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Managing Your Money—Applications

Checklist: Documents to Bring to Your Attorney

Sometimes disputes between creditors and debtors arise over late payments, the amount due, or a variety of other issues. Many times, these matters can be resolved with minimal difficulty. However, it is sometimes necessary to seek legal help to sue or to defend against a suit. When that happens, this list will help you collect important documents to show your attorney.

- ___ Summons and Complaint from the other side, if any
- ___ ALL your files regarding the other party
- ___ ALL your correspondence with or regarding the other party
- ___ ALL insurance policies relevant to the matter
- ___ Calendars or daytimers if they refer to the other party
- ___ Phone logs and message pads if they refer to the other party
- ___ Contracts with the other party, if any
- ___ E-mails communications
- ___ Tax Returns
- ___ Financial statements
- ___ Canceled checks
- ___ Bills or invoices
- ___ Receipts
- ___ Files from previous litigation
- ___ Files from previous attorneys