

**Summary of Results on 1995 Workshop on Checklists
1996 Real Estate Conference and Workshop
Presented by CLE and RELANS
Friday, April 12, 1996**

For those of you who did not take part in last year's conference, and as a refresher for those of you who did, we started from the premise that checklists are a very important part of the daily routine of the property practitioner. To be effective, they must be user-friendly and the lawyer, secretary and property paralegal must each understand how the checklists are to be used with regard to their respective roles in the delivery of service to the client. Each lawyer will use the checklists differently. The checklists contained in the 1995 materials are by no means definitive, but they were a good starting point and the 1995 workshop has resulted in further progress and improvements.

We would like to thank those of you who took part in the 1995 workshop on checklists. Special thanks are extended to the group leaders who put into writing the collective response from each work group to the questions asked during the workshop and who also put into writing the collective review from each work group for the checklists covered in the time allotted.

The overwhelming consensus was that there was not enough time to effectively review the materials in the 1995 workshop binder. However, the results obtained were useful and the summary is as follows:

1. The process of using a Basic Checklist with detailed Sub-checklists and Specialized Checklists using the "buzzwords" in "bullet" style was determined to be a good idea and very effective especially when used in conjunction with a separate, detailed file opening sheet.
2. The detailed checklist which attempts to cover every issue and nuance of property law on one page is not practical, useful or effective in today's property practice.
3. It is definitely worthwhile to note the relevant legislation, cases, articles and papers on the Specialized checklists themselves.
4. It is important to coordinate and adapt the checklists with the standards and protocol regarding property law as they evolve in the Province of Nova Scotia.

During your workshop, your group leaders will take you through an example of how this system works for the purchase of new home construction.

(Group leaders will then go through these four steps and hand to each group member a copy of the file checklist)

1. Review the Pre-Agreement of Purchase and Sale checklist (p. 10 of the 1995 workshop material).
2. Completion of a detailed Client Intake Sheet containing the information noted on the Client Intake Sheet Checklist (p. 9 of the 1995 workshop material) and completion of sub-checklists and specialized checklists as required.
3. Review the Purchase of New Home Construction checklist (p. 2 of the 1995 workshop material).
4. Completion of the Purchase file checklist with special instructions noted.

I hope that this exercise proves to be useful and I look forward to reviewing your questions, comments and criticisms.

Happy Conveyancing!

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