



Tips for the Home Office Lawyer

1. Preliminaries:
 - Consider whether your practice 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:
 - Obtain a separate phone line for your business.
 - Don't provide your personal number to clients.
3. Create a separate office space:
 - Maintain client confidentiality by keeping physical files stored away and locked when you are not in the office.
 - Set boundaries with the other people who live with you so they 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, 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 the main areas of your home to decrease noise;
 - if possible, make your office accessible to the outdoors so clients do not have to go through your living space (may require renovations);
 - if possible, ensure your clients have access to a separate bathroom (may require renovations);
 - consider accessibility issues and determine your obligations with respect to access by persons experiencing a disability (may require renovations); and
 - do not let the messiness of your house invade your office space (any sign that leads a client to think that this is not a place of business will degrade the perceived value of your services).
7. Dress with appropriate formality when you are seeing clients.
8. 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, 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.
 - Properly identify and verify your clients pursuant to the [Rules of the Law Society of Alberta](#).

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- If you have any reservations about a new or existing client, decline the case or terminate the representation.
 - Make it clear to clients in the first meeting and provide clear expectations that they are not to come to your home unannounced under any circumstance.
 - Obtain a separate post office box or use a mailbox service:
 - Use the box number as your business address on cards, letterhead, email signature line, 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.
 - Consider a home security system with a 'panic button' that will set off an alarm and/or call the police automatically.
- 9. Get a separate computer for your law business:**
- Put password protection on this computer so only you can access it.
 - Confirm with the people who live with you to understand that this is your private business computer and not one they can use.
- 10. 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.
- 11. Set your expectations about business hours and procedures in the initial client interview and also put them in writing in your engagement letter.**
- 12. You will need to invest in technology, including:¹**
- 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.); and
 - other software or applications 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;
 - high quality, high volume, office-quality fax, photocopier and scanner machines, or an all-in-one or "multifunction" printer; and
 - if you are in a paper-intensive practice, you should invest in a high quality, high volume, office-quality machine.
- 13. Check out your insurance coverage:**
- Consider public liability, fire and other damage, theft, valuable papers, loss of computer information, business interruption, disability and office expenses coverage.

¹ Note: You may have to upgrade your electrical service to handle the power needs of your technology.



14. Review the *Income Tax Act* and talk to your accountant about the special rules that apply to deductions for home office expenses.
15. Services:
 - Arrange for 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 assistants on call for emergency document production or other paralegal services.
16. 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.
 - But 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.
17. Set aside regular time for administrative work – after all, you are running a professional services business.
18. Don't let yourself get isolated:
 - Make sure you get out of the house and mingle with your professional peers regularly. For example, consider:
 - joining CBA sections and go to the lunches;
 - going to LESA seminars; and
 - joining or starting 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, or participate in one of the [Law Society's mentorship programs](#).
 - Set up a "virtual law firm" of trusted lawyers to whom you can refer to.

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