**SCHEDULE A**

**Scope of Services**

**Example: Long List**

**[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 [describe].**

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

|  |  |  |
| --- | --- | --- |
|  |  | Advice about various procedural options including collaborative divorce, mediation, arbitration, parenting coordination and med/arb |
|  |  | Advice on substantive rights and obligations  |
|  |  | Advice about law and strategy related to an ongoing collaborative divorce process, mediation, negotiation or litigation |
|  |  | Formulate strategy and tactics |
|  |  | Communications with opposing counsel (on matters within scope) |
|  |  | Review correspondence  |
|  |  | Draft correspondence |
|  |  | Information about document preparation |
|  |  | Assistance with document preparation |
|  |  | Information about fact gathering, discovery or questioning |
|  |  | Investigate facts  |
|  |  | Assistance with drafting discovery or questioning requests |
|  |  | Assistance with computer support programs |
|  |  | Run computer support programs  |
|  |  | Obtain court documents |
|  |  | Review court documents  |
|  |  | Review transcripts  |
|  |  | Review documents obtained from others  |
|  |  | Advice about negotiations and the preparation and presentation of evidence and arguments |
|  |  | Legal research and analysis |
|  |  | Assistance with drafting a Case Brief |
|  |  | Assistance with drafting a Settlement Conference Brief |
|  |  | Assistance with drafting a Trial Management Conference Brief, |
|  |  | Preparation of your financial statement and supporting documentation  |
|  |  | Service and filing of your financial statement and supporting documentation  |
|  |  | Draft court application materials (i.e. Notice of Motion, Notice of Application, Notice of Appeal, Affidavit, Factums) |
|  |  | Draft Requests to Admit or Response to Requests to Admit  |
|  |  | Draft Requests for Information or Responses to Requests for Information |
|  |  | Draft or Analyze Offers to Settle/Settlement Proposals  |
|  |  | Review and Draft orders and judgments  |
|  |  | Enforce Orders |
|  |  | Prepare summons to witness  |
|  |  | Prepare client for court attendances (applications, conferences, trial) |
|  |  | Prepare client for negotiation  |
|  |  | Prepare client for mediation or arbitration |
|  |  | Coaching for participation in mediation or arbitration |
|  |  | Legal advice as needed during mediation or arbitration |
|  |  | Representation in up to \_\_ mediation or arbitration sessions. |
|  |  | Independent legal advice on Memorandum of Understanding or agreement |
|  |  | Drafting agreement based on Memorandum of Understanding coming out of mediation |
|  |  | Coaching on trial procedures and participation at trial |
|  |  | Prepare client for examination and cross-examination  |
|  |  | Contact Witnesses  |
|  |  | Contact Expert Witnesses  |
|  |  | Arrange for expert report(s) |
|  |  | Guidance and procedural information regarding filing and serving documents |
|  |  | File and Serve Court Papers |
|  |  | Review, analysis and coaching on client’s strategy for court attendances |
|  |  | Advice about an appeal or the appeal process |
|  |  | Procedural assistance with an appeal |
|  |  | Assistance with substantive legal argument |
|  |  | Appear in court (only for specific attendances agreed upon in advance)  |
|  |  | Conduct examination (written or oral) |
|  |  | Other: |

**[Explicit 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. 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:**

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

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

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

**Lawyer Date**

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

**Client Date**