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 |  |
|  |
|  |  |
| Advice given |  |
|  |
| Advice given continued…. |  |
|  |
|  |
| Instructions given |  |
|  |
|  |
| Next steps if any have been agreed |  |
|  |
| Time engaged: |
|  |
|  |  |
| **Signed:** |  | **Dated:** |  |  |
|  |  |
| **(Adviser)** |  |