

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?

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

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 & 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)