

Attorney Referral and New Matter Assignment

Attorney Toolbox™

Prepared by Sepi Miller, CDRE®

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DRAFT PROFESSIONAL RESOURCE - REVIEW BY PENNSYLVANIA COUNSEL BEFORE PUBLICATION OR USE

Purpose and Use

Provides the information Sepi needs to screen and open a new attorney-referred Pennsylvania matter. Estimated completion time: 5-10 minutes.

Version 1.0 | Last updated August 2026

Referring Attorney

LAW FIRM

ATTORNEY NAME

EMAIL

PHONE

ASSISTANT

PREFERRED CONTACT

Client and Case

CLIENT NAME

OPPOSING PARTY

PARTY REPRESENTED

OPPOSING COUNSEL

PENNSYLVANIA COUNTY

DOCKET NUMBER

JUDGE, IF KNOWN

NEXT COURT DATE

Property and Requested Services

PROPERTY ADDRESS**MUNICIPALITY****APPROXIMATE VALUE****MORTGAGE BALANCE****HELOC / SECOND MORTGAGE****CURRENT OCCUPANTS**

Services Requested

- | | |
|---|--|
| ☐ Neutral CDRE® consulting | ☐ Property evaluation / market analysis |
| ☐ Listing / transaction management | ☐ Buyout / equity analysis |
| ☐ Litigation support | ☐ Expert witness / report |
| ☐ Deposition / trial testimony | ☐ Property Concierge / Ready-to-Sell™ |
| ☐ Relocation / community analysis | ☐ Other |

Immediate Concerns

- | | |
|--|--|
| ☐ High conflict | ☐ PFA / safety concern |
| ☐ Refusal of access | ☐ Court-ordered sale |
| ☐ Foreclosure / delinquency | ☐ Bankruptcy |
| ☐ Property damage | ☐ Hoarding / major condition issue |
| ☐ Vacant property | ☐ Minor children / occupancy timing |

BRIEF CASE SUMMARY AND DESIRED OUTCOME

Documents and Timing

Documents Being Sent

- | | |
|---|--|
| ☐ Court order | ☐ Complaint / pleadings |
| ☐ Settlement agreement | ☐ Existing appraisal |
| ☐ Mortgage statement | ☐ Deed / title |
| ☐ Property photos | ☐ Inspection report |
| ☐ Existing listing documents | ☐ Other |

CONSULTATION NEEDED BY**REPORT / DELIVERABLE DUE****COURT / MEDIATION DATE****OTHER DEADLINE****SECURE UPLOAD REFERENCE OR FOLDER NAME**

Referring Attorney

TYPED SIGNATURE / ELECTRONIC SIGNATURE**PRINTED NAME / TITLE****DATE**

Sepi Miller, CDRE® - Matter Accepted

TYPED SIGNATURE / ELECTRONIC SIGNATURE**PRINTED NAME / TITLE****DATE**