

Upgrade Program Legal Plan

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Introduction

This document is part of a series of upgrade plans for every [area](#) of your life. It's broadly designed for a single, middle-class, 30-something living in a major city in a developed country.

Actually understanding and complying with the law is surprisingly difficult. This should not be considered legal advice. We strongly recommend you seek appropriate legal counsel.

Please go to "File" > "Make a copy" and make a copy of it for yourself. Then fill it out section by section according to your particular needs and circumstances. Perhaps add sections or items, delete them, change the order, and so on.

Your aim should be to make the plan as applicable and useful to you as possible. You should not follow the plan blindly—think it through for yourself.

Note that this process might be challenging. You might need to teach yourself things you aren't very knowledgeable about yet. You might feel like you need to do preliminary work in a different life area first. That's okay. Figure out broadly what makes sense for you, operationalize that understanding as specific actions in the [Actions](#) section, and then do them.

If it feels overwhelming, just start with the parts you find most valuable and do what you can. Tackle the rest over time. It may also help to set aside a dedicated [day](#) to work exclusively on this by yourself or with friends. Or you may choose to enlist an [UP Coach](#) to co-design and execute this plan alongside you.

Epistemic Status

This is an overview of how confident the principal [author](#) is in this plan.

- Generally very low confidence in plan

Objectives

Decide what objectives you have with this plan and rank them in order of importance. Below are some sample objectives.

1. Ensure compliance with applicable laws for your personal and professional life
2. Mitigate legal risks
3. Understand and know your constitutional rights

Metrics

Decide what metrics you will use to evaluate the effectiveness of this plan. Also include the frequency in which you'll evaluate those metrics. For example, ad hoc, once, hourly, daily, weekly, monthly, quarterly, annually or per decade. Below are some sample metrics.

- Legal Rating: How would you rate your legal compliance, on a 1-10 scale?
- Annual Legal Expenses

Values

List all of your relevant values and rank them in order of importance. Below are some sample values.

1. Law
2. Risk
3. Safety
4. Citizenship

Value Analysis

List and then analyze all of the costs and benefits of this plan. Potentially also estimate expected value, cost-benefit, return on investment, and/or net present value.

- Time costs: 1 - 200 hours
- Financial costs: \$0 - \$5,000 dollars (e.g., lawyers, courses, books, etc.)
- Benefits: \$X in potentially extremely large objective or subjective benefits

Strategies

Decide on your high-level strategies for achieving your objectives. Below are some sample strategies.

Key People

- Do the work on your own
- Outsource some or most of the work to experts (e.g., lawyers, etc.)
- Outsource some or most of the work to assistants

Key Timings

- Do the initial work as soon as you can
- Do the initial and review work on an annual basis (e.g., every January)

Actions

List the specific actions you will take to achieve your objectives. You should add these tasks to your project management system unless you are choosing to do them now. Below is an example sequence of actions you might take.

1. Describe your [mental model](#) of the law
 - a. Create a visual representation from memory without referencing this plan or outside sources of information
 - b. Create a new visual representation after thoroughly studying this plan and any relevant sources of information
 - c. Pay special attention to the improvements in the second version as incorporating those new insights may be crucial to the success of your plan
2. Finish every section of this plan, including the [assessments](#), [tools](#), and [resources](#) below
3. Make a list of any pressing legal needs you may have
4. Begin educating yourself
 - a. Research the laws of your jurisdiction online
 - b. Call a legal hotline
 - c. Look for open source legal templates (e.g., [LawDepot](#))
 - d. Search for law school pro bono programs
 - e. Investigate public and non-profit legal assistance programs
5. Choose a personal attorney or firm
 - a. Determine the best type of attorney for your individual needs
 - b. Consider established firms (e.g., [Baker McKenzie](#) or [Kirkland](#)) and smaller firms
 - c. Get referrals and recommendations from friends, family, and colleagues
 - d. Screen for bad practices
 - i. Research common scams and cheats
 - ii. Generally do not hire an attorney who has solicited you
 - iii. Ask for the attorney's background and credentials
 - iv. Check for unethical practices or scandals
 - e. Select your personal attorney
6. Work with the personal attorney to determine what you need to do, then do it
7. Review on at least an annual basis to ensure you stay compliant with applicable laws

Schedule

Decide on which days you will take which actions. You should add these dates to your calendar now.

- [Date]: Finalize plan
- [Dates]: Execute plan
- [Dates]: Review plan's outcomes

Predictions

Predict how well you will do in achieving your objectives.

- [Name]: I predict with [X]% confidence that I will [Y] by [Z].
- [Team Member's Name]: I predict with [X]% confidence that [Name] will [Y] by [Z].
- [Team Member's Name]: I predict with [X]% confidence that [Name] will [Y] by [Z].

- Combined: We predict with an average [X]% confidence that [Name] will [Y] by [Z].

Outcomes

Objectively record how well you achieved your objectives.

- [Date #1]: [Outcomes]
- [Date #2]: [Outcomes]
- [Date #3]: [Outcomes]
- [Date #4]: [Outcomes]
- [Date #5]: [Outcomes]
- [Date #6]: [Outcomes]
- [Date #7]: [Outcomes]
- [Date #8]: [Outcomes]
- [Date #9]: [Outcomes]
- [Date #10]: [Outcomes]

Assessments

List all of the assessments you might take to understand how you're doing compared to your objectives. Below is a sample assessment.

- [United States Civics Test](#): an examination that all immigrants must pass to gain United States citizenship, containing 100 civics questions that cover various topics in U.S. history, constitution, and government

Tools

List all of the tools you might use to achieve your objectives. Below are some sample tools.

- [Advance directive](#)
- [Baker McKenzie](#)
- [Clifford Chance](#)
- [Dentons](#)
- [DLA Piper](#)
- [Hagens Berman](#)
- [Henley & Partners](#)
- [Hogan Lovells](#)
- [Kirkland](#)
- [Latham & Watkins](#)
- [LawDepot](#)
- [LegalMatch](#)
- [Morgan Lewis](#)
- [Rocket Lawyer](#)
- [Sidley](#)
- [Skadden](#)
- [UP Actions](#)
- [UP Assessments](#)
- [UP Curriculum](#)
- [UP Tools](#)
- [The Plain Contract](#)
- [White & Case](#)

Resources

List all of the resources you might use to achieve your objectives.

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Notes

Add any random thoughts, questions, and uncertainties you may have.

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Legal

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