

ADVICE AND SETTLEMENT COUNSEL PROJECT
CLIENT AND APPEARANCE INFORMATION – PAGE ONE
TO BE COMPLETED BY CLIENT AND PROVIDED TO LAWYER

Today's Date: _____

First Name: _____ Last Name: _____ Middle Initial: _____

Do you use/are known by another name? No Yes If yes, what is the name? _____

Street Address: _____ Apt #: _____

City: _____ Province: _____ Postal Code: _____

Phone Number: _____ Email: _____ Birthdate: ____ / ____ / ____
(Area Code) (Telephone Number) DD MM YYYY

Gender: Female Male Other Prefer Not to Answer

Employment: Full-Time Part-Time Unemployed Student Retired Other: _____

Annual Income: \$ _____ Prefer Not to Answer

I am the Applicant/Moving Party Respondent in this matter.

Issue(s) I want help with today:

<input type="checkbox"/> Custody/Access/Parenting Arrangements	<input type="checkbox"/> Property Division
<input type="checkbox"/> Child Support	<input type="checkbox"/> Exclusive Possession of Matrimonial Home
<input type="checkbox"/> Spousal Support	<input type="checkbox"/> Court Costs
<input type="checkbox"/> Restraining Order	<input type="checkbox"/> Other: _____

Other Parties:

Name: _____ Relationship to me: _____
(e.g., Ex-Husband or Wife, Father or Mother of Child)

Name: _____ Relationship to me: _____
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Name: _____ Relationship to me: _____
(e.g., Ex-Husband or Wife, Father or Mother of Child)

Family Responsibility Office Name of Lawyer: _____

Office of the Children's Lawyer Name of Lawyer: _____

Other: _____

I am willing to be interviewed about the lawyer assistance I received today: Yes No

If Yes, may a researcher contact you at the phone number or email provided above for information about your experiences with summary legal counsel? Yes No

Other contact info: _____

CLIENT AND APPEARANCE INFORMATION – PAGE TWO
TO BE COMPLETED BY LAWYER, COPY TO BE PROVIDED TO CLIENT

- I have completed a preliminary Conflicts Check.
- I have verified the identity of the client.
- The client has executed an Acknowledgement and Agreement for Limited Advice Services.
- The client has signed the Information and Consent for Participants (copy attached) (Dr. Birnbaum research) OR
- The client signed and submitted an Information and Consent Form for Participants at an earlier appearance.
- I have signed the Information and Consent for Family Lawyer (copy attached) (Dr. Birnbaum research) OR
- I have already submitted an Information and Consent for Family Lawyer.

Type of Proceeding: Divorce with Claims for Corollary Relief Application under FLA/CLRA
 Motion to Change Support Enforcement Appeal Other: _____

Assistance provided to client:

Outcome:

<input type="checkbox"/> Procedural Information	
<input type="checkbox"/> Limited Legal Advice	
<input type="checkbox"/> Attendance in Court	
<input type="checkbox"/> Assistance with Negotiations	
<input type="checkbox"/> Drafting or Reviewing Draft Consent/Minutes of Settlement	

Client was advised of the following required or recommended next steps:

1. _____
2. _____
3. _____
4. _____
5. _____

Additional Notes and Comments (add page if required):

# of hours of service:	Name of Judge/DRO: