

**Direct Access: New Client Form**

**Client’s Details**

|  |  |
| --- | --- |
| Name |  |
| Address |  |
| Tel/Mobile |  |
| Email |  |

**Opposing Party’s Details:**

|  |  |
| --- | --- |
| Name |  |
| Address |  |
| Tel/Mobile |  |
| Email |  |

**Case Summary:**

Before we first speak over the telephone please email me:

1. a detailed chronology of the facts in the case, cross-referenced to documents in your possession;

2. a statement in your own words of:

2.1 the nature and financial value of the claim;

2.2 your interest in the disputed estate;

2.3 the events leading up to the claim; and

3. copies of key documents in the case (including any will, IHT 400, Grant of Probate, Caveat, and correspondence) to be listed in your email:

**Deadlines/Hearing Dates:**

When was the Grant of Probate obtained?

Please specify any Court imposed deadline below:

|  |  |
| --- | --- |
| Alternative Dispute Resolution | What (if any) attempt has been made to resolve the dispute amicably, e.g. by mediation? |
| Legal Aid/Insurance? | Please note that I do not undertake public access work funded by legal aid or on a contingency fee basis. My fee structure is fixed for payment in advance after the work has been scoped following an initial review of the papers in the case. |
| Does client need a solicitor? | I will discuss this with you during our initial telephone discussion. A public access Barrister is required to review whether or not a client requires a solicitor throughout the conduct of the case. For more information please download and read my ‘Guide to Instructing a Public Access Barrister’ which you will find a link on the 1 Essex Court page of this website. |
| Is the client vulnerable? | To be evaluated when we speak. |
| Instructions/Fee discussions | Please note that I do not undertake public access work funded by legal aid or on a contingency fee basis. My fee structure is fixed for payment in advance after the work has been scoped following an initial review of the papers in the case. |
| Identity checks completed? | Please provide a copy of your driver’s licence or of the photograph page of your passport together with a utility bill that specifies your home address, which is less than 3 months old. |