

**CERTIFICATE OF LEGAL ADVICE AND PROCEDURE
COVID-19 CHECKLIST¹**

Client's name: _____

Client's address: _____

Client's _____ E-mail _____ address:

_____ Client's occupation:

_____ Client's 2019

income: _____ Client's 2019

net worth: _____ Client's Age:

_____ Date of

retainer by client: _____

Nature / purpose of retainer: _____

Frequency and regularity of contact with client: _____

Client's living arrangements and effective date:

-Resolved: _____

Status of issues as of March 2020 _____

-Outstanding: _____

- Urgency (if any) and why: _____

Plan and timeline for dealing with outstanding issues as of March 2020:

¹ Prepared by Maxine M. Kerr, *Family Law & Mediation*

Concerns noted as of March 2020:

What, if anything, has changed since March 2020 with respect to this client's matter:

I know about these changes because:

I have investigated the facts, identified the issues, ascertained my client's objectives, considered possible options, and advised my client on appropriate courses of action, including "waiting and seeing" at this time.

Yes No

Go no further until the answer to this question is "yes".

In particular, I have undertaken the following:

Is the significance of any change(s) known? *If more than one change, identify and address each.*

Yes No Unconfirmed

Yes No Unconfirmed

Unless the answer to this question is "yes", proceed with caution.

Nature of next steps and plan for implementation:

Reasons for next steps:

Implications of next steps—are they ascertainable?

Yes No Unconfirmed

Unless the answer to this question is "yes", proceed with caution.

I am satisfied that these next steps are appropriate at this time for the following reasons:

I have obtained instructions in writing from my client:

Yes No

Unless the answer to this question is "yes", proceed with caution.

In order to implement next steps, I have adapted to changing professional requirements, standards, techniques, and practices as follows:

Method of meeting(s) with client: _____

If virtual, platform used: _____

Other: _____

Dates of meeting(s) and duration: _____

I satisfied myself that my client was alone for our meeting(s) by taking the following precautions:

I satisfied myself that my client and I could each see and hear the other in our virtual meetings by using the following protocol:

I satisfied myself that no one was within eyesight or earshot of the client during our meeting(s) by taking the following steps:

I recorded our meeting(s):

Yes No

I first obtained my client's consent to recording our meeting(s):

Yes No

I saved the recording of our meeting(s):

Yes No

I took contemporaneous notes of our meeting(s):

Yes No

Also present with me during our meeting(s) was: _____

I prepared the client for meeting(s) as follows: _____

In my meeting of _____, I reviewed the factors indicated with a "X" on the attached Intimate Partner Violence and Power Imbalance Checklist. The client's responses and our discussion appear in my contemporaneous notes.

Yes No

In my meeting of _____, I reviewed the factors indicated with a "X" on the attached Independent Legal Advice Checklist². Comments appear in my contemporaneous notes.

Yes No

I witnessed the client's signature to _____ in our meeting of _____.

I had provided the client with _____ as a scanned document by _____ on _____.

Yes No

Before the client signed _____, he/she explained the document to me in his/her own words.

Yes No

I was satisfied that the client did, in fact, understand the nature and the effect of _____, including its benefits and its risks.

Yes No

I advised the client to hold up each page of the document to the camera before he/she signed it and to initial bottom right hand corners.

Yes No

The client signed the document in the manner I advised.

Yes No

The client and I were both present throughout the entire meeting(s), without interruption.

Yes No

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I made the following arrangements to obtain the signed documents from the client:

I reported to the client in writing after he/she signed _____.