

## Will Challenge Checklist

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This checklist outlines the estate litigation process with various tasks to be performed so as to manage the file efficiently.

Task	Timeline	Details	Status	Complete
<b>Initial Steps</b>				
Initial Contact	N/A			[ ]
Thank You Card to Referring Source	Within 48 hours from initial contact			[ ]
Conflict Search				[ ]
Open File				[ ]
Initial Meeting				[ ]
Client ID Obtained	During initial meeting			[ ]
Retainer Letter	Within 48 hours after initial meeting			[ ]
Urgent Steps to be Taken as Set out in Initial Meeting	Within 24 hours after meeting			[ ]
Engage the Other Side	Within 5 days of being retained			[ ]
Lock Down Strategy — clerk and associate to lock down strategy and e-mail sent to partner Re: same	Within 7 days of being retained			[ ]
Detailed Chronology	Within 7 to 14 days of being retained			[ ]
Initial Report to Client	Within 7 to 14 days of being retained			[ ]
<b>Ongoing Steps</b>				
File Review	Every two weeks (Completion Reports)			[ ]
Interim Reports to Clients	Every 30 days at least			[ ]
<b>Litigation Steps</b>				
Application/Motion for Directions or Responding Materials				[ ]
Order for Directions Obtained				[ ]

<b>Task</b>	<b>Timeline</b>	<b>Details</b>	<b>Status</b>	<b>Complete</b>
Intense Investigation — records gathered as per Order Giving Directions				[ ]
Review of Records Obtained				[ ]
Ascertain whether there are independent witnesses (neighbours or friends) who may assist and support position. If so, contact and interview.				[ ]
Mediation	Usually after obtaining documentary disclosure			[ ]
Preparation of Affidavit of Documents				[ ]
Discoveries				[ ]
Pre-Trial				[ ]
Trial				[ ]
Appeal (Divisional Court, Court of Appeal, Supreme Court)				[ ]
<b>End of File</b>				
Purge file and send the original documents back to client.				[ ]
Thank You Card Sent to Referring Solicitor	At end of file			[ ]