

Effective Screening and Onboarding Of New Appellate Clients

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**34th Annual University of Texas School of Law
Conference on State and Federal Appeals**

June 6-7, 2024

**The Otis Hotel, Austin, Texas,
and via Live Webcast.**

1

Mandatory disclaimer –

23 more days

member and panel chair of grievance committee

**Nothing said in this presentation is on behalf of any entity
whatsoever.**

**All in my sole capacity as an attorney licensed to practice law for
38+ years with no findings of professional misconduct, breach of
fiduciary duty, or legal malpractice.**

2

The 1 in 100 “new breed” of legal client.

**A win is a win, and a loss will be turned into a win
(for the client, not for you or your law firm).**

3

Grievance.

Malpractice claim.

Breach of fiduciary duty claim.

Fraud claim.

Claim of criminal conduct.

Adverse publicity.

Potential damage to professional reputation.

Potential loss of employment.

Actual or exemplary damages, or sanctions.

**Potential loss of professional liability
insurance or higher renewal premiums.**

4

All designed to exert maximum pressure on you, your law firm, or your professional liability insurance carrier, to settle, thereby turning their loss into their win and your loss.

5

How do I know that they are out there?

Entangled with one - 26th year of practice.

For 6½ years, damaged my quality of life.

2 grievances, 2 appeals, 2 dismissals, lawsuit, ugly counterclaims & affirmative defenses, death penalty sanctions, appeals, allegations of fraud and criminal conduct, finally culminating in a 12-0 jury verdict for every penny owed plus interest and costs.

6

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[First Friday Ethics \(February 2025\)](#)

First appeared as part of the conference materials for the
34th Annual Conference on State and Federal Appeals session
"Effective Screening and Onboarding of New Appellate Clients"