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| **CLIENT NAME:**  **(Other Party):** | **ADDRESS:** | **File Opening** |
| **FILE #/LEGAL AID CERTIFICATE:** | **EMAIL (safe to contact):** | Client ID  Client Verification |
| **COURT FILE #:** | **PHONE (safe to contact):** | Conflicts Checked |
| **OPPOSITE COUNSEL/PARTY:** | | Client Occupation/Employer |
| **ISSUES:** | | Retainer Letter |
| **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, parenting, etc., as applicable) | Date:  Summary: |
| Others (counsel for the child, grandparents, [third party payor,](https://documents.lawsociety.ab.ca/wp-content/uploads/2017/01/04144612/Rules.pdf) etc., as applicable) | Date:  Summary: |

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| **Key Information** | |
| Parties’ Names and Dates of Birth |  |
| Date Of Marriage/Cohabitation/Separation |  |
| Child(ren)’s Date(s) of Birth |  |
| Prior Order(s)/Agreement(s) | Date:  Summary: |
| Trust Conditions/Undertakings | Date:  Summary: |
| Financial Disclosure Requested | Date:  Summary: |
| Financial Disclosure Received | Date:  Summary: |
| Child Support/Arrears (DRO/MEP) | Date:  Summary: |
| Spousal/AIP Support/Arrears | Date:  Summary: |
| Key Concerns (violence, exclusive possession, etc.) | Date:  Summary: |
| Confidential Client Concerns (client dating someone new, etc.) | Date:  Summary: |
| Advise client to enrol in Parenting After Separation Course | Date:  Summary: |
| Interim Applications | Date:  Summary: |
| Court Assisted Resolution | Date:  Summary: |
| Alternative Dispute Resolution (ADR) | Date:  Summary: |
| Family Special | Date:  Summary: |
| Trial | Date:  Summary: |

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| **Key Documents Received/Filed** | |
| Marriage certificate |  |
| Picture of Partner |  |
| Prior Orders/Decisions | Date:  Summary: |
| Financial Disclosure Requested (if update needed) | Date:  Summary: |
| Financial Disclosure Received | Date:  Summary: |
| File Notice to Disclose Application (if required) | Date:  Summary: |
| Child Support/Arrears | Date:  Summary: |
| Spousal/AIP Support | Date:  Summary: |
| Parenting After Separation Course Certificate | Date:  Summary: |

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