



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. Do you have access to legal or other information sources (*Internet, association, etc.*)? Yes No
If so, what are these sources? _____
7. How much can you invest in this (*including expert witness fees and other costs*)? \$ _____
8. What methods of payment are you comfortable with? _____
9. Do you have any legal fees insurance? Yes No I don't know
If yes, does the insurance cover the situation about which you are coming for a consultation? _____
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?

18. Have your client initial:

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 _____

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

If yes, on what subject: _____

Signed in _____ (municipality and province), on _____ (date)

(client's signature)

(lawyer's signature)