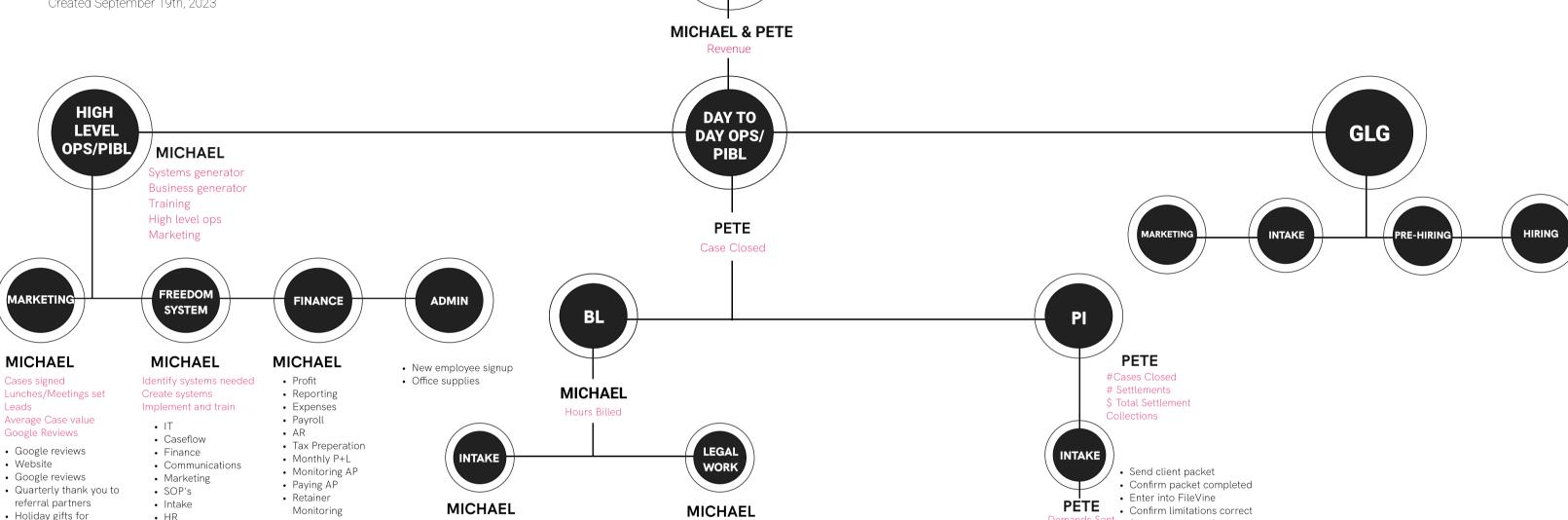
Lovins Trosclair

Accountability Chart

Created September 19th, 2023





Client gifting open/

• Birthday cards

referral partners

Referral gifting

close

- calendar
- · Community marketing calendar
- · Community marketing (person)
- · Paid ads
- Merch
- Political networking

- HR

- Set appointment
- Draft retainer
- Send retainer
- Monitor receipt of agreement + retainer

- Pleadings drafting Request service (if plaintiff)
- Confirm service complete (if plaintiff)
- · Confirm answer filed (if plaintiff)
- order
- Confirm scheduling order
- Calendar deadlines
- Respond to disclosures
- Discovery drafting
- Respond to discovery

- · Settlement release review
- Get client signature
- Monitor check collection
- Pay Advocate
- File case dismissal

If doesn't settle

- Prepare exhibit list and notebooks

STRATEGY

- Draft and submit scheduling
- Retain experts
- entered

- Schedule depositions
- Schedule mediation

If settles

- · Settlement statement

- Pay everyone
- Move firm money
- Request review

- Trial prep
- · Witness list
- · Draft jury charge
- Draft pre-trial motion

• Monthly client check-in

- Confirm treatment complete
- Records requests

PETE

· Demand draft

PRE-LIT

- Finalize and approve demand
- Send demand Negotiations
- Settle, move to Lit or refer out

If settles

- · Confirm Liens/ subrogation
- Request reductions
- Settlement statement
- · Settlement release review
- Get client signature
- · Monitor check collection
- Pay everyone
- Pay Advocate
- Move firm money
- Request review

Confirm complete meds with affidavit

Pleadings drafting

Set up treatment if necessary

Closed Cases • Send out LOR's

- Request service
- Confirm service complete Confirm answer filed
- File affidavits
- · Draft and submit scheduling order
- Retain experts
- Confirm scheduling order entered
- Calendar deadlines
- Respond to disclosures
- Discovery drafting
- Respond to discovery • Schedule depositions
- Schedule mediation

If settles

PETE

- Confirm Liens/ subrogation
- Request reductions
- Settlement statement
- Settlement release review
- Get client signature
- Monitor check collection
- Pay everyone
- Pay Advocate
- Move firm money
- Request review

• File case dismissal If doesn't settle

- Trial prep
- Prepare exhibit list and notebooks
- Witness list
- Draft jury charge
- Draft pre-trial motion