

**CONFIDENTIAL QUESTIONNAIRE**

*To assist us in preparing your file, please complete the following information, which will be kept completely private and confidential.*

Today's Date: \_\_\_\_\_

How were you referred to our firm? \_\_\_\_\_

NAME (in full) Dr. Mr. Mrs. Ms. Miss \_\_\_\_\_  
Surname First Name Middle Name

**RESIDENCE ADDRESS** \_\_\_\_\_

Street Name and Number

Apartment or Unit Number

City

Province

Postal Code

HOME TELEPHONE # (\_\_\_\_\_) \_\_\_\_\_

HOME FAX # (\_\_\_\_\_) \_\_\_\_\_ Is this a confidential fax? \_\_\_\_\_ Or should we call you before faxing? \_\_\_\_\_

CELL # (\_\_\_\_\_) \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

*Mailing address if different than above, please provide full details below:*

**MAILING ADDRESS** \_\_\_\_\_

Street Name and Number

Apartment or Unit Number

City

Province

Postal Code

**EMPLOYMENT INFO** \_\_\_\_\_

Name of Company or Firm

\_\_\_\_\_  
Street Name and Number

\_\_\_\_\_  
Apartment or Unit Number

\_\_\_\_\_  
City Province Postal Code

NATURE OF BUSINESS \_\_\_\_\_

BUSINESS TELEPHONE # (\_\_\_\_\_) \_\_\_\_\_ Extension # \_\_\_\_\_

BUSINESS FAX # (\_\_\_\_\_) \_\_\_\_\_ Is this a confidential fax? \_\_\_\_\_ Or should we call you before faxing? \_\_\_\_\_

POSITION HELD \_\_\_\_\_ How Long? \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ BIRTHPLACE \_\_\_\_\_  
Month Day Year City, Province, Country

SOCIAL INSURANCE NUMBER \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

What is the best way to contact you?  Email  Cell Phone  Home Phone  Business Phone

Are there any special instructions for contacting you? (ie. certain times of day, days of the week, don't leave detailed message) \_\_\_\_\_

*\*IS THERE ANYONE ELSE WE MAY CONTACT IN AN EMERGENCY IF WE ARE UNABLE TO REACH YOU AT ANY OF THE ABOVE NUMBERS?*

EMERGENCY CONTACT \_\_\_\_\_ PHONE # (\_\_\_\_\_) \_\_\_\_\_  
Name

**OPPOSING PARTY CONTACT INFORMATION**

NAME (in full) \_\_\_\_\_  
Surname First Name Middle Name

COMPANY NAME \_\_\_\_\_  
If opposing party is a corporation please provide as much detail as possible

ADDRESS \_\_\_\_\_  
Street Name and Number  
\_\_\_\_\_  
Apartment or Unit Number  
\_\_\_\_\_  
City Province Postal Code

HOME # ( ) \_\_\_\_\_ WORK # ( ) \_\_\_\_\_ Ext.# \_\_\_\_\_

Are you the plaintiff or defendant? \_\_\_ Plaintiff \_\_\_ Defendant

Please briefly describe the nature of the litigation:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you are the defendant, have you been served with a Statement of Claim or other court application?

\_\_\_ Yes \_\_\_ No

If yes, on what date were you served and in what manner?

\_\_\_\_\_  
\_\_\_\_\_

If you are the plaintiff, have you commenced any legal proceedings?

\_\_\_ Yes \_\_\_ No

In which court were proceedings commenced? \_\_\_\_\_

Have any court orders been made? (If so, please provide copies of all court documents) Yes No

Present status of proceedings (ie. any court dates pending, etc.?) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

When did the cause of action originate? Usually, this will be the date on which an allegedly negligent act occurred or on which a debt was incurred. If you are unsure, please give a very brief outline of relevant dates.

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Have there been any attempts to settle the issues, such as mediation, arbitration or settlement meetings? Please describe.

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What relief do you seek?

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Are there any urgent matters that require immediate attention?

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Is there any other information or problem you wish to discuss? If so, please outline below:

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**WOOD, WHITE & GOLD LLP**  
**PRIVACY STATEMENT**

*As of January 1<sup>st</sup>, 2004, all private companies engaged in commercial activities must comply with the Personal Information Protection & Electronic Documents Act ("the Act"), unless federal cabinet has exempted the organization because it is subject to "substantially similar" provincial legislation. Your information is also protected by solicitor-client privilege and the Rules of Professional Conduct governing lawyers in the Province of Ontario, which in most respects is a greater protection than that afforded under the Act.*

**WOOD, WHITE & GOLD LLP** is responsible for the personal information we collect, use, maintain and disclose. To ensure this accountability, we have developed a Privacy Policy (available upon request), and have provided training to our managers and support staff on how to properly implement our privacy policies and practices.

*We have asked you to fill out this form because collecting some of your personal information is required as part of our legal services to you. We may at times collect sensitive financial, family, and personal preference information from you, which is required in order to provide you advice and legal services. By providing such information you consent to the use of the information as outlined in the form and for the purposes of providing you with legal advice and services.*

*We will keep the personal information that you provide to us in this form completely confidential. We will not disclose your personal information provided in this form to any third party without your consent.*

**Wood, White & Gold LLP** is committed to protecting your privacy and we take all reasonable precautions to ensure that your personal information is kept safe from loss, unauthorized access, modification, or disclosure. We operate on a secure data network protected by an industry standard firewall and password protected systems. Our security and privacy policies are periodically reviewed and enhanced, and only authorized individuals at our firm have access to your personal information.

*If you have any questions relating to the collection, use, disclosure, and/or accuracy of your personal information provided by you and held by **Wood, White & Gold LLP**, please contact our Privacy Officer at [frankie@woodwhitegold.ca](mailto:frankie@woodwhitegold.ca).*

*WOOD, WHITE & GOLD LLP*  
*Barristers, Solicitors and Notaries Public*

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