



CHECKLIST FOR THE CLIENT LETTER*

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Client letters can cover a variety of different topics and purposes. This checklist addresses topics you may want to consider when communicating with a client in writing.

I. Formatting

- ☐ **Letterhead:** Use official firm/clinic letterhead.
- ☐ **Date:** Include the date the letter is sent.
- ☐ **Recipient Information:** Include full name, title, and address.
- ☐ **Re: Line:** Clearly state the matter name, case number, and topic (e.g., *Re: Smith v. Doe, Case No. 12-3, Settlement Offer*).
- ☐ **Sign-off:** Use professional closing and include your name and title.

II. Introduction and Purpose

- ☐ **Professional Greeting:** Open with a friendly but professional salutation.
- ☐ **Purpose Statement:** Immediately state the purpose of the letter (e.g., providing advice, summarizing a meeting, requesting documents).
- ☐ **Summary/Answer:** State the conclusion or recommendation at the beginning, rather than burying it at the end.

III. Explanation and Analysis

- ☐ **Overview:** Provide the necessary explanation in plain, understandable terms, which may range from a brief summary to a more detailed legal analysis depending on the purpose of the letter.
- ☐ **Relevant Law:** Explain the applicable law in plain, understandable terms (if needed).

* Created by Alexandra Kotter (2026).

- ❑ **Significant Facts:** Highlight the key facts that affect the outcome or advice but keep it concise.
- ❑ **Risks and Uncertainty:** Address potential risks, uncertainties, or alternative outcomes where relevant.
- ❑ **Client Focus:** Anticipate and answer the client's likely follow-up questions.
- ❑ **Clarity:** Avoid unnecessary legal jargon and clearly explain it if it is used.

IV. Conclusion and Action Items

- ❑ **Conclusion:** Provide a clear summary of the advice or conclusion.
- ❑ **Action Items/Next Steps:** Explicitly list what the client needs to do, what the attorney will do, and all relevant deadlines.
- ❑ **Follow-up:** Propose a timeline or method for the next conversation.

V. Tone and Style

- ❑ **Professional Tone:** Ensure the tone is professional but approachable.
- ❑ **Plain Language:** Avoid unnecessary legalese.
- ❑ **Accuracy:** Ensure all dates, names, and case facts are accurate.
- ❑ **Confidentiality:** Include a confidential disclaimer if necessary.
- ❑ **Review:** Check for spelling, grammar, and consistency.

Sources

Cuny School of Law, *Example Client Letter*, LAW.CUNY.EDU (October 23, 2006), <https://www.law.cuny.edu/academics/academic-resources-support/legal-writing-center/student-resources/drafting-client-letters/>.

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