



**TRELLIS**

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## **Finding and Working with an Attorney**

***DISCLAIMER: This outline is a general guide. Be sure to contact an attorney if you have questions or specific issues that need to be addressed.***

A lot of people know legal help and documentation are important, and there are a lot of internet resources out there, but what if you're looking for specific advice or want an attorney to help you navigate everything? There are still a lot of smoke and mirrors around finding a lawyer, knowing if they offer what you need, how much legal services costs, and what working with a lawyer looks like. So this resource is here to clear the air, provide some tips and options, and help you determine the right next steps for your biz!

- 1. When you should get a lawyer.** When the right time to get a lawyer can vary based on each individual. Maybe you want to outsource everything right away and don't want to have to worry if you DIY'd it correctly, maybe you're an experience business owner opening up a new business and you know how to tackle some of the initial legal yourself, or maybe you're just looking for some advice on a contract issue. As lawyers, we're always going to recommend talking to a lawyer the sooner the better, but we also get that's not always an option. To help you decide, we recommend looking at the urgency and complexity of your need, your experience and comfort level with DIYing, and the risk associated with not having legal advice or drafting. Ultimately, it's a personal decision. Do some research, see how you feel, and balance it with your other needs and budget. But before you think "a lawyer is just too expensive" read the rest of this resource and measure it against your options.

### **ALSO!**

Check out our contract templates, which are a great option if you want some good contracts but aren't ready for a lawyer yet. These detailed templates with explanations of how to use them and fill them out give you some of that legal knowledge and support you need before you have a legal budget: <https://www.trellispgh.com/templates>

- 2. How to find legal options.** If you've decided you want to work with an attorney, the next challenge is finding one! Googling for attorneys can be overwhelming, so we always say reaching

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out to fellow business owners to see if they have any referrals of attorneys they've worked with or they recommend is a great option. You can also reach out to local small business development centers to see if they have any recommendations. Many of these organizations partner with, or have networks of, attorneys they work with and can help provide you some names. It is a good idea talk to your fellow business owners and development centers about what your need relates to and to get a few names to talk to.

- 3. How do you know they're the right fit?** There are a couple things to look for when determining if a lawyer is the right fit for you. You want to make sure they practice in the area of help you need, but you also want to make sure it feels right. Lawyers specialize in different areas such as business transactional, real estate, wills and estates, etc. so you want to ask a potential lawyer if they can help you with your need (and don't feel bad if they say no, they just want you to work with the right expert!). You also want to ask if they have familiarity with your industry as a lawyer with knowledge of your industry can help navigate standard practices, expectations, and common issues. You also want to see if they feel like they listen to you, understand your goals, and align with your needs, some of the choice is just gut feeling! And of course, a big question is...cost...more on that next.
- 4. Speaking of Cost...How Much is a Lawyer?** Cost is always a big question when it comes to hiring a lawyer. But like with most things, there are options! Smaller law firms often have more flexibility in pricing and less overhead so they might be able to offer flat rates or lower hourly rates. Larger firms can offer provide a larger diversity of services, but typically have higher rates and less flexibility in rates. Where your business is in its journey might help you decide what is the best fit cost and fit wise. But it's important to know, you can always ask a lawyer for his/her rates and when you get charged. And most attorneys (at least some of us ;) ) offer free initial consultations because it is important to make sure it's a right fit on both sides!
- 5. Engaging an Attorney.** Once you're ready to move forward, an attorney will typically send you an engagement letter, which is the fancy lawyer speak for a contract. You will also likely be asked some sort of retainer or deposit. These funds are common and help both sides commit to the relationship and the work. Client funds, until earned, are often held in special client escrow accounts (meaning the attorney can't touch the funds until earned) so you can feel safe in your payment. From there, keep the lines of communication open! Your attorney is in your corner and there to help. Let them know your deadlines, needs, and timelines and work together as a team.

We hope this resource helps shine a light on how to find and work with an attorney. Feel free to check out more about Trellis Legal at [www.trellispgh.com](http://www.trellispgh.com)!