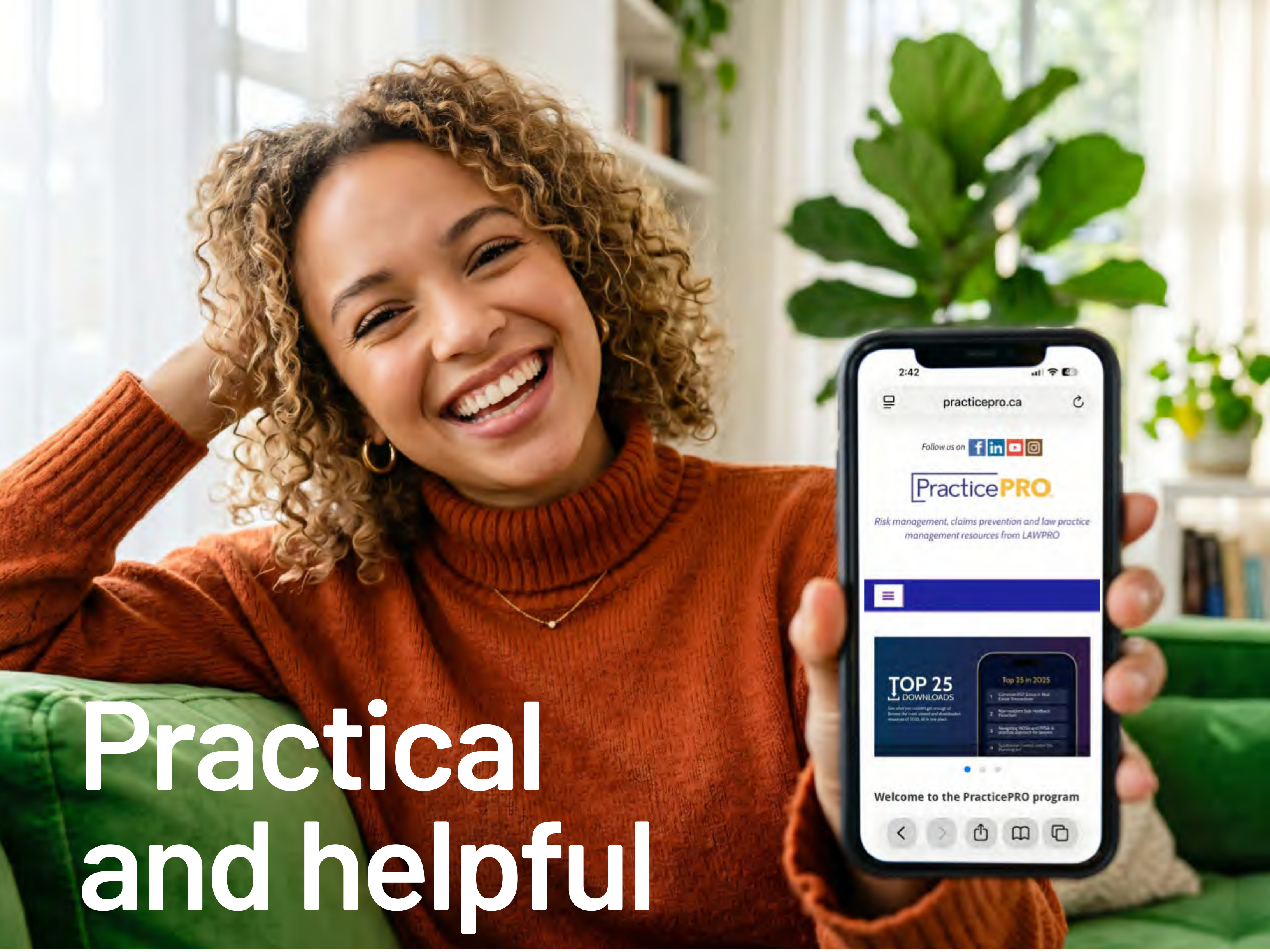

Practical and helpful

PracticePRO

checklists, precedents, and resources available at **practicepro.ca**

1 Retainer agreement precedents: One of the best ways to reduce the risk of a claim is a retainer agreement that clearly identifies the client and the scope of work to be done. We have a variety of retainer agreement precedents for different types of matters which you can adapt for your practice.

2 Limitations period charts: The Limitations Act, 2002 represented a huge reform of the existing law of limitations. We continue to see claims related to lawyers' unfamiliarity with the limitations rules or failing to consider a possible action until it's too late. Take the time to review these charts and avoid a claim related to a missed deadline.

3 **Undertakings checklist:** Giving an undertaking should not be taken lightly. If the terms and conditions of the undertaking are not properly considered and documented, several issues can arise after an undertaking is given. Use our online checklist to help you avoid potential issues.

4 **Post-matter client service survey**: What did your clients think of your service? Use this post-matter client service survey to find out.

5 **Generic independent legal advice (ILA) checklist:** A hasty $150 ILA consult can easily lead to a claim and a $5,000 deductible. Use the ILA checklist to make sure you cover all the bases when giving independent legal advice.

6 **Domestic contract matter toolkit:** This toolkit helps lawyers systematically consider and discuss all relevant information at the initial interview and signing of a domestic contract. It includes an intake form, an intake checklist, a post-meeting client assignment form, and a review and signing checklist.

7 **Commercial transaction checklist:** This checklist contains a series of questions lawyers should ask themselves to help ensure that the commercial documents they are drafting correctly reflect the client's instructions and expected results. It helps ensure that your communication with the client has been thorough, too.

8 **Fraud fact sheets:** These pamphlets describe cybercrime and bad cheque fraud scams, and frauds targeting real estate lawyers. They list the "red flags" that indicate that an otherwise legitimate looking matter is actually a fraud. Share this with your staff too!

9 **Technology:** From virtual identity verification and video conferencing to AI and tech products to help you practise more effectively, our articles and resources will help you navigate technology and the law.

10 **Client trial preparation checklist:** Prepare your client for the ups and downs of trial with this customizable checklist, which covers various topics to discuss with your client, including process, timing, outcomes, risks, and costs.

11 **Real estate reources:** Even the most routine real estate transaction has many steps; the details may seem obvious but it is easy to let one or two slip through the cracks. These resources can be valuable risk management tools: Real Estate File Management Checklist, Non-resident Sale Holdback Flowchart, Residential Real Estate Tax Considerations Checklist, Questions about HST to ask yourself when handling a real estate transaction, and Using Title Insurance Safely Checklist.