

## **Mediation – Contract and First Joint Session**

Dear \_\_\_\_\_,

I hope you both are having a good week so far

Reaching out to provide some information/instructions on next steps, and coordinate your first joint session in a few weeks.

### **Mediation Contract**

We have sent this out for e-signature via HelloSign. You will receive an email from HelloSign which will prompt you to review and e-sign. Kindly do so at your next convenience. Once all parties have signed, everyone will automatically receive a fully executed copy.

### **Mediation Session**

Our mediation sessions are held via Zoom and we schedule 2 hours for the session.

Alexa/Victoria is available as follows:

**Tuesday May 18<sup>th</sup> 10am-12pm** or **1pm-3pm**

**Thursday May 20<sup>th</sup> 10am-12pm** or **1pm-3pm**

We are only able to hold these dates for **48 hours**. Kindly let us know your preferred availability, and we will provide the Zoom details once confirmed.

### **Payment**

We require a retainer of **\$TBD each**, or **\$TBD total**. Payment can be made via e-transfer to [julia@resolvedr.com](mailto:julia@resolvedr.com). Once payment has been received, I will confirm receipt.

If you have any questions about any of the above, please do not hesitate to contact me. I am here to help!

## **Initial Consultation**

Dear [CLIENT'S NAME],

Thank you for your interest in Resolve Dispute Resolution.

We have scheduled an initial consultation for you with Alexa/Victoria:

on: **[Date and Time]**

via: **Zoom Details**

### **Prior to the meeting, we require:**

1. **Intake Form** – attached here. Complete and email back to me
2. **Payment** – Victoria's / Alexa's fees are **\$TBD**/hour plus H.S.T. For the 1.5 hour consultation, we request that you pay for your initial consultation **\$TBD** (HST incl.) prior to the meeting via E-Transfer to: [julia@resolvedr.com](mailto:julia@resolvedr.com)
3. **Photo ID** – Please provide a piece of Photo ID (e.g. photo of your Driver's License), so that it may be kept on file. This is a requirement under By Law 7.1 of the Law Society.

In the meantime, we would like to invite you to visit our website [www.resolvedr.com](http://www.resolvedr.com) where you can find more information about Alexa/Victoria and the Collaborative Practice/Mediation process.

Please feel free to contact me if you have any questions – I am here to help.

## E-signing Procedure

Dear [CLIENT],

In advance of your scheduled signing meeting on **[date]**, here are a few procedures/ guidelines to be aware of and review:

1. **HelloSign** – We have circulated the **[Agreement/ Financial Statement/ Affidavit]** via “HelloSign” for electronic signature. You will receive an email to **[client email]** under separate cover from HelloSign. Directly before the meeting with Alexa/Victoria, please open this HelloSign email and then click to open the [agreement]. Do not sign just yet – only with Alexa/Victoria present during your scheduled video call to ‘witness’ you signing.
  
2. **Meeting on Zoom** -
  - a. Please connect to this Zoom meeting with a **Laptop or Tablet** with your camera and audio **ON**. As mentioned, part of this signing meeting has to be ‘witnessed’ by Alexa/Victoria, so we require these features to be on.
  
  - b. We also need to you “Share your Screen”. In the meeting, you will notice the button “Share Screen”. By clicking “Share Screen”, please share the HelloSign **[Agreement]** you have opened so that Alexa/Victoria can witness you signing.

If you have any questions or require technical assistance, please do not hesitate to contact me.

## Financial Disclosure Request

Hi [client],

I hope this email finds you well.

Victoria/Alexa asked that I reach out to you to prepare your financial statement and accompanying disclosure. *[I understand that a CBV will be gathering all your business information, so no need to provide that to me at this stage].* I will be preparing your financial statement to include your personal assets and debts.

To that end, can you please provide the following:

1. Last 3 pay cheque stubs or statement of income.
2. Last 3 years' tax returns.
3. Last 3 years' Notices of Assessment.

Please gather the following:

1. Any opinions regarding the value of a home you own.
2. Any opinions of value regarding investment properties.
3. Black Book value for vehicles.
4. Bank account statements for all bank accounts, including all non-registered investment accounts and TFSAs.
5. Pension statements, if applicable
6. Retirement assets (RSPs, LIRAs etc.).
7. Life insurance policies, showing beneficiary details.
8. Debts and liabilities, such as:
  - a. Mortgages;
  - b. Credit cards;
  - c. Lines of credit;
9. Do you have any other money owing to you?

If you'd like us to send you a secure link to upload the information, we'd be happy to do so.

**[link]**

If you have any questions or concerns, please do not hesitate to contact me.

## **Invoices**

Dear [Client],

Attached is your invoice with an outstanding balance of **\$TBD**

Additionally, we've requested a **\$TBD** retainer

**Total:\$TBD**

Kindly remit all payments to Resolve Dispute Resolution via **e-transfer** to [julia@resolvedr.com](mailto:julia@resolvedr.com)

***Please note this invoice is due upon receipt***

If you have any inquiries regarding your invoice, please do not hesitate to contact me.

Thank you and have a lovely day.

## **Testimonials**

We are building testimonials for our website, and we wondered if we could trouble you for an anonymous testimonial to include. It could be about your experience with Alexa/Victoria or Resolve, or anything you would be willing to share. A few sentences would suffice and we'd be most appreciative.

If you are not interested, absolutely no problem at all.

Lastly, if you have feedback to share, we're committed to constantly improving our client service and happy to hear anything that may help us be better!

Wishing you a lovely day,

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## **Cancellation policy – sent with every calendar confirmation**

**Due to limited scheduling availability, we request that you cancel or reschedule 24 hours before a scheduled meeting. If you cancel your appointment less than 24 hours before it is scheduled to take place, you will be subject to a charge. To avoid a cancellation fee, please provide cancellation notice at least 24 hours prior to your meeting.**

**You may cancel or reschedule an appointment by contacting Julia Fronduti at [julia@resolvedr.com](mailto:julia@resolvedr.com) or 416-767-1256 x3**

We sincerely appreciate your cooperation