

## Civil Matter Consultation Package

A simple guide to help us understand your situation and advise you clearly.

|                                 |  |
|---------------------------------|--|
| <b>Your name</b>                |  |
| <b>Phone</b>                    |  |
| <b>Email</b>                    |  |
| <b>Preferred contact method</b> |  |
| <b>Best time to contact you</b> |  |

### Before You Start

You do not need to have everything figured out before speaking with us. Partial information is completely fine. If you are unsure about something, leave it blank or write “not sure.” This package simply helps us understand your matter faster and give you better advice.

### What This Package Helps Us Do

- Understand who is involved and complete our conflict check.
- See the basic timeline of what happened.
- Understand what outcome you are hoping for.
- Identify documents, witnesses, risks, and practical next steps.

### How to Complete This Package

Use plain language. You do not need to use legal terms. The most useful information is usually simple: who was involved, what happened, when it happened, what documents exist, and what you want to happen next.

### A Few Helpful Guidelines

- Best guesses are acceptable. Approximate dates are better than no dates.
- Do not worry about perfect organization. We can help refine the details later.
- Include facts even if they seem unhelpful. It is better that we know about them early.
- Bring or send documents that may relate to the matter, even if you are unsure whether they matter.

### Important Note

Completing this package does not create a lawyer-client relationship and does not mean Hayes Fry Law has agreed to act for you. A lawyer-client relationship begins only after we complete our intake process, confirm we can act, and enter into a written retainer agreement.

### Confidentiality and Conflicts

We ask for names and basic details so we can check whether we have a conflict of interest. Please avoid sending highly sensitive documents until our office confirms the best way to provide them.

# 1. Who Was Involved

Please list anyone connected to the situation. This may include people directly involved, witnesses, businesses, organizations, insurers, contractors, employees, supervisors, or anyone else who may have relevant information. If you do not know a name, use a description such as “manager at ABC Company.”

| Name or Description | Contact Information | Their Role/How They Are Involved |
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Why this helps: a complete list helps us check for conflicts, identify witnesses, and understand where useful evidence may come from.

## 2. What Happened? Timeline of Events

Tell us the story step by step. It does not need to be perfect. Include dates, times, locations, and short descriptions where possible. If you only know an approximate date, write something like “early March 2026” or “about two weeks before the meeting.”

| Date | Time | Location | What Happened |
|------|------|----------|---------------|
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Even a rough timeline is useful. We can help organize the details during your consultation.

### 3. What Outcome Are You Hoping For?

Different clients want different outcomes. Some want compensation, some want the problem fixed, some want accountability, and some simply want practical closure. Check anything that applies. There is no “right” answer.

| Outcome                                                               | Check                    | Details / Amount / Notes |
|-----------------------------------------------------------------------|--------------------------|--------------------------|
| I want to be compensated for money I lost.                            | <input type="checkbox"/> |                          |
| I want compensation for harm, stress, inconvenience, or loss of time. | <input type="checkbox"/> |                          |
| I want the other party to stop doing something or fix something.      | <input type="checkbox"/> |                          |
| I want accountability or acknowledgement.                             | <input type="checkbox"/> |                          |
| I want my legal costs recovered if possible.                          | <input type="checkbox"/> |                          |
| I want closure and the most practical path forward.                   | <input type="checkbox"/> |                          |
| Other:                                                                | <input type="checkbox"/> |                          |

#### What Matters Most to You?

|                                                                                                             |                                                                                                                                                                                |
|-------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Speed<br><input type="checkbox"/> Cost Control<br><input type="checkbox"/> Privacy | <input type="checkbox"/> Principle / Accountability<br><input type="checkbox"/> Avoiding court if possible<br><input type="checkbox"/> Being prepared to litigate if necessary |
|-------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## 4. Documents and Evidence

Documents often make a major difference in civil matters. Please list or attach anything that may relate to the dispute. It is fine if you are unsure whether a document matters.

### Common Examples

- Contracts, invoices, receipts, estimates, letters, emails, texts, screenshots, photographs, videos, voicemails, notices, insurance documents, corporate records, repair records, medical records, or police / bylaw / government documents.
- Names of people who may have documents or information.
- Any previous demand letters, settlement offers, court documents, or deadlines.

| Document / Evidence | Who Has It? | Why It May Matter |
|---------------------|-------------|-------------------|
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## 5. What Happens Next?

Once we receive your information, our goal is to give you clear, practical advice about your options, risks, likely costs, and next steps.

1

- We review the basic facts, parties, documents, and any urgent deadlines.

2

- We identify legal issues, practical options, and possible risks.

3

- We discuss strategy, cost-effective steps, and whether litigation is necessary or avoidable.

4

- If you decide to move forward, we complete the retainer process and guide you through the next stage.

### Our Approach

Clear advice in plain language.

A practical focus on your goals, risks, costs, and likely outcomes.

A preference for cost-effective resolution where possible, with litigation experience when court becomes necessary.

### Next Step

Please return this package to [reception@hayesfrylaw.ca](mailto:reception@hayesfrylaw.ca) or bring it with you to your consultation. If you have questions about what to include, contact our office and we will help you get started.