**SCHEDULE A – Example Template**

**Scope of Services**

**Example: Drafting documents for court hearing**

**[Categories are examples only – tailor the list to meet the unique needs of this retainer and discuss each item on the list with the client]**

I will provide the services relating to your family matter (as described above) marked with a **“yes”** in the table below. I will NOT perform those services marked with a **“no”**:

**My services relate ONLY to drafting documents (namely an affidavit and a written submission) for you to use at your Provincial Court hearing relating to parenting arrangements scheduled for [date].**

**(Indicate *Yes* or *No* in box)**

|  |  |  |
| --- | --- | --- |
|  |  | Advice on substantive rights and obligations related to the hearing |
|  |  | Advice about law and strategy related to the hearing |
|  |  | Advice on other alternative resolution processes |
|  |  | Advice on limitation periods and other time deadlines relevant to this matter |
|  |  | Communications with opposing counsel (on matters within scope) |
|  |  | Review correspondence |
|  |  | Draft correspondence |
|  |  | Provide information about document preparation |
|  |  | Consultation with you to obtain information relevant to the affidavit |
|  |  | Investigate facts |
|  |  | Preparing draft affidavit and discussing it with you |
|  |  | Preparing final version of affidavit |
|  |  | Meeting with you to execute the affidavit |
|  |  | Preparing the application record and advising you about it |
|  |  | Researching the law relating to the hearing issues |
|  |  | Reviewing court documents |
|  |  | Reviewing affidavits, submissions from the other party or witnesses |
|  |  | Gathering relevant caselaw and discussing with you |
|  |  | Preparing draft written submission and discussing it with you |
|  |  | Preparing final version of submission |
|  |  | Preparation of hearing submissions brief |
|  |  | Advice about hearing process, preparation and presentation of evidence and arguments at the hearing |
|  |  | Coaching on presentation of submissions at the hearing |
|  |  | Guidance and procedural information regarding filing and serving documents |
|  |  | Other: see below |

**Limitation of Lawyer’s Responsibilities**

In addition to those services marked with the word “no” in Schedule “A”, in order to avoid any misunderstanding, add to the table above any services you will NOT provide which are not already specifically included in the list above. Ensure each is discussed with the client and a “no” is noted beside each one. For this example, these might include:

* Enter an appearance in any court action or become lawyer of record. You remain the party of record and you are fully responsible for meeting court deadlines.
* Represent, speak for, appear for, or sign papers on your behalf.
* Represent, speak for, or appear on your behalf at any Court attendance.
* Accept service on your behalf of any court documents.
* Take any steps to prepare your case for trial.
* Protect your property by means of restraining orders while discovery, negotiations, mediation or litigation are in progress.
* Other: specify

**[If needed add] Other activities and notes:**

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**I have carefully read this Schedule A and I understand and agree with all of its provisions:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Lawyer Date**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Client Date**