

Research Plan

Date:

What: Is my assignment?

Are the facts/descriptive words?

Are the legal issues/descriptive words?

Sources are recommended (books/online/work product/human)?

Are the obvious missing important facts or information I need to ask for:

Should my work product look like?

Who: Are the parties? Which side of the lawsuit or the transaction are they on. Are ny legal entities involved?

Is the audience for my work?

Else has worked on a similar case?

Where: Is the applicable law/jurisdiction?

State? Federal? One circuit?

Other states? Choice of law issues?

When: Is it needed?

Deadlines/Priorities with other work?

Exhaustive research or quick answer? Recent case law only?
Specific result?

How: much time to you expect me to spend?

Why: Am I doing this? What are my objectives?