INTRODUCTION

[ ] 1. Begins interview appropriately.

[ ] 2. Allows client to explain problems, concerns and goals.

[ ] 3. Summarizes lawyer’s understanding of client problem, concerns and goals.

[ ] 4. Explains preliminary matters and structure of the interview.

HISTORY

[ ] 5. Encourages client to relate history of problem using appropriate techniques.

6. Avoids interrupting client with questions except to:
   (a) clarify;
   (b) keep client on track; and
   (c) avoid chronological gaps.

QUESTIONING

[ ] 7. Identifies potentially relevant topics.

[ ] 8. Questions client thoroughly and systematically on each topic to obtain relevant facts.

[ ] 9. Uses appropriate questioning techniques to motivate and exhaust client’s recall of relevant facts.

[ ] 10. Identifies further facts required.

[ ] 11. Avoids giving premature legal advice.

ADVISING/CONTENT

[ ] 12. Gives a brief introduction to the advising process.

[ ] 13. Briefly outlines the relevant law.
14. Applies the law to the client’s problem by:
   (a) explaining the client’s legal rights or obligations;
   (b) outlining the available legal and non-legal options and related procedure; and
   (c) identifying and assessing the advantages and disadvantages of each option.

15. Advice given:
   (a) is accurate;
   (b) is realistic;
   (c) is not prejudicial to client’s interests; and
   (d) uses common sense; and
   (e) is qualified if necessary.

16. Encourages client to make decision (if appropriate, lawyer makes recommendation).

17. Deals appropriately with ethical issues, if any.

ADJOURNING

18. Explains fees (including disbursements, taxes and retainer).

19. Determines if the lawyer is retained, and agrees on terms of payment.

20. If appropriate, refers client to other source of assistance.

21. Confirms a plan which specifies:
   (a) steps to be taken;
   (b) time frames;
   (c) methods of obtaining further facts; and
   (d) lawyer and client responsibilities.

22. Adjourns interview.

PRESENTATION

23. Establishes and maintains rapport with client.

24. Demonstrates effective listening skills.

25. Uses language which:
   (a) is clear and concise;
   (b) avoids legal jargon; and
   (c) explains legal terms.

26. Demonstrates courteous and professional attitude.

27. Provides smooth transition between interview stages.