

File Note

Matter number	Author
Matter name	Location
Client	Time
Date	Units
With	Phone number

Attendance Physical attendance Court attendance Phone In/Out Other

Ask Why? – Test the client's objectives and expectations
Investigate What documents, information and searches should be checked?
Think What would I want to know if I was the client?
Advise Risks Process Timeframe Possible Outcomes Options Costs Cyber Warning



TAKE 2
Take a moment to stop and think.
What else?

Consider:
 Have you diarised dates arising from interaction?
 Should you confirm advice in writing?
 Confirming steps not being undertaken and consequences?

File Note

Matter number Author

Matter name Location

Client Time

Date Units

With Phone number

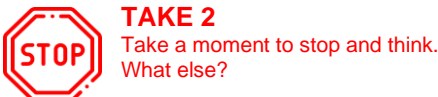
Attendance Physical attendance Court attendance Phone In/Out Other

Ask Why? – Test the client's objectives and expectations

Investigate What documents, information and searches should be checked?

Think What would I want to know if I was the client?

Advise Risks Process Timeframe Possible Outcomes Options Costs Cyber Warning



Consider:

Have you diarised dates arising from interaction?

Should you confirm advice in writing?


Confirming steps not being undertaken and consequences?

File Note

Matter number	Author
Matter name	Location
Client	Time
Date	Units
With	Phone number

Attendance Physical attendance Court attendance Phone In/Out Other

Ask	Why? – Test the client's objectives and expectations
Investigate	What documents, information and searches should be checked?
Think	What would I want to know if I was the client?
Advise	Risks <input type="checkbox"/> Process <input type="checkbox"/> Timeframe <input type="checkbox"/> Possible Outcomes <input type="checkbox"/> Options <input type="checkbox"/> Costs <input type="checkbox"/> Cyber Warning <input type="checkbox"/>

 **TAKE 2**
Take a moment to stop and think.
What else?

Consider:

Have you diarised dates arising from interaction?

Should you confirm advice in writing?

Confirming steps not being undertaken and consequences?

