**Template Instruction Form**

If you have contacted one of the panel firms and used their informal discussion helpline to assess that the issue needs instruction then you may need to fill in the form below to help your lawyer understand the issue and begin working with their colleagues on providing you with the advice needed.

***Remember to reference the legal panel framework agreement to ensure the discounted rates are offered. Please quote LPF2012.***

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| **ORGANISATION INFORMATION** | |
| Full Name |  |
| Address  (post code) |  |
| Legal status | Please tick as appropriate:  Unincorporated Association (i.e. a trust; membership based body):  Charity:  Limited Company:  CASC:  Other: |
| Additional status information | Charity:  CASC:  Other: |
| Constitution | Please tick to confirm you have provided a copy of your constitutional document |

|  |  |
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| **AUTHORISED CONTACT PERSON** | |
| Name |  |
| Position |  |
| Email Address |  |
| Direct Line |  |
| Mobile |  |
| Specific Reporting Requirements |  |

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| **BUDGET AND FEES** | |
| Budget Allocation and Invoicing | Please tick if you have allocated legal budget to cover this work:    Please list below any information regarding cash-flow and invoicing that the firm needs to be aware of: |
| Third party payment | Please tick if a third party has agreed to pay your legal costs:    Provide address and contact details for them below:  *Please note that regardless of any agreement that is reached with any third party for the payment of costs, you will remain liable as the client for such costs if the third party does not pay.* |

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| Fees | Please tick your preferred fee option:  Fixed fee  Hourly rate  Please list below the areas you wish to clarify in relation to fees and costs: |

|  |  |
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| **OVERVIEW OF THE ISSUE** | |
| Nature of issue and over-view |  |
| History of the matter |  |
| Knock on consequences and worst outcome for you |  |
| Objectives and what you would like to achieve |  |
| Risk Appetite |  |
| Other parties | Name of other parties:  Name of lawyers representing them: |
| Key Documentation | Please tick if you have attached key documentation or state when you will be able to send documentation if not attached    Date it will be sent ... |

|  |  |
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| **FORMAT AND TIMING OF ADVICE** | |
| Format of advice | For some issue such as disputes there will be a need to draft correspondence, complete forms, and provide advice – your lawyer will advise you of this.  Please tick your preferred format to receive the advice, if more than one then tick all that are appropriate:  Face to Face Meeting:  Video Conference  Telephone Conference  Written advice: |
| Critical Timelines | Please state the date of Board or committee meetings or other dates where there are decision making opportunities:  Please state if there is a fixed deadline for when you need advice on this issue to be finalised: |

You may decide to discuss this form with your lawyer before filling it in – however it is a good idea to begin preparing the information in the form for your initial discussion and fill in as much of the form as you can to save time.