

**PROJECT MANAGER CHECKLIST**

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

**Project Start Date:** \_\_\_\_\_

**Project Manager Assigned:** TJA JAS SAW KJC CJD (Added to PC Law? Yes / No)

**1. What does the client expect us to do?**

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**2. What do we expect to receive from the client and/or the client's advisors?**

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**3. What are the major components of the project? (circle below)**

**What is the goal for sending each component of the work to the client?**

**When will we send the bill?**

**What is the estimate for the bill?**

<u>Work Product</u>	<u>Goal (Date) to Send</u>	<u>Date to Bill &amp; Estimate Amount</u>
EP	_____	_____ \$ _____
LLC(s)	_____	_____ \$ _____
LLLP	_____	_____ \$ _____
Real Estate Work	_____	_____ \$ _____
Probate	_____	_____ \$ _____
Contract Review	_____	_____ \$ _____

Other: \_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

**4. Responsibilities of Alan:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**5. Responsibilities of PM:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**6. Responsibilities of Other Staff:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**7. Maribeth to schedule follow up meeting or conference call?**

Yes \_\_\_\_\_ (*Meeting or C/C*) When: \_\_\_\_\_

Scheduled? \_\_\_\_\_ (date/time)