

PracticePRO

LAWPRO's PracticePRO program provides risk management, claims prevention and law practice management information for lawyers in Ontario and beyond. Our resources, precedents and checklists help lawyers take proactive steps to avoid errors and omissions claims, and help grow successful and thriving practices.

In 2024, practicePRO developed new CPDs, charts, and checklists to address the issues of the day.

Virtual ID

In response to the Law Society of Ontario's requirements around virtual identification, LAWPRO invited companies listed on the Digital Identification and Authentication Council of Canada directory, along with other known vendors, to provide information about the service they provide including costs, onboarding time, turnaround time, process, and privacy. The vendors completed a survey and provided self-asserted information. The responses were included in our Virtual Identity Verification (IDV) service Provider Chart.

Visit practicepro.ca to access all our free resources.

An area with growing claims

Practice tips for wills and estates lawyers CPD

This program brought together leading practitioners, including LAWPRO senior claims counsel, to provide key tips and explore some of the leading cause of claims in the area of wills & estates. Covering content of particular interest to wills & estates solicitors, the panel discussed topics such as discovering assets and liabilities when will-drafting, avoiding conflict-of-interest hazards when working with joint retainers, flagging capacity concerns, and issues surrounding minors and defendants.

In September, PracticePRO launched the second video in the "Area of Law" series, this time focusing on Wills & Estates claims. The video delves into the top causes of claims in this field, insightful claim stories from our Claims Counsel, and practical strategies to minimize liability risks.

A focus on fraud

The confidence client – survival tips to prevent fraud

Cybercrime targeting lawyers continues to get increasingly more sophisticated, and this issue of LAWPRO Magazine featured a discussion on the many ways fraudsters can target lawyers, as well an article explaining how social engineering frauds work and how client portals can improve security for clients and firms.

How to ensure you have secure funds

A common question among lawyers is when can they be certain that money deposited into their trust accounts is secure. Ray Leclair provided an overview of how payments are handled by Canadian financial institutions, and when funds can truly be considered "irrevocable".



Social engineering – what is it?

To assist lawyers in understanding the necessary steps for extending social engineering fraud coverage, we developed a comprehensive social engineering toolkit, which has generated 2,624 visits as of the end of October. This toolkit includes a detailed instructional video available on LAWPRO's YouTube channel, sample retainer language, and a dedicated FAQ page.

Real estate questions answered

Unlocking real estate wisdom CPD

This program summarized recent legislative developments impacting the industry, and ID verification rules and procedures, the CRA's new trust reporting rules, legal advice for bare trustees, and essential tax considerations impacting real estate practitioners.

Residential real estate tax considerations checklist

This checklist was designed to navigate the complex landscape of tax-related issues real estate lawyers need to consider when representing buyers and sellers.

Real estate due diligence: NOSIs, easements, fraud and common electronic registration issues

This program provided a refresher on title searching, fraud, and electronic registrations. It covered critical updates to Notices of Security Interests (NOSIs) and their impact on due diligence requirements. There were also practical tips from TitlePLUS on avoiding current fraud threats and common title issues involving registered easements and restrictive covenants, and Ontario's Director of Titles gave insights on avoiding returns for correction and correcting common registration errors.

How demographics are affecting the profession

LAWPRO magazine – time for tomorrow

This issue focused on issues of an aging demographic of both lawyers and clients, featuring a discussion on how a population that is getting older will impact the practice of wills and estates law. As well there are tips on retirement and succession planning for lawyers, and a case study of how time mismanagement and a delayed will resulted in a claim.

September – time to declare risk management credits

LAWPRO approved 134 programs as eligible for the risk management credit.

The Credit is designed to help lawyers hone their legal skills, learn new strategies and techniques, reduce their exposure to claims, and lower their insurance premiums

To encourage participation in CPD programs that include risk management content, LAWPRO offers a \$50 premium credit (to a maximum of \$100) for each qualifying program completed by mid-September. The maximum \$100 credit is applied to next year's insurance premium.

In 2024, 11,159 credits were claimed by Ontario lawyers.

Successful practice management

What they didn't teach you in law school: marketing, management and mentorship

This CPD focused on the essential skills that law school didn't cover. It included practical management tips, including how to manage up and navigate challenges in a multi-generational workplace. It emphasized the development of key skills and the importance of building strong peer and mentor relationships, while offering guidance on how to maximize the benefits of the Coach and Advisor Network program.

When ILA isn't ILA

It is important that lawyers understand the difference between ILA and traditional legal representation, and know when ILA is appropriate and when it is not. This article used a claims case study to explain when a lawyer should avoid acting beyond the scope of the retainer.

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