

**SAMPLE LITIGATION BUDGET WORKSHEET (Outside counsel may use their own form)**

MATTER CAPTION: \_\_\_\_\_

CAUSE NO.: \_\_\_\_\_

Include fees, expenses, and total for each line and a subtotal for each section.

**PHASE I: Investigation and Initial Pleadings**

- Legal fees and expenses to be incurred from the date this matter is referred to Outside Counsel up to date of filing of the initial complaint or answer.
- Investigation & Analysis
- Settlement Negotiations
- Complaint/Original Petition/Answer:
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
- Other (Specify): \_\_\_\_\_

Estimated Hours for Completion: \_\_\_\_\_

**PHASE I - TOTAL \$** \_\_\_\_\_

**PHASE II: Responsive Pleadings, Motions, Discovery, Legal Fees, and Expenses (to be incurred from the date of filing of the initial complaint to the discovery cutoff date)**

- Settlement Negotiations
- Motions:
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
    - Default Judgment
    - Dismissal
    - Summary
    - Judgment
    - Other \_\_\_\_\_
- Opposition to (or) Motion to Amend Pleadings:
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
- Interrogatories/Requests for Admissions
- Response to Interrogatories/Requests
- Discovery Motions (i.e. Protective Order, Compel)
- Depositions (including witness preparation/identify deponents)
- Transcription or Other Review
- Interview/Designation of Expert Witnesses
- Court Ordered Status Conference
- Other (Specify): \_\_\_\_\_

Estimated Hours for Completion: \_\_\_\_\_

**PHASE II - TOTAL \$ \_\_\_\_\_**

**PHASE III: Pretrial/Trial Preparation. Legal fees and expenses to be incurred from the discovery cutoff date until the first day of trial.**

- Settlement Negotiations
- Docket Call
- Pretrial Motions and Replies (Specify):  
\_\_\_\_\_
- Research: \$ \_\_\_\_\_
- Drafting: \$ \_\_\_\_\_
- Argument: \$ \_\_\_\_\_
- Pretrial Conference
- Pretrial Order (including preparation of witnesses and exhibits lists)
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
- Trial Brief
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
- Preparation of Experts/Witnesses
- Jury Instructions
- Other (Specify): \_\_\_\_\_

Estimated Hours for Completion: \_\_\_\_\_

**PHASE III – TOTAL \$ \_\_\_\_\_**

**PHASE IV: Trial. Legal fees and expenses to be incurred from the date the trial commences through the entry of final judgment.**

- Settlement Negotiations
- Estimated Number of Trial Days: \_\_\_\_\_
- Trial Fees (aggregate)
  - Partners: \$ \_\_\_\_\_
  - Associates: \$ \_\_\_\_\_
  - Paralegals: \$ \_\_\_\_\_
- Expert/Witness Fees and/or Expenses
- Jury Selection
- Responses to (or) Motions for Directed/Instructed Verdict and/or Judgment Notwithstanding the Verdict:
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
  - Other (Specify): \_\_\_\_\_

Estimated Hours for Completion: \_\_\_\_\_

**PHASE IV – TOTAL \$ \_\_\_\_\_**

**PHASE V: Post-Trial. Legal fees and expenses to be incurred after the entry of final judgment, but excluding any appellate actions.**

- Settlement Negotiations
- Response to (or) Motion for New Trial
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
- Prepare Judgment or Order
- Transcript or Other Review
- Attorney Opinion Letter (whether to appeal or respond to appeal)
- Writ of Execution (preparation and filing)
- Other Execution (Specify): \_\_\_\_\_
- Post Judgment Interrogatories
- Post Judgment Depositions
- Other (Specify): \_\_\_\_\_

Estimated Hours for Completion: \_\_\_\_\_

**PHASE IV – TOTAL \$ \_\_\_\_\_**

**GRAND TOTAL OF ALL LITIGATION PHASES – TOTAL \$ \_\_\_\_\_**