

Practice 'Snapshot'

Name: _____

Date: _____

Because no two professional settings are the same, it would be helpful if you would outline your practice and the management systems you use to keep it running efficiently, ethically and profitably. Feel free to add comments or additional pages of explanation.

THE BUSINESS OF PRACTICING LAW

1. How many active files do you have, broken down by area of law (litigation, corporate, family, etc.) and complexity (simple, average, complex)?

2. Are your government files (GST, personal and corporate income tax installments, payroll remittances) up to date? How much is in arrears.

3. Who looks after your accounting records? What is their level of experience?

The information provided in this form will be used by the Law Society of Alberta for one or more purposes contemplated by the *Legal Profession Act*, the Rules of the Law Society, the Code of Conduct, or a resolution of the Benchers and will be accessible to all departments of the Law Society, including the Alberta Lawyers Insurance Association. The information may be used or disclosed by the Law Society of Alberta, now or in the future, for regulatory purposes, including Law Society of Alberta investigations and proceedings. We may contact you to obtain additional information, or to obtain clarification on the information you provided. Should you have any questions about this, please contact the Privacy Officer at 403-229-4700.

4. Do they keep your accounting records on their computer, your computer or is your accounting done manually?

5. Are your accounting records up to date? What is missing?

6. Are your firm's annual trust safety filings (Self-Report and Accountant's Report or Electronic Upload) current with the Law Society?

MANAGING YOUR PRACTICE

7. What practice management software are you using (Clio, Cosmolex, Rocket Matter, etc.)?

8. How many civil or criminal Legal Aid files do you have?

9. Do you have support staff? How many, what are their positions and levels of experience?

10. What kind of diary system do you use? Who is responsible for entering and retrieving that information?

11. What is your plan in case a staff member leaves or is ill for an extended period of time.

12. What is your plan in case you are away for extended illness, short or long term disability (written contingency plan agreement with another lawyer, arrangements with your bank and the Law Society for an alternate signatory for your trust account, etc.)? How are you protecting your clients and who will run your practice?

13. Do you have someone to pass files to or discuss files with? When was the last time the two of you spoke about a file?

14. How do you deal with difficult clients and difficult files?

PROFESSIONAL DEVELOPMENT

15. How much do you spend in an average year on professional development? Which seminars and conferences did you attend last year? What are you doing to meet your professional development goals this year?

16. What legal professional organizations do you belong to and in what capacity (member, committee member, director, executive)? How many meetings did you attend in person last year?

PERSONAL GOALS

17. What do you most enjoy about practicing law?

18. What does a typical work week look like for you? How many hours do you work on average? How often do you work past 9pm? How many times last month did you work one or both days of the weekend?

19. When and how long was your last vacation?

20. Where and what would you like to be practicing five years from now? What steps are you taking to make that happen?

21. How long would you like to continue practicing? What have you done, personally and professionally, to prepare for the transition to retirement when the time comes?

22. Do you have any medical conditions that impact your practice?

ANYTHING ELSE

23. Is there anything else we can help you with?