

Ontario Lawyer Consultation Preparation Checklist

Prepared by Lawyers of Ontario | Information checked: 13 October 2026

Meeting a lawyer can feel overwhelming, especially when a legal problem affects your family, employment or business. You do not need to arrive with every answer. Your goal is to explain the situation clearly, identify anything urgent and learn whether the lawyer can help.

Use this checklist for an introductory meeting, whether it is paid, offered through a referral service or included in a firm's intake process. Confirm the fee and what the meeting covers before booking. A first conversation does not necessarily mean the lawyer has agreed to represent you.

1. Confirm the appointment

- ☐ Record the lawyer's name, appointment date, time, duration and meeting format.
- ☐ Ask whether there is a consultation fee, whether tax is extra and when payment is due.
- ☐ Ask what documents the firm wants and how to send them securely.
- ☐ Explain any language, interpretation, mobility, hearing or other access needs.
- ☐ Provide names of the people or organizations involved so the firm can check for conflicts before you share a detailed account.
- ☐ If a deadline or hearing is approaching, flag it when booking. Do not assume an appointment pauses a deadline.

2. Prepare a one-page summary

Write the main problem in two or three sentences. Then make a short timeline using dates rather than a long narrative. Separate what you know from what you suspect. Include facts that may be unfavourable as well as facts that support your position.

- ☐ What happened, and when?
- ☐ Who is involved, and what is your relationship to them?
- ☐ Have you received court papers, a notice, an offer or a request to sign something?
- ☐ What has already been done, including advice from another professional?
- ☐ What outcome matters most to you?
- ☐ What dates appear in the documents? Ask the lawyer to assess their significance.

Keep original records intact. Organize copies for the meeting and ask the lawyer how relevant records should be preserved. Do not alter messages or documents to make your account easier to explain.

3. Gather documents relevant to your issue

You do not need everything below. Ask the firm which items are useful and avoid sending sensitive material through an unverified contact form.

Legal issue	Documents to ask the firm about
Separation or parenting	Existing agreements or orders, relevant correspondence, and financial records if requested
Employment	Employment agreement, termination or severance documents, pay records and relevant correspondence
Criminal matter	Charging or release documents, court dates and correspondence from previous counsel; ask what information to provide securely
Business or contract dispute	Contracts and amendments, invoices, notices, correspondence and a short transaction timeline
Property transaction	Agreement of purchase and sale, closing date and relevant lender or property documents
Estate matter	Will or estate documents you lawfully hold, relevant correspondence and key dates

Bring identification if the firm requests it. If an important document is missing, say so rather than delaying contact about an urgent matter.

4. Ask these questions during the consultation

- Does your practice regularly handle this type of issue?
- Can you take this matter, and who would do the work?
- What is the most urgent step or deadline to address?
- What options should I consider, including alternatives to a court proceeding where appropriate?
- What information is missing before you can give a meaningful assessment?
- What work would be included in the proposed retainer, and what would be excluded?
- How are fees calculated? What taxes, disbursements or other costs might arise?
- Is an initial deposit required, and when might it need replenishing?
- Could a limited scope engagement fit my needs, and what would I remain responsible for?
- How will we communicate, and what response times should I expect?
- What can you estimate now, and what remains uncertain?
- What must happen before you start work or take responsibility for a deadline?

5. Complete your meeting worksheet

Keep this worksheet privately. It is for your own preparation; you do not need to submit it to Lawyers of Ontario.

Item	Your notes
Appointment and lawyer	_____
Main issue	_____
Most important outcome	_____
Known dates to discuss	_____
Three questions I need answered	_____
Documents still missing	_____
Proposed scope and fee	_____
Next action, responsible person and date	_____

6. Before leaving the meeting

- ☐ Summarize your understanding of the next step and ask the lawyer to correct it.
- ☐ Confirm whether the lawyer has accepted the matter or is still considering it.
- ☐ Obtain the proposed engagement terms in writing and ask about anything unclear.
- ☐ Confirm who will address any approaching deadline.
- ☐ Ask for a referral or another route to help if the firm cannot act.

Where to start looking

The [Law Society of Ontario directory](#) lets you check practising status and search for a legal professional. Its [referral service](#) offers an introductory consultation of up to 30 minutes without charge through participating professionals. This is not a promise of free document preparation or ongoing representation. Check the service's current terms.

You can also [browse law firms on Lawyers of Ontario](#). A directory listing is a starting point for your own assessment, not a guarantee of suitability or availability.

Sources and scope

Official references: [Law Society directory](#) and [Law Society Referral Service](#). The preparation checklist and worksheet are editorial tools, not a statement of legal requirements. General information only; this resource does not provide legal advice or create a lawyer-client relationship.