**SCHEDULE A – Example Template**

**Scope of Services**

**Example: Coaching client to attend mediation**

**[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 coaching you to participate in mediation sessions with your [partner/spouse/other] scheduled for [dates].**

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

|  |  |  |
| --- | --- | --- |
|  |  | Advice on substantive rights and obligations related to the mediation sessions |
|  |  | Advice about law and strategy related to the mediation sessions |
|  |  | Advice on other alternative resolution processes |
|  |  | Advice on limitation periods and other time deadlines relevant to this matter |
|  |  | Communications with opposing counsel (on matters within scope) |
|  |  | Review correspondence |
|  |  | Draft correspondence |
|  |  | Review court documents, if any |
|  |  | Review documents relevant to the issues being mediated |
|  |  | Provide information about the mediation process |
|  |  | Consultation with you to obtain information relevant to the mediation sessions |
|  |  | Investigate facts |
|  |  | Researching the law relating to the issues being mediated |
|  |  | Gathering relevant caselaw and discussing with you |
|  |  | Preparing draft mediation brief and discussing it with you |
|  |  | Prepare other documents to be used in the mediation sessions |
|  |  | Preparation of final version of mediation brief |
|  |  | Coaching on your participation in the mediation sessions |
|  |  | Being available to take phone calls from you during a mediation session |
|  |  | Other: see below |

**[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. For this example, 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 mediation session or Court hearing.
* 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:**

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

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

**Lawyer Date**

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

**Client Date**