

GARDINER MILLER ARNOLD LLP
BARRISTERS & SOLICITORS

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**CLIENT INFORMATION FORM FOR
 CONDO OWNERS' STRATEGY SESSION**

CLIENT DETAILS:		
Client 1:	Full legal name:	
	Mailing address, incl. postal code:	
	Telephone (home):	
	Telephone (business):	
	Telephone (cell):	
	Email:	
	Occupation:	
<i>If you co-own your unit with your spouse, please provide spouse's details below:</i>		
Client 2:	Full legal name:	
	Telephone (home):	
	Telephone (business):	
	Telephone (cell):	
	Email:	
	Occupation:	
CONFLICT CHECK:		
Give us the name of your condo corporation: (e.g.: YCC 123, MTCC 1234, TSCC 2345, etc.)		
TYPE OF CASE:		
Briefly describe the nature of your problem or question - (e.g.: wrongful condo lien; requisition meeting; request for records; maintenance/Repair issue; noise/nuisance from common elements, etc.) Attach a more detailed memo if you wish, not exceeding 2 pages. List the specific question(s) or issue(s) that you need help with. <i>Do not provide any confidential information at this time until we have cleared conflicts.</i>		

Have you been served with court papers? If so, when and how?	
REFERRAL SOURCE:	
How did you hear about us? From our website (gmalaw.ca?) From our Ontario Condo Law Blog? Was there a specific lawyer who you spoke to at our office?	
FEE DETAILS:	
<p>Our fee for the initial Condo Owners' Strategy Session is \$500.00 plus HST for a total of \$565.00. The fee must be paid in advance, prior to the appointment being booked.</p> <p>Our fee covers the Condo Owners' Strategy Session only, which is a virtual meeting with a GMA Condolawyer of up to one hour in length. Additional time for the strategy session will be billed at the rate of \$395/hr. plus taxes. Additional steps or services will be billed at GMA's standard hourly rates which we will describe prior to accepting or undertaking additional work.</p> <p>The fee may be paid by credit card, certified cheque or draft, or online in advance. The fee will be held in trust until the meeting is held and an account is rendered.</p>	
Credit card type:	<input type="checkbox"/> VISA <input type="checkbox"/> MASTERCARD
Credit Card number:	
Expiry Date:	
Name on Card	
<p>THE UNDERSIGNED hereby authorizes GMA to charge the credit card identified above in the amount of \$565.00 on account of services to be rendered, which funds shall be held in trust until the services are rendered.</p> <p>SIGNATURE OF CARD HOLDER: _____</p>	
TERMS OF RETAINER	
<p>I/we retain Gardiner Miller Arnold LLP ("GMA") for a Condo Owners' Strategy Session for the purpose of providing a summary assessment of my case and to answer questions pertaining to the rights and obligations of condo corporations and unit owners. GMA is not bound by or liable for any legal advice except when I request a written legal opinion and provide comprehensive and accurate information.</p> <p>If additional steps are required above and beyond the Strategy Session, a further retainer agreement for those services may be required and additional fees are payable.</p> <p>I/we have reviewed GMA's Standard Terms and Conditions attached to its General Retainer Agreement (posted at www.gmalaw.ca) and agree to be bound by them.</p>	

Law Society Client Identification Verification Requirements

Please select the option that best describes the type of client you are, so that we can comply with Law Society client identification regulations:

An individual. Upon request, you must provide GMA with original government-issued identification that is valid and has not expired, such as a driver's licence, birth certificate, passport or similar document.

An organization such as a corporation created or registered pursuant to an Act. You must provide GMA upon request with a copy of a written confirmation from a government registry as to the existence, name and address of the organization, which includes the names of the organization's directors, if applicable, such as:

- i. a certificate of corporate status issued by a public body,
- ii. a copy obtained from a public body of a record that the organization is required to file annually under applicable legislation, or
- iii. a copy of a similar record obtained from a public body that confirms the organization's existence.

An organization other than a corporation (e.g. a trust or partnership which is not registered in any government registry). You must provide GMA upon request with a copy of the organization's constating documents, such as a trust or partnership agreement, articles of association or any other similar record that confirms its existence as an organization.

I/We certify that the above information is true and correct, and we agree to the above terms.

Dated: _____, 202

Signature of Client 1

Signature of Client 2 (if applicable)

A note on collection of personal information: GMA uses and discloses your personal information only for the purposes for which it was collected. GMA does not sell or rent personal information to any organization or person for any reason.

Please fax or email the completed and signed information form to:

condowners@gmalaw.ca

You will be contacted within 72 hours.