence 1. 2. 3.		
File and serve documents Describe:		
<b>Investigation and Discovery</b>		
Factual Investigation 1. Contact witnesses 2. Obtain expert witnesses 3. Obtain documents and records 4. Public record searches		



5. Other (describe)		
Prepare discovery requests		
Review discovery requests prepared by client		
Prepare discovery responses		
Review discovery responses prepared by client		
Take or defend depositions		
<b>Settlement Negotiations</b>		
Review an existing settlement offer or agreement		
Negotiate specific issue(s) for settlement Describe:		
<b>Trial Preparations</b>		
Draft or review subpoenas		
Draft or respond to motions		
Prepare arguments or outline witness testimony		
<b>Court Appearances</b>		
Appear in court one time (list date, time, occurrence)		
Appear in court on an on-going basis		
Represent client at trial		
<b>Other</b>		
1.		
2.		
3.		
4.		
5.		

## Sample Engagement Agreement for Legal Services

This agreement (Agreement) is made between \_\_\_\_\_  
(Client), and \_\_\_\_\_ (Attorney). Attorney represents  
Client and does not represent any other person in this matter.

- 1. Client's Goals.** Client has engaged Attorney to help them achieve certain goals. Client's goals in this case include:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

- 2. Scope of the Representation.** Client and Attorney have discussed the difference between full representation and limited scope representation and agree that limited scope representation is an appropriate option for Client at this time based on Client's case, abilities, goals, and budget. To accomplish Client's goals, Attorney will provide legal services that are limited to the following (describe scope of representation – be specific):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

- 3. Attorney Responsibilities.**

- a. Assigned Services.** Client and Attorney have completed the Attorney and Client Task Assignment Checklist (Checklist) and attached it to this document. Attorney is only responsible for completing the services in the "Attorney To Do" column of the Checklist where the Attorney has affixed his/her initials. Client is responsible for completing all other tasks, including, but not limited to, those tasks marked "Yes" in the "Client To Do" column of the Checklist.



- b. **Additional Services.** If Attorney is requested or required to provide additional services, Attorney and Client will complete and sign a new Checklist and Engagement Agreement for Legal Services. Client will pay additional fees (to be agreed upon by Client and Attorney) for additional services.

**4. Client Responsibilities and Control.** Client will handle all parts of the case except those that are assigned to Attorney in the Checklist. Client will be in control of the case and will be responsible for all decisions made during the case. Client agrees to:

- a. Cooperate with Attorney and Attorney's staff by promptly giving them all information they reasonably request about the case.
- b. Promptly tell Attorney anything they know about the case, including any concerns they have, and to update Attorney as new information or concerns arise.
- c. Promptly provide Attorney with copies of all court documents and other written materials that Client receives or sends out about the case.
- d. Immediately provide Attorney with any new court documents, including pleadings or motions, received from the other party or the other party's attorney.
- e. Keep all documents related to the case together and organized in a file for Attorney to review as needed.
- f. Maintain an active phone number and email address by which Attorney can communicate with Client about the representation and where Client can receive documents and notifications from Attorney and the circuit clerk's office in litigated matters. Client will check their voicemail and email account at least once every couple of days. If there are circumstances that prevent Client from doing this, Client will decide what the best way for Attorney to communicate with Client is and will provide written notice to Attorney of their decision.

**5. Method of Payment for Services.**

- a. **Legal Fees.** In exchange for the legal services provided by Attorney, Client agrees to pay a fee of \$\_\_\_\_\_. Client has initialed the payment option below that works best for them.



\_\_\_\_\_ Client will pay the entire flat fee listed above when this Agreement is signed.

\_\_\_\_\_ Client will pay a partial fee of \$\_\_\_\_\_ when this agreement is signed. Client will pay the remaining \$\_\_\_\_\_ by or before \_\_\_\_\_.

\_\_\_\_\_ Client will pay off the flat fee listed above in installments as described here:

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- b. **Costs.** The fee does not include costs and expenses incurred to provide those services. In addition to the fee above, Client agrees to pay any costs and expenses including, but not limited to, fees associated with filing the case, private investigators, expert witnesses, court reporters and transcripts, service of subpoenas, and travel expenses which Attorney considers necessary and proper for the preparation and execution of the Attorney's commitments. Attorney will seek Client's approval before incurring these costs and explain why these costs are necessary to accomplish Client's goals. Client agrees to pay costs within thirty (30) days of receiving an associated invoice.
- 6. Right to Seek Advice of Other Counsel.** Client has the right to ask another attorney for advice and professional services at any time during or following this Agreement.
- 7. No Guarantees.** Client agrees that Attorney has not made any promises or guarantees that their involvement in the case will cause a certain outcome or result.
- 8. Early Termination.** Client and Attorney have entered into a voluntary relationship and may end that relationship at any time. Client may end the relationship for any reason. Attorney may end the relationship if Attorney learns that Client has misrepresented or failed to disclose material facts to Attorney, if Client fails to follow Attorney's legal advice, if Client fails to cooperate in the representation, if Client fails to make the agreed upon payment(s), or for any other reason allowed by the Ohio Rules of Professional Conduct. If the relationship ends, Client has a right to request a copy of their file, which includes all of the information given by Client to Attorney and any legal work completed by Attorney on Client's behalf.



Client is responsible for payment of all outstanding costs and expenses incurred prior to termination and attorney shall have a right to keep an appropriate proportion of the fees paid or due based on the legal services provided to Client. In the event there is a disagreement over the fees owed to Attorney, Ohio law provides attorneys with the right to seek judicial relief for outstanding fees. (Note: Court approval may be required for withdrawal from a case in which there is pending litigation.)

**9. Withdrawal of Attorney.** Attorney's obligation to Client is over once Attorney has completed all of the services identified in the attached Checklist. Civ.R. 3(B) allows for the Attorney to terminate the limited scope appearance by filing a "Notice of Completion of Limited Appearance" and serving such Notice upon all parties, including the party for whom the appearance was made, in accordance with Civ.R. 5. If Client files no objection within ten days of service of such notice, then the termination of the limited appearance takes effect. Even if Attorney withdraws, Client must pay Attorney for all services provided and must reimburse Attorney for all out-of-pocket costs incurred prior to the withdrawal.

**10. Release of Client's Papers and Property.** Once all of Attorney's services are performed, Attorney will return all original documents to Client. If Client requests that all paper and property be returned, Attorney will release all of Client's papers and property to Client within a reasonable period of time. If Client does not make this request or give other direction, Attorney may dispose of the papers and property after seven (7) years following completion of services.

**11.** Client has carefully read this Agreement and understands all of its provisions. Client agrees with the following statements by initialing each one:

- a.  Attorney has accurately described my goals in Paragraph 1.
- b.  I am responsible for my case and will be in control of my case at all times as described in Paragraph 4.
- c.  The services that I want Attorney to perform in my case are identified by the word "YES" in the "Attorney To Do" column of the Checklist that is attached to this Agreement. I take responsibility for all other aspects of my case, including, but not limited to, those tasks assigned to me under the "Client To Do" column in the Checklist.



- d.  Attorney discussed the difference between full representation and limited scope representation and I understand and accept the limitations on the scope of Attorney's responsibilities identified in Paragraphs 2 and 3.
- e.  I will pay Attorney for services as described in Paragraph 5.
- f.  I understand that any amendments to this Agreement must be in writing as described in Paragraph 3.
- g.  I acknowledge that I have been advised by Attorney that I have the right to consult with another independent attorney to review this Agreement and to advise me on my rights as a client before I sign this Agreement.

**Client Signature** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Attorney Signature** \_\_\_\_\_

**Date:** \_\_\_\_\_



**IN THE COURT OF COMMON PLEAS  
STATE OF OHIO, COUNTY OF SUMMIT**

_____	)	
Plaintiff/Appellant	)	Case No.
	)	
v.	)	Judge
	)	
_____	)	
Defendant/Appellee	)	<b><u>NOTICE OF LIMITED SCOPE</u></b>
	)	<b><u>APPEARANCE</u></b>

1. Now comes Attorney \_\_\_\_\_ and hereby gives notice to this Court of limited scope representation of Party \_\_\_\_\_, who is Plaintiff Petitioner Defendant Respondent [circle one] in this matter. Party and Attorney have entered into a written agreement dated \_\_\_\_\_, establishing that the Attorney will provide limited scope representation to the Party in the above-captioned matter as further specified in Paragraphs 2 and 3, below.

2. The attorney appears pursuant to Civ.R. 3(B). This appearance is limited in scope to the following matter(s) in which the attorney will represent the Party [check and complete all that apply]:

- In the court proceeding (identify) \_\_\_\_\_ on the following date: \_\_\_\_\_
  - And in any continuance of that proceeding
- At the trial on the following date: \_\_\_\_\_
  - And in any continuance of that trial
  - And until judgment
- At the following deposition(s): \_\_\_\_\_



Other (specify the scope and limits of representation):

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3. If this appearance does not extend to all matters to be considered at the proceeding(s) above, identify the discrete issues within each proceeding covered by this appearance:

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4. The attorney may withdraw following completion of the limited scope representation specified in this appearance as follows:

Pursuant to Civ.R. 3(B), the attorney’s limited appearance terminates without the necessity of leave of court, upon the attorney filing a “Notice of Completion of Limited Appearance” filed and served upon all parties, including the party for whom the appearance was made, in accordance with Civ.R. 5.

5. Service of pleadings on the attorney and party named above shall be made in accordance with Civ.R. 5.

6. By signing below, the Party being represented under this Limited Scope Appearance:

a. agrees to the delivery of all court papers to the addresses specified below; and

b. agrees to inform the court, all counsel of record, and all parties not represented by counsel of any changes to the Party’s address information listed below during the limited scope representation.



---

Signature of Attorney

---

Name of Attorney

---

Attorney's Address

---

Attorney's Telephone Number

---

Attorney's E-Mail Address

---

Attorney Registration Number

---

Signature of Party

---

Name of Party

---

Party's Address

---

Party's Telephone Number

---

Party's E-Mail Address

---

Date



## CERTIFICATE OF SERVICE

In accordance with Civ.R.3(B), a copy of the foregoing **Notice of Limited Scope Appearance** was set to the Party I am representing, all counsel of record, and all parties not represented by counsel, in the above-captioned action via regular U. S. Mail on \_\_\_\_\_, namely:

Name [Attorney Reg. No]  
Address  
Attorney for \_\_\_\_\_ / Party [Title]

Name [Attorney Reg. No]  
Address  
Attorney for \_\_\_\_\_ / Party [Title]

Name [Attorney Reg. No]  
Address  
Attorney for \_\_\_\_\_ / Party [Title]

Respectfully submitted,

\_\_\_\_\_  
Attorney Name [Attorney Reg. No.]



**IN THE COURT OF COMMON PLEAS  
STATE OF OHIO, COUNTY OF SUMMIT**

_____	)	
Plaintiff/Appellant	)	Case No.
	)	
v.	)	Judge
	)	
_____	)	
Defendant/Appellee	)	<b><u>NOTICE OF COMPLETION OF LIMITED SCOPE APPEARANCE</u></b>
	)	

1. Now comes Attorney \_\_\_\_\_ and hereby gives notice to this Court of the completion of limited scope representation of Party \_\_\_\_\_, who is Plaintiff Petitioner Defendant Respondent [circle one] in this matter.

2. Pursuant to Civ.R. 3(B), the attorney’s limited appearance terminates without the necessity of leave of court, upon the attorney filing a “Notice of Completion of Limited Appearance” filed and served upon all parties, including the party for whom the appearance was made, in accordance with Civ.R. 5.

3. I have completed all services within the scope of the Notice of Limited Scope Appearance, and I have completed all acts ordered by the court within the scope of that appearance.

4. NOTICE TO PARTY \_\_\_\_\_: You have the right to object to my withdrawal as your lawyer if you believe that I have not finished everything that I had agreed to do. To object, you must file an objection with the Court within ten (10) days of receipt of this notice.

On the same day that you file the Objection with the court, send copies of it to me and to the other counsel of record and parties not represented by counsel.

5. Pursuant to Civ.R. 3(B), if there is no objection within ten days of service of this notice, then no entry by the court is necessary for the termination of the limited appearance to take effect.



If no objection is filed, service of documents upon me under Civ.R. 5 will no longer be required as of ten (10) days after service of this Notice.

Service of documents on Party \_\_\_\_\_ continues to be required.

\_\_\_\_\_  
Signature of Attorney

\_\_\_\_\_  
Name of Attorney

\_\_\_\_\_  
Attorney's Address

\_\_\_\_\_  
Attorney's Telephone Number

\_\_\_\_\_  
Attorney's E-Mail Address

\_\_\_\_\_  
Attorney Registration Number

\_\_\_\_\_  
Signature of Party

\_\_\_\_\_  
Name of Party

\_\_\_\_\_  
Party's Address

\_\_\_\_\_  
Party's Telephone Number

\_\_\_\_\_  
Party's E-Mail Address

\_\_\_\_\_  
Date



**CERTIFICATE OF SERVICE**

In accordance with Civ.R.3(B), a copy of the foregoing **Notice of Completion of Limited Scope Appearance** was set to the Party I am representing, all counsel of record, and all parties not represented by counsel, in the above-captioned action via regular U. S. Mail on \_\_\_\_\_, namely:

Name [Attorney Reg. No]  
Address  
Attorney for \_\_\_\_\_ / Party [Title]

Name [Attorney Reg. No]  
Address  
Attorney for \_\_\_\_\_ / Party [Title]

Name [Attorney Reg. No]  
Address  
Attorney for \_\_\_\_\_ / Party [Title]

Respectfully submitted,

\_\_\_\_\_  
Attorney Name [Attorney Reg. No.]



## Sample Disengagement Letter

[Date]

Via U.S. Mail [or other method]

[Client Name]

[Client Address 1]

[Client Address 2]

[Client Email]

Re: Termination of Legal Services

Dear \_\_\_\_\_,

Thank you for allowing [Law Firm Name] to represent you in [Legal Matter].

I have completed the scope of legal representation agreed to in our Engagement Agreement for Legal Services, including all the tasks on the Checklist attached to the Engagement Agreement. Accordingly, our attorney-client relationship has come to an end and I am no longer providing legal representation on your behalf. I am therefore closing your file.

I will retain a copy of your file for seven (7) years after which I may destroy all documents in your file. You should keep all of your information and documentation concerning this matter in a safe place in case you need it in the future. If you would like to have copies of anything from my file, please let me know as soon as possible.

It has been a pleasure working with you. I hope this matter was concluded to your satisfaction. If you or someone you know needs legal assistance in the future, please feel free to contact my office to arrange a consultation.

Best regards,

[Law Firm Name]

[Attorney's Name]