

PREPARING FOR INDEPENDENT LEGAL ADVICE

A Worksheet for Reducing the Information Gap



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BEFORE YOU BEGIN

Whether or not you choose to seek independent legal advice is a personal decision. If you do, the quality of the advice you receive depends, in part, on the quality and completeness of the information you provide.

This worksheet is designed to help you organize your thoughts, distinguish facts from assumptions, and identify information that may be important before meeting with a lawyer.

There are no right or wrong answers.

The goal is simply to help you present the fullest picture possible.

Part 1 – My Goals

Why am I seeking independent legal advice?

- To better understand my legal rights
- To review a proposed agreement
- To understand possible outcomes
- To identify issues I may have overlooked
- Other:

What questions do I most want answered?

Part 2 – Facts vs. Conclusions

Many people unintentionally mix facts with conclusions. Write only facts in the left column. Write your interpretation in the right column.

Facts

My Interpretation

Ask yourself:

Could someone else honestly interpret these same facts differently? Yes No If yes, how?

Part 3 – Financial Disclosure Check

Have I gathered:

- Income information
- Tax returns
- Bank statements
- Credit card statements
- Mortgage information
- Property records
- Pension information
- Investment statements
- Business information (if applicable)
- Debt information
- Household budget
- Other supporting documents

Missing documents:

Part 4 – The Other Person's Perspective

This section may be the most important.

Imagine you were explaining the situation from the other person's point of view.

They would probably say:

What facts might they rely upon?

Part 5 – What Might I Be Missing?

Have I assumed something without checking?

Yes No

Am I relying on memory instead of documents?

Yes No

Could additional records change my understanding?

Yes No

Have I asked enough questions before reaching conclusions?

Yes No

Part 6 – Confidence Check

Before your appointment, rate your confidence.

I believe I understand the situation:

1 2 3 4 5 6 7 8 9 10

Now ask yourself:

What information would lower my confidence?

What information would increase my confidence?

Part 7 – Questions to Ask My Lawyer

Instead of asking: "Who's right?"

Consider asking:

- What additional information would help you advise me?
- Are there assumptions I'm making?
- What facts could change your opinion?
- What documents should I gather?
- Are there issues I haven't considered?
- What are the strengths and weaknesses of my position?
- What would you want to know from the other person?

Add your own questions:

Part 8 – Reflection

Complete this sentence.

After completing this worksheet, I realize...

One thing I still need to clarify is...

Remember

The purpose of independent legal advice is not simply to confirm what you already believe.

Its greatest value comes from helping you understand your situation as completely and accurately as possible.

The more complete the information, the more informed the advice.

Next Steps

Before your appointment:

- Review this worksheet.
- Gather any missing documents.
- Organize your financial disclosure.
- Bring a copy of any proposed agreement.
- Write down your remaining questions

About Alliston Resolutions

At Alliston Resolutions, we believe that informed decisions begin with informed conversations. Whether you're considering mediation, preparing for legal advice, or working toward a separation agreement, our goal is to help you understand the whole picture so you can move forward with confidence.

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