

## How IDR Law deals with new case enquiries

Thank you for considering **IDR Law** as your legal representation in connection with your current difficult situation.

Most of the disputes we deal with are factually, emotionally and legally complex – at a time when much is unclear, we want to make sure that how we assess your action from here is absolutely transparent and the steps we will take are clear to you.



### Step one - initial contact with us - we listen

Whether you have found us on a Google search or been recommended to us by other organisations, the first thing we need to do is to get some basic facts and information from you.

That information will form the basis of our “fact find” – this will enable our legal team to make an initial assessment of your case. This fact find will take place over the telephone with our experienced client onboarding team, Laura Read (Head of Client Relations) and Daniela Parravano (Paralegal). Laura and Daniela will ensure that all the information we need is taken from you – this telephone call can take up to 30mins and will be led by Laura or Daniela, who know exactly what the legal team need to get an initial feel for the problem you face.

Once the fact find is completed, the onboarding team will confirm at the end of that initial call whether or not your case is a matter that IDR Law could deal with. If not, they will explain why and, where possible, give you pointers as to where to go/what to do next.

If it is a matter that IDR Law normally does deal with, your case will then be allocated to a legal team here. We have several legal teams here, all experts in this area of law and each led by a team leader. The onboarding team will make sure that your case is allocated to the team with the best capacity to respond to your enquiry quickly.



## Step two – case assessment by the legal team – we consider

Your allocated legal team leader will consider the fact find and case summary produced by the onboarding team and will essentially decide whether the matter is something that:

- (a) we can assist you with; or
- (b) is not something that is a viable case to run; or
- (c) is a matter that could have good prospects of success, but more investigation is required.

If the matter is considered not to have good prospects of success, you will be contacted by either the legal team or the onboarding team with confirmation of this and an explanation as to why your case is not one we can help with (usually due to the case having either insufficient legal merit or the estate/ value of the dispute being too low to make our representation commercially viable for you).

If the case has/could have merit, then a member of one of our legal team will make contact with you to discuss your case further, both in terms of merits and legal cost funding.

Usually, that legal team will retain your case from that point until conclusion but on occasion you may be allocated to an alternative legal team here – that most commonly happens when a case is urgent (so needs a team with lots of capacity available) or a particular team has had more experience of your type of dispute than the others. Whatever team is allocated, they will always be contentious probate experts and be supervised by a lawyer of at least Senior Associate status.



## Step three – discussion with legal team – we advise

During your conversation with your legal team, further information and enquiries will be followed up. The goal of the team at this stage is to work out what information/evidence is needed to enable an assessment to be made as to the strengths of your position and whether IDR Law can really help you achieve your goals. Sometimes, the information and evidence available at the outset is enough for the legal team to make that decision immediately – you will be informed of their views and if it is negative, given an explanation why. If the legal team consider your case to be one we can take on immediately, then they will offer a “full retainer” (see below). If further investigation is going to be required by the team before a decision can be made by the legal team, then they may offer you an “investigation retainer” (see below).

If the legal team decide, having spoken with you, that we cannot improve your position either because the claim has insufficient merit or is commercially unviable, then you will be informed at the end of that call and, where appropriate, informed where help can be secured elsewhere. If the team is happy to take on your case (either on a full or investigation basis) then you will be asked to confirm that you are happy for us to proceed to set out the terms of our representation and planned work going forward in a formal retainer.

Please note that if we confirm that we are unable to assist with your case at any point before either a full retainer or an investigation retainer is prepared, then we make no charge for the assistance given.



## Step four – formal retainer prepared – let's get started

As explained above, there are two types of retainers that IDR Law offers at the outset of cases. A full retainer is one offering representation going forward to the conclusion of your case. An investigation retainer is one offering representation in so far as gathering further evidence and information to then decide on the strengths of representing you to the conclusion of your case – the investigations may result in either a full retainer then being offered or, alternatively, advice that prospects are poor and that the case is not one we believe success can be achieved. It is common for cases to start with an investigation retainer and then on successful investigation, convert to a full retainer.

Your investigation or full retainer will be sent out to you and will contain the following information:

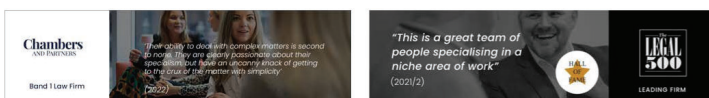
- details of your dispute issues
- confirmation of your objective in instructing us
- a breakdown of the phases of work we believe is necessary to achieve your objective
- an estimate of the min and max legal costs for each of those phases of work
- confirmation of what methods of case funding we can offer (please see our information sheet on funding options for more information on this)

Please note that if on receiving your retainer, you decide not to instruct us,, we do raise a minimal fee of £750 plus VAT to cover part of the time already invested in your case.

If the retainer is accepted by you (by signing it or simply emailing your agreement) then the initial work carried out on your matter and the time taken to produce the retainer will be included in the fee range estimate for phase one of the work set out in the retainer.



Once you confirm that our formal retainer is agreed (by email, returning your retainer signed or by speaking to us) we will get started on your case!



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