

About the Law Society

Licensing & Membership

Regulation & Insurance

Practice Support

Publications & Forms

Public

Media

The Law Society  
of British Columbia



## Practice Support Practice Resources

Resources are divided by subject matter:

- Client identification and verification
  - Confidentiality / privacy / conflict of interest
  - Technology
    - Pacific Legal Technology Conference
  - Client service / communication
  - Financial institutions
    - Mortgage discharges
    - Cheques and bank drafts
  - Practice
    - Incorporation precedents
    - Model letters
    - Practice Checklists Manual
    - Legal fees (Retainer agreements, Statutory Declaration re PST)
    - Solicitor's liens
    - **Western Law Societies Conveyancing Protocol**
- Legal research
- Office organization (including Model Policies)
- Marketing
- Succession Planning
- Leaving or moving your practice
- Personal assistance
- Protocols between Law Society and courts on complaints
- Protocols between Law Society and the Province of BC

### For other resources, see:

- Insurance – Risk Management
- Publications & Forms
- PLTC Practice Material
- Succession Planning
- Locums

- Home
- Search
- Lawyer Lookup
- What's New
- Calendar
- Legal Resources
- Feedback

### Member Log in

Log in for member resources, CPD and online courses.

Surname:

Member #:

[Guest log in](#) to Online Courses.

**Articling Registry**  
click here to login

### Client identification and verification

[Client Identification and Verification Checklist](#)

[Explanatory notes and frequently asked questions](#) [updated March 2009]

[Client Identification and Verification Online Course](#)

### Confidentiality / privacy / conflict of interest

"Data Theft or Loss: Ten things your lawyer must tell you about handling information" (PDF) by Craig Bavis and Michael Parent for *Ivey Business Journal*. Published here with permission.

[Confidentiality agreement](#)

[Lawyers Sharing Space](#) (PDF)

[Model conflicts of interest checklist](#) [updated March 2009]

[Model Independent Legal Advice Checklist](#) (PDF) [updated April 2009]

[Two Exceptions to a Lawyer's Duty of Confidentiality: The Right to Reveal Confidential Information in Defence of Reputation and in Pursuit of Fees](#) (PDF)

[What Can Lawyers Say in Public?](#) (PDF)

### Technology

[Mastering your Mailbox: E-mail and Information Management](#) (PDF: 938 KB)

[List of companies offering accounting or case management packages](#) (Excel spreadsheet)

<a href="#">Pacific Legal Technology Conference materials</a>
<a href="#">25 Benefits of Case Management in 40 Minutes</a>
<a href="#">Building an automated practice: it's not so tough</a> (PDF)
<a href="#">Federation of Law Societies of Canada: Ethics and the New Technology</a>
<a href="#">Internet / e-mail use policy</a>
<a href="#">Nimda Virus Update: You are more vulnerable than you were a week ago</a>
<a href="#">Practice Management Face-Off: <i>Time Matters vs. Amicus Attorney</i></a> (Large PDF: 2.9 MB)
<a href="#">Running a Home Business on the Office Server (and other good reasons to have a Technical Use Policy)</a> (PDF)
<a href="#">Threats from Within</a> (PDF)
<a href="#">Trust Accounting and Case Management Technology</a> (PDF)
<b>Client service / communications</b>
<a href="#">Model Client Survey</a>
<b>Financial institutions</b> [For more information on the Financial institutions section, contact Practice Advisor Barbara Buchanan at 604-697-5816 or <a href="mailto:bbuchanan@lsbc.org">bbuchanan@lsbc.org</a> .]
<b>Mortgage discharges:</b>
<ul style="list-style-type: none"> <li>• <a href="#">Guidelines for Solicitors to Facilitate Discharging or Transfer of Mortgages</a>, the Canadian Bankers Association (PDF)</li> <li>• <a href="#">Contact List for Matters Involving Mortgage Discharges</a>, the Canadian Bankers Association, March 2009 (PDF)</li> </ul>
<b>Cheques and bank drafts:</b>
<ul style="list-style-type: none"> <li>• <a href="#">Lost and Stolen Cheques, Bank Drafts and Trust Cheques: some modest but partial solutions</a>, <i>The Advocate</i>, March 2009 (PDF)</li> </ul>
<b>Practice</b>
<b>Incorporation precedents:</b>
<ul style="list-style-type: none"> <li>• <a href="#">Checklist for Incorporation</a> (PDF)</li> <li>• <a href="#">A Comparative Study of Business Structures Used by Professionals</a> (PDF)</li> <li>• <a href="#">Articles of John Smith Law Corporation</a></li> <li>• <a href="#">Incorporation Agreement: John Smith Law Corporation</a></li> <li>• <a href="#">Business Relationships within the Professions: Selected Business and Legal Issues</a> (PDF)</li> </ul>
<b>Model letters:*</b>
<ul style="list-style-type: none"> <li>• <a href="#">Letters to client – Termination of Employment</a></li> <li>• <a href="#">Reporting Letter – Family Law</a></li> <li>• <a href="#">Reporting Letter – Initial Letter to Purchasers</a></li> <li>• <a href="#">Reporting Letter – Incorporation of a Company</a></li> <li>• <a href="#">Reporting Letter – Wills</a></li> <li>• <a href="#">Reporting Letter to Client – Closing a File</a></li> <li>• <a href="#">Non-Engagement Letters</a></li> <li>• <a href="#">Remitting Interest to the Law Foundation</a></li> <li>• <a href="#">Canada Deposit Insurance Corporation Report</a></li> </ul>
<a href="#">* Notes on Using Model Letters and Agreements</a>
<b>Practice Checklists Manual</b>

## Legal fees

- Retainer agreements:
  - [General](#) [updated March 2009]
  - [General \(short version\)](#) [updated March 2009]
  - [Personal Injury \(Hourly Fee\)](#)
  - [Personal Injury \(Contingent Fee\)](#) [updated March 2009]
  - [Criminal Law \(Paying Client\)](#)
  - [Administration of Estates \(Grant of Letters of Administration\)](#)
  - [Administration of Estates \(Grant of Probate\)](#)
  - [Family Law](#)
- A Statutory Declaration for low-income clients who are claiming exemption from payment of PST on legal fees is available on the BC Ministry of Small Business and Revenue website. See *Social Service Tax Act* - Tax on Legal Services [Statutory Declaration](#).

## Solicitor's liens

- [Getting Paid: Asserting and Defending a Solicitor's Lien](#) (PDF), *The Advocate*, January 1997. (Note: *Must* be read in conjunction with "Charging Liens — 2005 update.")
- [Charging Liens — 2005 update](#) (PDF). (Note: Should be read in conjunction with "Getting Paid: Asserting and Defending a Solicitor's Lien.")

## Western Law Societies Conveyancing Protocol (British Columbia) – Version 3

- [Full text of the Protocol – Version 3](#)
- [Solicitor's Opinion – Version 9](#)
- **Examples:**
  - [Wording for use when acting for the borrower and lender](#)
  - [Wording for use when acting for the lender only](#)
  - [File checklist](#)
  - [Statutory declaration regarding existing survey certificate](#)
  - [Letter from law firm confirming the participation of a financial institution](#)
- [Reference materials, brochures, websites and contact list](#)
- [List of Protocol Lenders](#) (PDF: 32 KB)

## Legal research

Canadian legal source materials (links):

- [Canadian Legal Information Institute \(CanLII\)](#)
- [BC Courthouse Library Society](#)
- [Best Guide to Canadian Legal Research](#)

## Office organization

Examples of cheque requisition forms:

- [Trust Cheque Requisition](#) (PDF) **New**
- [General Cheque Deposit / Requisition](#) (PDF) **New**

[Lawyer Guide to Working Effectively With a Bookkeeper](#)

[Valuable Property Record](#) (PDF)

[List of companies offering accounting or case management packages](#) (Excel spreadsheet)

[Resource Guide for Lawyers with Disabilities and Employers](#) (PDF)

[Business Plan Outline](#)

[Twelve-Month Law Practice Cash Flow Budget Worksheet](#) (Excel spreadsheet)

[Whose File is it Anyway? Who Owns Client File Documents when the Retainer Ends](#), *The Advocate*, January, 1994 (PDF)

[Closed Files: Retention and Disposition](#) (PDF)

[Getting Started: \*Trust Accounting\*](#) [updated August, 2005] (PDF)

[Getting Started: \*Opening Your Law Office\*](#) [updated September, 2004] (PDF)

[Loss Prevention Planning Checklist](#)

Model policies:

- [Flexible Work Arrangements](#)
- [Guidelines – Recruiting, Interviewing and Hiring Practices](#)
- [Pregnancy and Parental Leave](#)
- [Privacy Policy](#)
- [Privacy Policy for Employees of a Law Firm](#)
- [Respectful Language Guideline](#)
- [Workplace Accommodation](#)
- [Workplace Equality](#)
- [Workplace Harassment](#)

[Opening and Maintaining Client Files](#) (PDF)

[Sample Associate Agreement](#)

### Marketing

[10 of the Most Common Lawyer Marketing Mistakes — and How to Prevent These From the Get-Go!](#) (PDF: 189 KB)

[Marketing Tips, Techniques and Technology: The Keys to Satisfied Clients](#) (PDF)

### Succession planning

(see also: [Succession Planning webpage](#))

[Planning Ahead: A Guide to Protecting Your Clients' Interest in the Event of Your Disability or Death. A Handbook and Forms](#), by Barbara S. Fishleder, Oregon State Bar Professional Liability Fund, 2006.

### Leaving or moving your practice

[Winding Down the Law Practice : Planning for Retirement](#), a paper by the New York State Bar Association (PDF: 1.31 MB)

[Winding up a Firm: A Checklist](#) (PDF)

[Winding up a Sole Practice: A Checklist](#) [updated June 2007] (PDF)

[Model letters to client: Termination of Employment](#)

[Withdrawal from the Practice of Law: sample newspaper notice and letter to clients](#)

### Personal assistance

[Resource Guide for Lawyers with Disabilities and Employers](#) (PDF)

[Laughter & Living: The Lawyer's Personal Toolbox](#) (PDF)

### Protocols between Law Society and courts on complaints

[Protocol between the Provincial Court and the Law Society respecting complaints \(2004\) | Addendum \(2005\)](#)

[Protocol between the Law Society and the BC courts respecting concerns that arise in ongoing proceedings \(1997\)](#)

See also: [Report of the Committee on Relations with the Judiciary](#) (PDF)

### Protocols between Law Society and the Province of BC

[Protocol between the Law Society and the Office of the Registrar respecting the protection of solicitor-client privilege in connection with investigations under the \*Security Services Act\* \(2008\)](#)

[\[Top of page\]](#)

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