

---

**BOXALL BATTLES**  
**PHASE 2 - POST INITIAL INTERVIEW**

**Questions and Instructions for Lawyer for Keith Nelson**

At the close of your initial interview with Keith Nelson, he agreed to retain you as counsel for dealings with his sister, his mother, BoxAll, and the Nelson Family Trust holdings. He agreed to pay for your time at your normal hourly rate, to be billed promptly and periodically against the \$10,000 retainer.

You can't know if your client's characterizations of his sister and mother as resentful and spiteful were exaggerated but you can certainly see his point of view. His BoxAll work has made them quite wealthy – far wealthier than in his father's time. One really can't judge another family's dynamics. It's entirely possible his sister and mother are just as difficult as he described them.

When he pressed you for strategic advice, you explained the need for a signed retention letter first, and that you wanted to think through strategic options. You said you would want to see some key documents and promised to attach a list to the retention letter.

You asked if his sister and mother had retained separate counsel, but he didn't know. He thought BoxAll's corporate counsel might know the answer to that question.

Consider the following instructions and questions:

- 1) Draft a retention letter to Mr. Nelson. Assuming you would attach it to an email as a pdf in the first instance, also draft the text of the cover email.
- 2) Create a list of the types of documents you would ask your client to gather and provide to you, if possible. This list would be attached to the client retention letter.
- 3) Assuming the documents are consistent with what Mr. Nelson told you, do you want to contact his sister's and or his mother's counsel? How would you approach this?
- 4) What are your thoughts about the Nelson matriarch? Mr. Nelson seemed to think his sister and mother might jointly retain a lawyer or that his sister would assume her lawyer's advice would cover both of them. Would that be appropriate? What are your concerns about your client's mother and how should you address them?

Of course, your initial strategic advice to your client will depend on documents provided and on what you learn from initial contact with the attorney(s) on the other side.

Nevertheless, you anticipate that as soon as Mr. Nelson signs and returns the retention letter, he will press you about: *What are we going to DO? How can we stop my sister from making trouble by creating more conflict, making ridiculous accusations, and asserting control in a way that could harm BoxAll?*

What are your thoughts about next steps? What's the best way to communicate them to your client?