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## Tips for the Home Office Lawyer

### 1. Preliminaries

- Consider whether your practice really is suitable for a home office
- Check municipal zoning to make sure a home law office is a permitted use
- If you are in a condo or apartment, check the rules on home law offices

### 2. Get separate phone and fax lines for your law business

- Put a separate voice mail service on your business phone line so you can send the message that there are times when you are not available for business even though you are home
- Don't list your home number and don't give it to clients
- Use a beeper for emergencies rather than giving out your home number
- Train the other people who live in the house how to take a message in case a client calls your home number by mistake

### 3. Put your office in a separate room

- Keep your files and administrative records in this room and lock your office when you are not working in it
- If you have to store any of your files or records outside this room, make sure they are kept in locked cabinets
- Train the other people who live with you to understand that this is private business space and not part of the common use area of the home

### 4. Furnish and equip your office

- Get a good, ergonomically designed chair—you're going to spend a lot of time in it
- Locate your computer thoughtfully—you're going to spend a lot of time in front of it
- Locate your phone, fax machine, printer, scanner, copier, etc. conveniently

### 5. Arrange to rent a meeting room in a law office, executive suite or other business location on a regular or ad hoc basis so you don't have to see clients at home

### 6. If you are going to see clients in your home office,

- Locate your office as far away as possible from sources of domestic noise and odour
- If possible, your office should have access to the outdoors so clients do not have to go through your living space (may require renovations)
- If possible, this room should have access to separate bathroom facilities and a waiting area (may require renovations)
- Determine your obligations with respect to access by disabled persons (may require renovations)

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- Do not let domestic objects and messiness invade your office (any sign that leads a client to think that this is not a place of business will degrade the perceived value of your services)
- Dress with appropriate formality when you are seeing clients—look like a lawyer

#### 7. Security issues: if you will be seeing clients in your home office,

- Screen your clients carefully
  - Arrange to meet new clients outside your home office (e.g. at their business premises, in a restaurant or coffee shop, at the courthouse or in a law office, executive suite or other business location where you have made arrangements to use a meeting room) until you are satisfied they don't pose a risk
  - Verify the client's name, address and telephone information; if the client is a business, check it out to make sure it is legitimate and above board
  - If you have any reservations about the stability of a new or existing client, decline the case or terminate the representation rather than risking your family's safety
  - Make it clear to clients in the first meeting and in your engagement letter that they are not to come to your home unannounced under any circumstances
- Get a permanent post office box or use a commercial mailbox service
  - Use the box number as your business address on cards, letterhead, etc. so you have some control over information about where you live
  - You can arrange for a commercial mailbox service to accept deliveries on your behalf and even phone or email you when deliveries arrive
- Put an intercom between your office and the kitchen in case you need to call for help
  - Train your children what to do in an emergency (call 911 or a trusted adult)
- Consider a home security system with a 'panic button' that will set off an alarm and/or call the police automatically

#### 8. Get a separate computer for your law business

- Put password protection on this computer so only you can access it
- Train the other people who live with you to understand that this is your private business computer and not one they share

#### 9. Clearly set boundaries between your work life and your personal life

- When you are engaged in personal activities, direct business calls to voice mail
- Do not let business calls ring in the personal area of your home
- When you do legal work for family members or friends, meet them in your office, not in your kitchen or living room

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- When they see you in your professional space acting as their lawyer, they will be better able to refer you to their friends and relatives
- When you see them in your professional lawyer space, you will be better able to maintain your professional objectivity

**10.** Explain your "rules" about business hours and procedures in the initial interview and put them in writing in your engagement letter

**11.** Technology: don't scrimp just because this is a home office

- A high quality, fast, reliable computer with plenty of RAM and HD space and a large, bright, flicker-free monitor
- Current software for
  - Word processing
  - Accounting, including trust, time and billing, general ledger and financial management
  - Case management (client and file information, calendar information, etc.)
  - Other software needed for your practice
- High-speed Internet connection separate from your phone lines
- A high quality, high volume, office-quality laser printer, particularly if you will be doing a paper-based practice
- A high quality, high volume, office-quality FAX machine
- Photocopier
  - If you are in a paper-intensive practice, you should invest in a high quality, high volume, office-quality photocopier with a document feeder and sorter
- Scanner
  - Again, if you are in a paper-intensive practice, you should invest in a high quality, high volume, office-quality scanner with a document feeder
- Note: You may have to upgrade your electrical service to handle the power needs of your technology

**12.** Check out your insurance coverage

- Note: The normal homeowners policy is usually not adequate: consider public liability, fire and other damage, theft, valuable papers, loss of computer information, business interruption, disability and office expenses coverage

**13.** Check out the Income Tax Act and talk to your accountant about the special rules that apply to deductions for home office expenses

**14.** Services

- Arrange for a courier and court runner services that understand your needs
- Open your bank accounts in a bank that understands your needs
- Establish a good relationship with a technology consultant
- Have one or more experienced, competent legal secretaries on call for emergency document production or other paralegal services

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## 15. Set and keep regular work hours

- You need a regular start time so you don't get side-tracked with domestic chores when you should be doing legal work
  - Be flexible—one of the advantages of working from a home office is that you can take time out to go to the school and help out; just don't let non-work activities become excuses for procrastination
- You also need a regular quitting time so you don't work endlessly and so your clients realize that there are times when you are at home but not working
- Regular hours will also let your family know when you are working and when you are not

## 16. Set aside regular time for administrative work

- After all, you are running a professional services business

## 17. Don't let yourself get isolated

- Make sure you get out of the house and mingle with your professional peers regularly
  - Join CBA sections and go to the lunches
  - Go to LESA seminars
  - Join or start a support group of home office lawyers and meet regularly
- Set up an informal mentor network consisting of lawyers in firms and other home office lawyers
- Set up a "virtual law firm" of trusted lawyers to whom you can refer work you don't want to do yourself

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