



**THE LEGACY**  
LAWYERS

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## “21 Secrets for Cutting Legal Fees in Half”

This workbook is designed to help you follow along the audio CD under the same title.

By following the “secrets” you will become the best possible legal client, which will likely lead to better results in your case; however, this program is designed to help people that are paying for legal fees based on a billable hour type attorney services agreement. These “secrets” will not help minimize legal fees in flat fee, contingency, or statutory fee type agreements.

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**Secret One:**

1. **FULLY DISCLOSE ALL INFORMATION TO YOUR ATTORNEY, BOTH GOOD AND BAD.**
  - a. **MAKE SURE YOUR ATTORNEY UNDERSTANDS YOU—COMMUNICATION IS A TWO WAY STREET (SENDER TO RECEIVER).**
  - b. **IT EFFECTS CASE STRATEGY**
  - c. **UNINFORMED ATTORNEYS ARE AT A DISTINCT DISADVANTAGE AND WILL NEED TO DO MORE WORK TO ACHIEVE YOUR GOALS.**
  - d. **IT COULD CAUSE YOUR ATTORNEY TO LOSE CREDITABILITY WITH THE JUDGE AND THUS HAVE TO PRODUCE MORE EVIDENCE TO MAKE EVEN THE SMALLEST POINTS**

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**Secret Two:**

2. **START WITH THE END GAME.**
  - a. **ALLOW YOUR ATTORNEY TO EVALUATE THE FACTS AND CIRCUMSTANCES OF THE CASE, AND RELEVANT LEGAL AUTHORITY**
  - b. **TOGETHER WITH YOUR ATTORNEY, SET AND PRIORITIZE YOUR GOALS**
  - c. **AVOID EXPLORATORY LITIGATION (THROWING SPAGHETTI AGAINST THE WALL TO SEE WHAT STICKS)**

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Secret Three:

- 3. **SET A STRATEGY.**
  - a. **MAKE SURE THERE IS A STRATEGY TO ACHIEVE EACH GOAL**
  - b. **STAY FOCUSED ON VALUE. DON'T THROW GOOD MONEY AFTER BAD.**
  - c. **STICK TO THE STRATEGY**

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Secret Four:

- 4. **KEEP EMOTIONS IN CHECK**
  - a. **EMOTIONS ARE PART OF EVERY HUMAN RELATIONS LAW CASE**
  - b. **CASES OFTEN INVOLVE A FAMILY HISTORY OF UNPLEASANT EXPERIENCES**
  - c. **TRY TO APPROACH YOUR CASE FROM A BUSINESS PROSPECTIVE**

Secret Five:

- 5. **DON'T TALK TO OTHERS ABOUT YOUR CASE**
  - a. **YOUR CASE IS UNIQUE, LAWS CHANGE ALL THE TIME**
  - b. **LIMIT COMMUNICATIONS TO REPAIRING RELATIONSHIPS**
  - c. **CALLING OTHER ATTORNEYS IS VERY RISKY—IF YOU DO IT, THEN TAKE IT SERIOUSLY. PROVIDE THEM WITH A COPY OF YOUR FILE**

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Secret Six:

- 6. **ALWAYS ARRIVE 10 TO 15 MINUTES EARLY**
  - a. **DELAYS INCREASE COSTS**
  - b. **COURTS HOLD CLIENTS TO A HIGHER STANDARD FOR TIMELINESS**
  - c. **CONTROL THE THINGS YOU CAN—YOUR OWN TIME**

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## Secret Seven:

- 7. KEEP A DETAILED JOURNAL OF FACTS**
  - a. WRITE ALL FACTS ABOUT WHY YOU WANT TO HIRE AN ATTORNEY**
  - b. ALL ENTRIES SHOULD BEGIN WITH DATE, TIME, FULL NAMES, AND ALL SURROUND CIRCUMSTANCES, THEN MATERIAL FACTS**
  - c. KEEP THE JOURNAL THROUGHOUT THE CASE**

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## Secret Eight:

- 8. FOLLOW YOUR ATTORNEY'S ADVICE**
  - a. THE ATTORNEY/CLIENT RELATIONSHIP IS EITHER ON OR OFF.**
  - b. NEVER PROCEED WITH AN ATTORNEY IF YOU'RE ONLY HALF COMMITTED**
  - c. DON'T TAKE A DIFFERENT PATH. STAND UNITED AS ONE**

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Secret Nine:

9. **WRITE DOWN AT LEAST 5 QUESTIONS BEFORE CALLING YOUR ATTORNEY**
  - a. **KEEP A SEPARATE JOURNAL FOR YOUR QUESTIONS AND ANSWERS—TO READ AND AVOID ASKING THE SAME QUESTION MORE THAN ONCE**
  - b. **A MINIMUM CHARGE FOR ONE PHONE CALL IS (12 MINUTES)—YOU CAN EITHER ASK 1 QUESTION 5 TIMES FOR A TOTAL BILLABLE TIME OF 1 HOUR, OR 5 QUESTIONS IN 1 CALL FOR A TOTAL BILLABLE TIME 12 MINUTES.**
  - c. **EXCEPTION, NEVER AVOID A CALL IF IT COULD CAUSE SOME HARM OR DELAY YOUR CASE**

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Secret Ten:

10. **FILL OUT ALL WORKSHEETS AND FORMS COMPLETELY, IN DETAIL, AND AS ACCURATELY AS POSSIBLE**
  - a. **LEGAL MATTERS REGULARLY INCLUDE THE TRANSFER OF SPECIFIC INFORMATION. FILING PAPERS WITH THE COURT, DISCOVERY REQUESTS, AND TO SATISFY BURDENS OF PROOF**
  - b. **IF YOUR ATTORNEY REQUESTS SPECIFIC INFORMATION, IT IS NECESSARY TO YOUR CASE**
  - c. **IF YOU DON'T PROVIDE IT UPON REQUEST, SOMEONE FROM YOUR ATTORNEY'S OFFICE WILL CALL YOU FOR THE INFORMATION. THOSE CALLS CAN ADD UP!**

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**Secret Eleven:**

**11. REVIEW ALL BILLING STATEMENTS**

- a. **TIME ENTRIES SHOULD BE WRITTEN IN A WAY THAT COMMUNICATES WHAT'S BEING DONE ON YOUR CASE. THIS IMPROVES COMMUNICATION, AND IMPROVED COMMUNICATION ALWAYS SAVES MONEY.**
- b. **LOOK FOR TIME ENTRY MISTAKES. IF YOU FIND SOMETHING THAT LOOKS WRONG, CONTACT THE ATTORNEY RIGHT AWAY FOR CLARIFICATION**

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**Secret Twelve:**

**12. LET YOUR ATTORNEY CONTROL THE CASE**

- a. **IF YOU THINK YOU CAN DO A BETTER JOB THAN YOUR ATTORNEY, FIND ANOTHER ATTORNEY**
- b. **NEVER TRY TO PRACTICE LAW USING YOUR ATTORNEY'S LICENSE**
- c. **"TOO MANY COOKS SPOIL THE BROTH"**

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Secret Thirteen:

- 13. **NEGOTIATE SETTLEMENT THROUGH YOUR ATTORNEY, AND NEVER DIRECTLY WITH THE OPPOSING PARTY**
  - a. **GOOD ATTORNEYS BUILD LEVERAGE TO OBTAIN THE BEST POSSIBLE RESULTS FOR THEIR CLIENTS. DON'T GIVE IT ALL AWAY TO FEEL GOOD ABOUT YOURSELF.**
  - b. **CIRCUMVENTING YOUR ATTORNEY IN SETTLEMENT WILL COST YOU MONEY.**
  - c. **UNSUCCESSFUL SETTLEMENTS WILL END IN COSTLY LITIGATION**

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Secret Fourteen:

- 14. **HONOR YOUR ATTORNEY SERVICES AGREEMENT**
  - a. **WHAT WOULD YOU DO IF YOUR BOSS STOP PAYING YOUR SALARY? HOW WOULD YOU WORK HABITS CHANGE IF YOU WERE PAID ONE WEEK, BUT NOT THE NEXT? ATTORNEYS AND THEIR STAFF ARE JUST LIKE YOU.**
  - b. **INTERRUPTIONS IN THE REGULAR FLOW OF YOUR CASE WILL COST YOU MONEY. IT IS MORE EXPENSES TO START AND STOP, THEN TO KEEP THE FLOW GOING.**
  - c. **KEEPING UP WITH PAYMENTS ALSO SHOWS EVERYONE THAT YOU ARE COMMITTED TO THE CASE. YOUR ATTORNEYS AND THEIR STAFF WILL MAKE A**



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Secret Fifteen:

- 15. ALWAYS PREFORM REQUIRED TASKS IN A TIMELY MANNER
  - a. YOU WILL BE ASKED TO DO THINGS LIKE DELIVER DOCUMENTS, RESPOND TO WRITTEN QUESTIONS, AND REVIEW AND SIGN COURT DOCUMENTS. DO THEM AS FAST AS POSSIBLE. COMPLETE THE TASK WELL BEFORE THE DEADLINE
  - b. WHILE IT'S TRUE THAT YOUR ATTORNEY MAY BE ABLE TO GET AN EXTENSION OF TIME FOR YOU TO RESPOND TO DISCOVERY REQUESTS, THE PROCESS WILL REQUIRE A FEW PHONE CALLS AND AT LEAST TWO LETTERS, AND MAYBE LEGAL RESEARCH AND REVIEW. IT'S ALL EXTRA WORK, AND FEES, THAT COULD HAVE BEEN AVOIDED.
  - c. LATE RESPONSES CAN ABSOLUTELY DESTROY TIMING REQUIRED TO GET EXCELLENT RESULTS AND COMPLETELY NULLIFY YOUR LEVERAGE

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Secret Sixteen:

- 16. NEVER CHANGE YOUR ATTORNEY WITHOUT A GOOD REASON.
  - a. CAUSES DELAY—WHICH COST YOU MONEY
  - b. A NEW ATTORNEY WILL HAVE TO REVIEW FILE, MEET WITH EXPERTS, AND

MAKE SEVERAL PHONE CALLS TO GET UP TO SPEED

- c. **A NEW ATTORNEY CAN GIVE YOU A FALSE SENSE OF SECURITY—REMEMBER “THE GRASS ISN’T ALWAYS GREENER ON THE OTHER SIDE”**

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Secret Seventeen:

**17. DON’T INSIST THAT THE LAW FIRM ASSIGN PARTICULAR ATTORNEYS OR STAFF MEMBERS DO THE WORK ON YOUR CASE.**

- a. **TASKS ASSIGNED BASED ON EXPERTISE**
- b. **STAFF MEMBERS ARE ASSIGNED BASED ON EFFICIENCY—BEST WRITERS WRITE DECLARATIONS, MOST DETAILED COMPLETE FORMS...**
- c. **MAY LACK MOST CURRENT TRAINING**

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Secret Eighteen:

**18. RESPECT THE LEGAL PROCESS (GO WITH THE FLOW)**

- a. **ALLOW ATTORNEY TO WORK WITHIN THE ESTABLISHED SYSTEM**
- b. **DON’T PUSH TO SETTLE UNTIL YOUR ATTORNEY IS READY**
- c. **HASTE MAKES WASTE. CORRECTING MISTAKES IS DIFFICULT AND COSTLY**

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### Secret Nineteen:

#### 19. DON'T FIGHT WITH YOUR ATTORNEY

- a. WORK TOGETHER
- b. AVOID TEMPTATION TO BLAME ATTORNEY IF THINGS DON'T GO AS PLANNED
- c. ALWAYS SEEK UNDERSTANDING—YOU DON'T HAVE TO BE RIGHT, THE OBJECTIVE IS TO ACHIEVE YOUR LEGAL GOALS

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### Secret Twenty:

#### 20. WHEN THE OPPOSING PARTY IS DOWN, FINISH HIM/HER OFF

- a. DON'T MAKE LITIGATION PART OF YOUR RELATIONSHIP WITH THE OPPOSING PARTY
- b. THIS IS THE TIME TO BE MOST AGGRESSIVE, DON'T LET UP
- c. FORCE THE OPPOSING SIDE TO HIT BOTTOM

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Secret Twenty-one:

- 21. KEEP YOUR PERSONAL CONTACT INFORMATION UPDATED**
- a. **TELEPHONE NUMBERS, ADDRESSES, WORK/HOME/CELL**
  - b. **PROVIDE UPDATED INFORMATION FOR WITNESSES**
  - c. **MAKE SURE SERVICE LISTS INCLUDE CURRENT ADDRESSES—IF AN INTERESTED PARTY MOVES, MAKE SURE YOUR ATTORNEY KNOWS AND INCLUDES THE CHANGE ON THE SERVICE LIST**

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