

## Appendix A

### Scope of Services to be Provided

[Complete either this section of the Appendix or the chart below]

The specific services that we have agreed that I will provide are as follows:


- or -

Indicate Yes or No in every box:

1.		Procedural advice
2.		Advice on substantive rights and obligations
3.		Advice about law and strategy related to your ongoing matter
4.		Formulate strategy and tactics, to the extent specifically agreed upon
5.		Legal research and analysis
6.		Communications with opposing counsel
7.		Assist with drafting correspondence
8.		Draft correspondence
9.		Assist with document preparation
10.		Information about fact gathering, discovery or questioning
11.		Assist with fact gathering, drafting discovery or questioning requests
12.		Investigate facts
13.		Assist with computer support calculations
14.		Run computer support calculations
15.		Review court documents
16.		Review transcripts
17.		Review documents obtained from others
18.		Coach you for negotiations and discuss negotiation strategy

19.		Negotiate a settlement, to the extent specifically agreed upon
20.		Assist with drafting a Case Conference Brief
21.		Draft a Case Conference Brief
22.		Assist with drafting a Settlement Conference Brief
23.		Draft a Settlement Conference Brief
24.		Assist with drafting a Trial Scheduling Endorsement Form and/or Trial Management Conference Brief
25.		Draft a Trial Scheduling Endorsement Form and/or Trial Management Conference Brief.
26.		Assist with your Financial Statement form and disclosure.
27.		Prepare your Financial Statement form and disclosure.
28.		Serve and file your Financial Statement form and disclosure.
29.		<p>Assist with drafting the following court forms as indicated:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Application</li> <li><input type="checkbox"/> Answer</li> <li><input type="checkbox"/> Reply</li> <li><input type="checkbox"/> Notices of Motion</li> <li><input type="checkbox"/> Affidavit(s)</li> <li><input type="checkbox"/> Affidavit of Documents</li> <li><input type="checkbox"/> Request(s) to Admit</li> <li><input type="checkbox"/> Answer(s) to Request(s) to Admit</li> <li><input type="checkbox"/> Factum(s)</li> <li><input type="checkbox"/> Certificate of Disclosure</li> <li><input type="checkbox"/> Net Family Property Statement</li> <li><input type="checkbox"/> Offer(s) to Settle</li> <li><input type="checkbox"/> Appeals</li> </ul>
30.		<p>Draft the following court forms as indicated:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Application</li> </ul>

		<input type="checkbox"/> Answer <input type="checkbox"/> Reply <input type="checkbox"/> Notices of Motion <input type="checkbox"/> Affidavit(s) <input type="checkbox"/> Affidavit of Documents <input type="checkbox"/> Request(s) to Admit <input type="checkbox"/> Answer(s) to Request(s) to Admit <input type="checkbox"/> Factum(s) <input type="checkbox"/> Certificate of Disclosure <input type="checkbox"/> Net Family Property Statement <input type="checkbox"/> Offer(s) to Settle <input type="checkbox"/> Appeals
31.		Draft Requests for Information or Responses to Requests for Information
32.		Draft settlement proposals
33.		Analyze settlement options, offers to settle/settlement proposals
34.		Draft Minutes of Settlement
35.		Draft Separation Agreement
36.		Review Endorsements and Draft Orders
37.		Enforce Orders. Specify how: _____
38.		Prepare summons to Witness
39.		Coach you for court attendances (motions, conferences or trial) you attend on your own
40.		Advice about the preparation and presentation of evidence, to the extent specifically agreed upon
41.		Coach you for mediation or arbitration that you attend on your own and discuss mediation or arbitration strategy
42.		Assist with drafting a Mediation Brief
43.		Draft a Mediation Brief
44.		Prepare you for a section 30 custody and access assessment under the

		<i>Children's Law Reform Act</i>
45.		Prepare you for involvement with the Office of the Children's Lawyer
46.		Coach you on trial procedures and trial preparation
47.		Coach you on negotiation techniques and strategies
48.		Prepare you to be questioned and to question the other party
49.		Question the opposite party
50.		Liaise with and instruct expert witnesses
51.		Arrange for expert report(s)
52.		Advice, guidance and procedural information regarding filing and serving documents
53.		File and serve court forms
54.		Advice about an appeal or the appeal process
55.		Procedural assistance with an appeal
56.		Appear in court (only for specific attendances as agreed upon in advance)
57.		Other (specify): _____