

CHEAT SHEET: Easy Retainer® (Growth via Financing)

*This process has been designed to make it a seamless for the client as possible.
All they have to do is say yes or no to their options once the meeting with the attorney is finished*

Get primary client information

This is done on the phone. E.g. Name, address, phone number, email etc..

COMPLETE

Get secondary client information

This is done in person. The secondary information will be more in depth and will allow you to check if the client will be able to qualify for financing. This can be done on a tablet or a physical form.

COMPLETE

Submit information to check eligibility

This happens before the attorney even sees the client for their initial consultation. They may not even know that. **IMPORTANT:** Checking their eligibility does NOT pull a credit report or affect their credit in any way.

COMPLETE

Send financing result to attorney

Before the attorney even speaks to the client they will know whether or not they qualify for their basic retainer.

COMPLETE



Attorney meets with client

Once all of the legal options have been explained to the client, you can offer them the option of financing knowing whether or not they will qualify.

COMPLETE

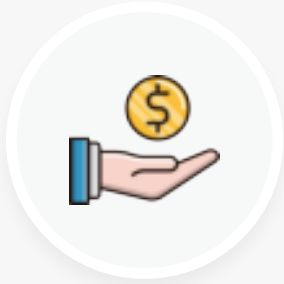


Offer financing options

Ask the client whether they would like to see the repayment options for financing the retainer. It is important to offer this to ALL clients who qualify, regardless whether or not they can pay up front. Some might prefer the monthly payments and will be happier because of it.

COMPLETE





Apply for financing

Once the client has confirmed they would like to go for financing, either let them submit the form on a tablet, or get them to do it on your computer. You already have all the information ready, so this process is quick.

COMPLETE

