

Consent and retainer language (consulting firms)

Insert into your service agreement or a standalone consent form. Have counsel adapt this to your practice. Checkboxes must **not** be pre-checked. For sensitive information in Québec, consent must be **express**, specific, and requested in clear language, separately from unrelated terms where practicable.

Firm: [legal name]

Client: [name]

A. Professional services (always)

- ☐ I understand that [**Firm name**] is my immigration consultant / representative. **Yuzu Solutions Inc.** only provides software that the firm uses. Yuzu does not advise me and is not a party to this retainer.
- ☐ I consent to [Firm name] collecting, using, and storing my personal information — including **sensitive** information such as identity documents, immigration history, and questionnaire answers — to provide the services described in the retainer, to contact me, to book appointments, and to meet professional and legal duties.
- ☐ I consent to this information being entered into **Dossierly** (Yuzu Solutions Inc.), with primary storage in Canada, and to the technical providers described in the firm's privacy notice (hosting, email, and any calendar or payment tool the firm uses).

B. Family members / children (if applicable)

- ☐ I am authorized to provide information about the following family members: [names].
- ☐ For each child **under 14**, I am a parent or guardian (or otherwise authorized by law) and I consent to the collection of that child's information for this file.

C. Optional tools (check only if the firm will use them for this client)

- ☐ Calendar / video meeting (Google, Microsoft, or Zoom): I consent to my name, email, phone, and appointment time being sent to that provider to create the event or meeting.
- ☐ Payment processing (e.g. Square): I consent to payment details being processed by that provider to charge the fees I agree to.

D. Extra-Québec processing (recommended for Québec clients)

- ☐ I understand that some providers may process information **outside Québec**, including the United States, as explained in the firm's privacy notice, and I agree to that communication for the purposes above.

E. How to refuse or withdraw

I may refuse a checkbox. The firm may then be unable to offer the related service. I may withdraw consent by writing to [firm email], subject to the six-year closed-file hold and other legal duties.

Signature: _____ Date: _____

Short in-product notice (already used by Yuzu)

Dossierly already requires clients to accept Yuzu's Privacy Policy and Terms on the client portal and booking. **That does not replace** this firm-level consent for your professional relationship. Keep this form in the paper or PDF retainer file.