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| **CLIENT NAME:** **Authority/Corporate Officer:****Other Party/Parties:** | **ADDRESS:** | **File Opening** |
| **FILE #:** | **EMAIL:** | Conflicts Checked  |
| **COURT FILE #:** | **PHONE:** | Retainer Letter  |
| **OPPOSITE COUNSEL/PARTY:** | Client ID Client Verification  |
| **ISSUE:** |
| **KEY DATES/DEADLINES/NEXT STEPS:** | Date:Summary: |

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| **Key Instructions and Communications** |
| Client  | Date:Summary: |
| Opposite Counsel/Party | Date:Summary: |
| Experts (financial, medical, engineering, etc.) | Date:Summary: |
| Others (employees, consultants, witnesses, etc.) | Date:Summary: |

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| **Key Information**   |
| Preliminary Matters |  |
| Pre-Action Considerations |  |
| Commencement of Action* Statement of Claim/Originating Application
 | Date:Summary: |
| Defending Action* Statement of Defence/Demand for Notice/Dispute Note
 | Date:Summary: |
| Third Party Claims/Counterclaims/Crossclaims | Date:Summary: |
| Procedural Orders | Date:Summary: |
| Production* Affidavit of Records/Interrogatories/Exchange of Documents
* Compelling Production
 | Date:Summary:Date:Summary: |
| Questioning* Compelling Attendance
* Responses/Undertakings
* Conduct Money
 | Date:Summary:Date:Summary:Date:Summary: |
| Experts, Experts Report, Rebuttal, etc. | Date:Summary: |
| Negotiation and Settlement* Formal Offer/Calderbank Offer/Costs
 | Date:Summary: |
| Alternative Dispute Resolution (ADR) | Date:Summary: |
| Trial Preparations/Procedure | Date:Summary: |
| Admissions/Notice to Admit  | Date:Summary: |
| Witnesses | Date:Summary: |
| Trial | Date:Summary: |
| Post-Trial Procedures | Date:Summary: |
| Pre-Judgement Remedies | Date:Summary: |
| Post-Judgement Enforcement* Caution given to client
 | Date:Summary: |

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| **Key Documents Notes** |
| Agreement(s) |  |
| Prior Orders/Decisions |  |
| Liens, Encumbrances, Obligations |  |
| Other  |  |