**Retainer letter/agreement #1: One-time limited consultation**

**[Assumes payment made in full at time of consultation]**

**Your Firm Letterhead**

**[Date]**

**[Name and Address]**

**Dear [Name]:**

**Re: Limited Scope Retainer Agreement**

Thank you for the opportunity to provide legal services for you on a one-time limited scope basis with respect only to **[describe the family matters involved]**. This letter describes the terms and limits of our engagement which involved a **[telephone meeting / in person meeting]** on **[date].**

**Scope of Services**

Before or during our meeting I provided you with the following services:

**[Set out a complete list of the services you provided. It is important to be explicit]**

* Consultation session(s) for up to [X] hours
* Review of documents you provided
* Discussion of process options available to you
* Advice regarding your rights and responsibilities
* Advice about the law and strategy relevant to the issues you identified
* Advice about negotiation and preparation/presentation of evidence
* …
* Other (specify)

You have not retained me and I do not represent you generally or in connection with any other matter. I will NOT be providing the following services:

**[In order to avoid any misunderstanding, provide a list of any specific services that you are not providing. As an example, the list might include some of the following:]**

* Representing you at any mediation session or court hearing
* Entering an appearance in any court action or becoming lawyer of record. You agree to remain the party of record and you are fully responsible for meeting court deadlines
* Accepting service on your behalf of any court documents
* Preparing documents for court or otherwise
* Other (specify)

All of the services have been completed and no further services are requested or expected. You are in control over all aspects of your matter and are responsible for all decisions made.

If you request me to provide additional services and I agree to do so, then we must enter into a separate written and signed agreement which describes the new scope of limited service.

**Cost and Billing**

My fee for this one-time consultation is **[either a flat fee of $X or an hourly rate of $XX. If hourly rate, set out the time spent X hourly rate for a total amount]** plus applicable tax (GST 5% and PST 7%). I am attaching an invoice for **$X**. You agreed to pay this amount in full at the beginning of our meeting or in advance if we did not meet in person. **[describe the acceptable forms of payment]**.

I confirm that the invoice amount has been paid in full.

**No Guarantees**

Although I may offer an opinion about your case or about possible results of a court hearing relating to this matter, I cannot guarantee any particular result. You acknowledge that I have made no promises about the outcome and that any opinion offered does not constitute a guarantee.

**Additional Specialized Advice**

**[Describe any issues that may need specialized advice (examples: tax; financial; estate planning), explain that you will not be providing advice on these issues and recommend that the client consult another professional for advice as applicable.]**

You acknowledge that I advised you of your right to seek separate legal advice from another lawyer of your choice with regard to this matter.

**Limitation Periods**

Based on what you advised me [or the nature of your matter], the following limitation periods may apply to your matter:

1. **[List]**

You are entirely responsible for meeting these and any other time limitations.

This letter **[and attachments, if any]** comprise the entire agreement between us. Any changes must be recorded in writing and signed by both parties.

If you are satisfied with the terms of this letter agreement please sign below.

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**LAWYER**  Date

**I have carefully read this Agreement and I understand and agree with all of the provisions.**

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CLIENT Date