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| **CLIENT NAME:** **(Co-Accused):** | **ADDRESS:** | **File Opening** |
| **FILE #/LEGAL AID CERTIFICATE:** | **EMAIL:** |  Conflicts Checked |
| **COURT FILE #/INFORMATION #:** | **PHONE:** | Retainer Letter  |
| **CROWN COUNSEL:**  | Client ID Verification  |
| **CHARGES:** |
| **KEY DATES/DEADLINES/NEXT STEPS:** | Date:Summary: |

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| **Key Instructions and Communications** |
| Election/Plea(*Section 606, if applicable, etc.*) |  |
| Client  |  Date:Summary: |
| Crown | Date:Summary:  |
| Witnesses  | Date:Summary:  |

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| **Key Information**  (Date) |
| Charges |  |
| First Appearance |  |
| Designation of Counsel Filed with Court |  |
| Disclosure Requested |  |
| Disclosure Received/Complete |  |
| Disclosure Reviewed |  |
| Crown Election |  |
| Preliminary Inquiry  |  |
| Pre-Trial Motions – Application Filing Deadline |  |
| Pre-Trial Motions – Supporting Materials Filing Deadline |  |
| Pre-Trial Conference |  |
| Trial |  |
| Sentencing  |  |
| * Pre-Sentencing Report
 | Date:Summary:  |
| * Gladue/Colonial Impact Report
 | Date:Summary:  |
|  |  |
| * Psychiatric/Psychological
 | Date:Summary:  |

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| **Legal Aid Considerations** |
| Initial Tariff | Date:Summary: |
| Additional Request, if required | Date:Summary: |
| Legal Aid Authorization for Special Disbursements (e.g., Expert) | Date:Summary: |
| Hours Tracking Up to Date, if required | Date:Summary: |