



**PLEASE NOTE:**

→ TO BE COMPLETED IN THE LAWYER'S PRESENCE

Name : \_\_\_\_\_ File no.: \_\_\_\_\_

1. Have you previously had any experience in a court?  Yes  No
2. On a scale of 1 to 10 (*0 = no confidence, 10 = absolute confidence*), what is your level of confidence in courts? \_\_\_\_\_ /10
3. Has a lawyer already been consulted about this matter?  Yes  No  
If so, do you give me authorization to contact that lawyer?  Yes  No
4. What is the main issue in your case?  Financial (how much? \$ \_\_\_\_\_)  A matter of principle  
 Relationship issue  Legal issue  Other: \_\_\_\_\_
5. How would you evaluate the stress caused by this case?  Extreme  Great  Normal  Low  None
6. How would you evaluate the risks associated with this case?  Extreme  Great  Normal  Low  None
7. Do you have access to legal or other information sources (*Internet, association, etc.*)?  Yes  No  
If so, what are these sources? \_\_\_\_\_
8. How much can you invest in this (*including expert witness fees and other costs*)? \$ \_\_\_\_\_
9. What methods of payment are you comfortable with? \_\_\_\_\_
10. Within how much time would you like to achieve results? \_\_\_\_\_
11. How much time do you have to act before taking legal proceedings or responding to a demand (*prescription*)?  
\_\_\_\_\_
12. Did you know that the *Code of Civil Procedure* provides that people facing a dispute of a legal nature must consider private prevention and resolution processes before turning to the courts?  
 Yes  No  Explanations received
13. Do you know that your lawyer can settle your case in a different way, other than by going before a court?  
 Yes  No
14. Would you be willing to consider an out-of-court settlement?  Yes  No

15. How would you rate your knowledge of the following subjects:

- The steps and procedures of a lawsuit?  Good  Average  Poor →  Explanations received
- The timeframe and costs of a lawsuit?  Good  Average  Poor →  Explanations received
- The dispute prevention and resolution processes?  
For example: mediation, negotiation  Good  Average  Poor →  Explanations received
- The terms and conditions of enforcing a judgment?  Good  Average  Poor →  Explanations received

16. Once you have well understood the options available to you, rank—in order of interest (1-2-3-4-5)—the following approaches that may be applicable to your case:

- Mediation  Negotiation  Arbitration  Lawsuit  Other means of settlement

17. Over and above the issue at hand, what would you ideally like to obtain in this case?

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18. What is the importance to you for this matter to remain confidential (i.e., that it not be made public)?

- Necessary  Preferable  Not very important

19. Have your client initial:

I am the person authorized to make decisions about this matter \_\_\_\_\_

If not, who can do so? \_\_\_\_\_

I am satisfied with the information and explanations received \_\_\_\_\_

I have understood the information provided on:

■ the types of solutions available to me, depending on the chosen approaches \_\_\_\_\_

■ the timeframe and costs associated with each of the suggested approaches \_\_\_\_\_

■ the next steps \_\_\_\_\_

■ the confidential or non-confidential nature of each approach suggested \_\_\_\_\_

20. Would you like to obtain more information?  Yes  No

If yes, on what subject: \_\_\_\_\_

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Signed in \_\_\_\_\_ (municipality and province), on \_\_\_\_\_ (date)

\_\_\_\_\_  
(client's signature)

\_\_\_\_\_  
(lawyer's signature)