

CanopyMetrics

CONSULTATION PREPARATION CHECKLIST

Gather these details before submitting your structured intake.

What to have ready

A clear record helps us understand the matter, check conflicts, and prepare for an efficient intake call. No privileged detail is required at this stage.

- ☐ **Matter summary & deadlines**
Key facts, parties, requested service, and any filing, report, or disclosure dates.
- ☐ **Property/site address & jurisdiction**
The full site address, court, county, agency, or other governing jurisdiction.
- ☐ **Tree & damage photographs**
Dated wide and close views of tree condition, damage, structures, and the surrounding site.
- ☐ **Prior arborist or inspection records**
Existing reports, estimates, emergency assessments, and expert opinions.
- ☐ **Permits or surveys**
Tree-removal permits, site plans, boundary surveys, construction drawings, or related notices.
- ☐ **Maintenance & correspondence**
Invoices, pruning or removal history, insurer or carrier letters, and relevant communications.
- ☐ **Preserve the site**
When safe, avoid removal, cleanup, or major trimming; preserve original photos and site materials.

A note on preserving evidence

If the tree or damage presents an immediate safety concern, address the hazard first. Otherwise, document the original condition before removal or major trimming and keep copies of the original files.