Notes for use:

Modify and update this template Supervision Client Advice Summary Sheet before use.

Steps:

1. Update and change text in [Square brackets and red text]
2. Delete this cover page
3. Save the document

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date |  | | Advisor / caseworker | | |  | |  |
|  | |  | |  |
| Client details | | | | | | | |  |
| Name |  | | Address | | |  | |  |
|  | |  | |
| Phone |  | |  | |  |
|  | |  | |
| Email |  | | Postcode | | |  | |  |
|  | |  | |
|  | | | | | | | |  |
| Eligibility | | | | | | | |  |
| Is the matter with scope for legal aid? | | | | Yes | | No | |  |
|  | | | | | | | |  |
| Legal expenses insurance | | | | | | | |  |
| **Policy description:**  \* Advisers should establish at the first client meeting and prior to any advice given whether the matter is covered by a policy legal expenses insurance under which clients are entitled to receive legal advice which is paid for by their insurer (see, for example, LawWorks’ legal expenses insurance guidance).  **Taking a step in the client’s matter could compromise their entitlement to claim under their legal expenses insurance policy.** | | | | | | | | |
|  | | | | | | | |  |
| Description of matter | | | | | | | |  |
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|  | | | | | | | |  |
| Advice given | | | | | | | |  |
|  | | | | | | | | |
| Advice given continued…. | | | | | | | |  |
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|  | | | | | | | | |
| Instructions given | | | | | | | |  |
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| Next steps if any have been agreed | | | | | | | |  |
|  | | | | | | | | |
| Time engaged: | | | | | | | | |
|  | | | | | | | | |
|  | | | | | | | |  |
| **Signed:** | |  | | | **Dated:** | |  |  |
|  | | |  |
| **(Adviser)** | | | | | | | |  |