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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 |  |