

Case Preparation Checklist

Use this checklist before your consultation with Keosian Law LLP. Bringing this information helps us evaluate your claim quickly and accurately.

1. Personal & Contact Information

- Full legal name, date of birth, and current address
- Best phone number and email for confidential communication
- Government-issued photo ID
- Preferred language for communication

2. Incident Details

- Date, time, and exact location of the incident or loss
- Written description of what happened, in your own words
- Names and contact info of any witnesses
- Police, fire, or incident report numbers (if any)

3. Insurance & Policy Documents

- Declarations page of every potentially applicable policy
- Full policy wording, endorsements, and riders
- All correspondence with the insurance carrier (letters, emails, denial letters)
- Claim numbers and adjuster contact information

4. Evidence & Documentation

- Photographs and video of injuries, property damage, or the scene
- Repair estimates, invoices, and receipts for out-of-pocket expenses
- Medical records, bills, prescriptions, and provider names
- Wage-loss records: pay stubs, employer letters, tax returns

5. Prior Communications

- Recordings or transcripts of any statements given to insurers or investigators
- Notes from phone calls (date, time, person spoken to, summary)
- Any settlement offers received in writing

6. Questions to Ask Your Attorney

- What is the strongest theory of liability in my case?
- What is a realistic timeline from filing to resolution?
- What costs and fees will I be responsible for?

- Who at the firm will be my main point of contact?

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