**[A blue and white sign

Description automatically generated](https://www.smartsheet.com/try-it?trp=12274&utm_source=template-word&utm_medium=content&utm_campaign=Legal+Services+Proposal-word-12274&lpa=Legal+Services+Proposal+word+12274)**

**Legal Services Proposal Template**

Proposal for

Title

**Company Logo**

Firm Name / Company

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| --- | --- | --- |
| Client Name and Information |  | Date |
|  | | MM/DD/YY |

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| --- | --- | --- |
| Firm Contact Name |  | Contact Information |
|  | | Phone, Email, Website, Office Address |

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| About Us | |
| Firm Overview | Provide a brief description of your firm, highlighting its expertise and reputation. Include key details such as the firm’s mission, areas of specialization, and a summary of its track record. You can also mention any awards or notable achievements that set your firm apart. |
| Team Expertise | Highlight key personnel and their qualifications, such as attorneys’ areas of focus, credentials, and notable cases or accomplishments relevant to the client’s needs. |

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| Client Needs Assessment | |
| Understanding of Client’s Legal Requirements | Summarize the client’s specific legal needs based on initial discussions or industry requirements (e.g., contract law, intellectual property, regulatory compliance, litigation support). |
| Objectives and Goals | Outline the legal outcomes or protections the client seeks, showing that the firm understands their priorities. |

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| Services Offered | |
| Core Legal Services: List the primary services relevant to the client, with brief descriptions for each. | |
| **Contract Drafting and Review** | Assistance with drafting, reviewing, and negotiating contracts to protect client interests. |
| **Litigation and Dispute Resolution** | Representation in court or alternative dispute resolution, including mediation and arbitration. |
| **Regulatory Compliance** | Guidance and audits to ensure compliance with industry regulations and legal standards. |
| **Intellectual Property** | Services for IP registration, protection, and enforcement. |
| **Employment Law** | Advising on workplace policies, employee rights, and dispute handling. |
| **Optional / Additional Services** | List any other services the client may require, such as M&A support, estate planning, or tax law advice. |

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| Service Levels and Scope of Work | |
| Service Levels | Define different levels of service (e.g., standard legal representation, premium advisory support, on-call consultations) with a brief description of what each includes. |
| Scope of Work | Clearly outline what is included in each service, specifying any limitations or exclusions to manage expectations. |

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| Pricing and Fee Structure | | | | |
| **Service** | **Billing Options** | **Estimated Hours/Rate** | **Cost Breakdown** | **Payment Terms** |
| Contract Drafting | Hourly Rate | 5 hours at $150/hour | $750.00 | Payment due upon completion |
| Litigation Support | Retainer Agreement | $2,000 per month | Covers up to 10 hours / month | Monthly billing; additional at $200 per hour |
| Regulatory Compliance | Flat Fee | Not Applicable | $3,500 for full compliance audit | 50% upfront and 50% upon completion |
| Intellectural Property | Contingency Fee (if applicable) | Not Applicable | Percentage of settlement (if applicable) | Payment due after case resolution |

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| Timeline and Milestones | |
| Initial Assessment and Onboarding | Explain the process for starting the engagement, including initial consultation, document gathering, and case review. |
| Key Milestones | Include expected timelines for each phase (e.g., contract review, compliance audit, trial preparation) and any critical deadlines or progress checkpoints. |
| Ongoing Support Timeline | Describe how and when the firm will provide ongoing support, such as quarterly compliance reviews or annual contract updates. |

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| Communication and Reporting Protocols | |
| Contact and Availability | Outline who the client’s primary point of contact will be and the expected response times for inquiries. |
| Regular Updates | Describe the frequency and format for progress updates (e.g., weekly check-ins, monthly reports) and how case developments will be communicated. |
| Confidentiality Assurance | Emphasize that all communications and documentation will be handled with strict confidentiality in line with legal standards. |

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| Legal Approach and Strategy | |
| Customized Legal Strategy | Provide an overview of the approach the firm will take to meet the client’s specific needs, such as negotiation, preventive measures, or aggressive representation. |
| Risk Management | Outline risk mitigation strategies, including proactive legal reviews, compliance audits, and preventive measures to protect the client’s interests. |

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| Terms and Conditions | |
| Scope of Engagement | Clearly define the services included in the engagement and any services that would incur additional fees. |
| Confidentiality and Non-Disclosure Agreement (NDA) | Include terms for protecting client information and adhering to privacy regulations. |
| Limitations of Liability | Specify limitations on the firm’s liability, disclaimers, and indemnification terms. |
| Termination of Renewal Conditions | Outline the terms for ending or renewing the agreement, including notice requirements and any penalties for early termination. |

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| Client Testimonials or Case Studies (Optional) | |
| Client Success Stories | Include brief testimonials or case studies that showcase the firm’s successful outcomes with similar clients. |
| Relevant Experience | Share examples of cases or projects in the client’s industry or area of need to demonstrate relevant expertise. |

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| Next Steps | |
| Contact for Questions | Include brief testimonials or case studies that showcase the firm’s successful outcomes with similar clients. |
| Suggested Next Steps | Recommend a timeline for proceeding (e.g., scheduling an introductory meeting within two weeks). |

Acceptance and Signature

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| Prepared By |  |  | Date |
| Name | | |  |

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| Reviewed By |  |  | Date |
| Name | | |  |

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| Client Approval |  |  | Date |
| Name | | |  |

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