

## **File note precedent**

**Date:**

**Time:**

**Name of client:**

**Venue:**

**Telephone from\*:**

**Telephone to\*:**

**Conference with\*:**

**Identification of parties (e.g., clients present and accountant(s) involved):**

**Substance of conversation/discussion (use additional pages where required):**

**Actions to be taken – by when/by whom:**

**Signature of person preparing file note:**

*\* Strike out if not applicable*