

What to bring, and what to think about first

A first meeting with a lawyer works best when you arrive with the paper in front of you and the questions already written down. You will not remember everything in the room, and most people leave having forgotten the one thing they meant to ask. Use this sheet to get ready. Bring what you have. Nobody expects a complete file.

Bring these, whatever your matter is

- ☐ **Government photo identification** for yourself, and for anyone else who is part of the matter and coming with you.
- ☐ **Every document you have already received about this matter.** Letters, emails, court papers, forms, notices, invoices, contracts. Bring the originals if you have them and copies if you do not.
- ☐ **A written timeline of what happened,** with real dates. One page is enough. Dates matter more than adjectives.
- ☐ **The names of everyone involved,** including the other side, any company names, and anyone who has already given you advice about this.
- ☐ **Any deadline you have been given, in writing,** and the document it came from. Say it out loud at the start of the meeting.
- ☐ **The name of any other lawyer or paralegal** who has acted for you on this matter, and whether they still hold your file.
- ☐ **Your questions, written down and in priority order.** Start with the one that keeps you up at night.

If you have been served with a court document, told you have a number of days to respond, or given a date to appear, bring that document to the top of the pile and say so in the first minute of the meeting. A deadline that has already passed changes what can be done, and it is the one thing that cannot be fixed later.

Think about these before you arrive

- ☐ **What outcome would you accept?** Not the best case, the acceptable case. This shapes the strategy more than anything else you say.
- ☐ **What is the deadline you are working against,** and who set it?
- ☐ **What have you already said or signed?** Text messages, emails, recorded calls, and signed forms are all evidence. Bring them even if they hurt your position, especially if they hurt your position.
- ☐ **Who else knows about this,** and is anyone else likely to be a witness?
- ☐ **What is at stake in money,** as a number, even a rough one.
- ☐ **Which language you would like to meet in.** Consultations are available in English, Hindi, Urdu, Farsi, Persian, Punjabi, Spanish, and Tamil. Say so when you book so we can arrange it.

Questions worth asking us

- ☐ What are my realistic options, and what does each one cost?
- ☐ What is the likely timeline, and what happens if nothing happens?
- ☐ What is the worst realistic outcome, and how likely is it?
- ☐ What do you need from me, and by when?
- ☐ Who will be doing the work, and how will I hear from you?
- ☐ What can I do myself to keep costs down?

Bring these as well

Add the items under whichever heading matches your matter. If more than one applies, bring both sets.

CORPORATE

- ☐ Articles of incorporation, the corporate minute book, and any shareholders' or partnership agreement.
- ☐ The corporation's legal name, corporation number, and fiscal year end.
- ☐ Any contract that is causing the problem, plus the emails around how it was negotiated.
- ☐ The last two years of financial statements, and the most recent notice of assessment.
- ☐ A list of the owners, their percentages, and who is a director and who is an officer.
- ☐ Any letter of intent, term sheet, or offer you have received or sent.

CIVIL LITIGATION

- ☐ The contract, invoice, or promise the dispute is about.
- ☐ Every letter, email, and text between you and the other side, in date order.
- ☐ Any court document you have been served with, including the envelope it arrived in, because the date of service matters.
- ☐ Proof of what you lost: invoices, receipts, bank records, quotes for repair or replacement.
- ☐ The date you first realised you had a problem. Most Ontario civil claims run on a basic two-year limitation period from the day the claim was discovered, and there are shorter deadlines in some situations.

FAMILY

- ☐ The date of marriage, the date you began living together, and the date of separation.
- ☐ Your marriage certificate, and any cohabitation agreement, marriage contract, or separation agreement.
- ☐ Three years of tax returns and notices of assessment, recent pay stubs, and your most recent T4.
- ☐ Statements for every bank account, credit card, loan, mortgage, RRSP, TFSA, and pension, both as at the date of separation and current.
- ☐ Any existing court order or agreement about parenting time, decision-making, or support.
- ☐ The children's names and dates of birth, and the current parenting schedule as it actually runs, not as it was agreed.

CRIMINAL

- ☐ Your promise to appear, undertaking, release order, or summons, with the next court date and courthouse.
- ☐ Any disclosure the Crown has provided.
- ☐ The exact charges as written on the document, not as they were described to you.
- ☐ Any bail conditions you are currently under, and whether you have been able to follow them.
- ☐ Names and contact details of any witnesses.
- ☐ Say as little as possible to police in the meantime, and bring a note of anything you have already said.

IMMIGRATION

- ☐ Passports and travel documents for everyone in the application, including expired ones.
- ☐ Every letter or decision from Immigration, Refugees and Citizenship Canada or the Canada Border Services Agency, including refusal letters.
- ☐ Your current status document: visitor record, study permit, work permit, permanent resident card, or refugee claim paperwork.
- ☐ Application numbers, UCI, and the online account the application was filed under.
- ☐ Birth certificates, marriage certificates, and any divorce or death certificates for family members in the application.
- ☐ Any deadline in a letter you have received. IRCC deadlines are short and are rarely extended.

WILLS AND ESTATES

- ☐ Any existing will, power of attorney for property, or power of attorney for personal care.
- ☐ A list of what you own and what you owe, with rough values, including anything outside Canada.
- ☐ How each asset is held: alone, jointly, or with a named beneficiary.
- ☐ Names, addresses, and dates of birth of the people you want to benefit, and of the people you want to act as estate trustee or attorney.
- ☐ Details of any dependant, minor child, or family member with a disability.
- ☐ If someone has died: the death certificate, the original will, and a list of the assets you know about.

MY QUESTIONS

Bring what you have and do not delay the meeting to assemble a perfect file. A half-complete folder discussed on time is worth more than a complete one discussed after a deadline. If you are unsure whether something matters, bring it, and let us decide. To book, contact Telesh Law Firm Professional Corporation at teleshlawfirm.ca or call 416-639-0887.

CURRENT AS AT AUGUST 2026

This checklist is general information, not legal advice, and does not create a solicitor-client relationship. It is current as at its publication date and is not revised as the law changes. For advice on your specific situation, book a consultation at teleshlawfirm.ca or call 416-639-0887.

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