LAWYER REFERRAL

CLIENT INTAKE QUESTIONNAIRE

**Personal Information:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Last Name, First Name, Middle Name*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Home Address Apt No.*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*City, Town or Village, Province, Postal Code*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Telephone No.*

*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Email Address*

**Case Information**

1. Existing Litigation

Have court proceedings commenced?

If yes, please provide the following information 1-6 below.

If no, please go to Part (B)

1. Court File #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Name and address of the opposing party

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Name, address, email and telephone number of the lawyer for

the opposing party, if any.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Name and location of the court for this case

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1. Please attach copies of the court papers (eg. Statement of Claim, Statement of defence etc.)
2. Please describe the procedural history of your litigation, ie. Check with an “X” beside each step that has taken place, and give the date when these occurred.

|  |  |
| --- | --- |
| PROCEDURAL STEP | DATE |
| Pleadings |  |
| Case Conference (Family Law) |  |
| Discovery/Questioning |  |
| Undertakings to Discovery answered satisfied? |  |
| Motions (give details) |  |
| Pre-trial conference |  |
| Settlement meetings/Offer to Settle |  |
| Any interim Orders or Endorsements (attach a copy of any Order or Endorsement from the judge/master to date). |  |

1. Factual background
2. For all potential clients, please describe, up to 500 words, the incident giving rise to the litigation/dispute. Please write down the remedy you are seeking, eg. money compensation. Please enter the information directly here, or attach a separate Word document or PDF if you like.

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1. Please describe the type of legal services you are seeking. (E.g. Drafting legal documents, legal research, advice on strategy, coaching on court procedures, representation at a hearing, etc.)

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