

Attendance note template

One note per call or meeting. Write it the same day, and keep it on the matter file.

Client and matter Client name, matter description and reference	
Date, time and length For example 05/10/2026, 10.30, 25 minutes	
Type Phone call, video call, meeting in person	
Who attended Names and roles, including anyone with the client	
What the client told us The facts and concerns they raised, in their words where it matters	
Advice given What was advised, the options discussed and any risks explained	
Instructions received What the client asked you to do, and anything they decided	
Documents seen or to be sent What was looked at, handed over or promised	
Next steps Who does what, and by when	
Time to record The time spent, and the narrative for the bill	
Written by Name, role and the date the note was written	