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# Law Office Management Standards

LIANS » Standards » Law Office Management Standards

Constituted in early 2012, the formal mandate of the Professional Standards (Law Office Management) Committee as approved by Council of the Nova Scotia Barristers' Society is as follows:

*The Law Office Management Standards Committee supports Council in the governance of the Society for its purpose of protecting the public interest and the practice of law by developing professional standards for the management of law offices in Nova Scotia.*

These Standards and their featured resources are intended to be an articulation of the existing statutory and regulatory obligations for lawyers and to provide some guidance with respect to “how” a Standard might be met, taking into account the variances in practice around the province. Each proposed new Standard is first introduced to Council by the Professional Standards (Law Office Management) Committee and then communicated to the membership for review and consultation. After that process is complete, it is brought back to Council for approval and finally made fully available to lawyers through this website.

**Note:** *New Standard 'Record Retention and Maintenance of Electronic Data' was previously LOMC Standards Record Retention & Maintenance and Backup of* 

*Electronic Data, merged February 27, 2026.*

- [Record Retention and Maintenance of Electronic Data](#)
- [Client Service and Communication](#)
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## Standards

- ▶ Family Law Standards
- ▶ Real Estate Standards
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- ▶ Criminal Law Standards
- ▶ Wills, Powers of Attorney, and Personal Directives Standards



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# Record Retention And Maintenance Of Electronic Data

LIANS » Standards » Law Office Management Standards » Record Retention and Maintenance of Electronic Data

## Standard

*[previously LOMC Standard Record Retention & LOMC Standard Maintenance and Backup of Electronic Data, merged February 27, 2026]*

Lawyers are responsible for the storage, maintenance and access to client property in the lawyer's possession.<sup>1</sup>

Lawyers must adopt systems that ensure the maintenance, backup, storage and access to all client information<sup>2</sup> and lawyer's business records<sup>3</sup> whether in printed or electronic form while ensuring and maintaining client confidentiality.<sup>4</sup>

A lawyers' obligation to maintain confidentiality includes an obligation for the timely disposal of client information having regards to privacy law<sup>5</sup>, limitation periods, the nature of the information<sup>6</sup>, and obligations under the lawyer's liability insurance<sup>7</sup>. To facilitate this, a lawyer must adopt an internal policy in writing for file closure, retention, and destruction.



# Notes

<sup>1</sup> Nova Scotia Barristers' Society, [\*Code of Professional Conduct\*](#), Halifax: Nova Scotia Barristers' Society, 2012, rule 3.5-2

<sup>2</sup> Nova Scotia Barristers' Society, [\*Code of Professional Conduct\*](#), Halifax: Nova Scotia Barristers' Society, 2012, section 3.5

<sup>3</sup> Lawyers are required to keep business records for 7 years, see [NSBS Regulation 10.4.1](#)

<sup>4</sup> Nova Scotia Barristers' Society, [\*Code of Professional Conduct\*](#), Halifax: Nova Scotia Barristers' Society, 2012, section 3.5.

<sup>5</sup> Lawyers have an obligation to protect clients' privacy interest and, as mandated by legislation, to destroy files once they are no longer needed. In taking all reasonable steps to protect clients, law firms and lawyers must not:

- 1) Collect personal information that is not necessary for the purpose; and
- 2) Retain client files when retention is no longer necessary.

See [PIPEDA Principle 5](#) —Limiting Use, Disclosure, and Retention: Personal information shall be retained only as long as necessary for the fulfilment of those purposes.

<sup>6</sup> To determine when a file is no longer needed, a lawyer shall maintain and consistently apply a file destruction policy as guided by the application of the [\*Limitations of Actions Act\*](#)'s ultimate limitation period as an outside date of retention and the nature of each file. Where file retention is no longer needed, the lawyer must destroy it.

<sup>7</sup> The current liability policy covering lawyers in Nova Scotia requires lawyers to provide reasonable assistance with the defence and reasonable production of file information: 4.3(b) Information. After notification, the Insured shall submit promptly to the person(s) designated by the Insurer all information reasonably required by the Insurer that the Insured is reasonably capable of providing. ... 4.4 (d) Co-operation. The Insured shall co-operate fully with the Insurer and LIANS and, upon request, shall: ... -assist in conduct of the defence in all other reasonable respects.

## Additional Resources



- [Record Retention](#): Lawyers' Insurance Association of Nova Scotia
- [File Retention](#): Resources and Practice Aids, Lawyers' Insurance Association of Nova Scotia (2015)
- [File Retention and Destruction](#), Law Society of Ontario (retrieved December 2019)
- "Closed files: Retention and Disposition", The Law Society of British Columbia (2007)
- *Milbury v. Nova Scotia (Attorney General)*, 2007 Carswell NS 199.
- "[Law firms need document retention policies too](#)", Canadian Lawyer Magazine (October 2012)
- "[The Retention and Destruction of Client Files and Business Records for Lawyers](#)", Nova Scotia Barristers' Society, Professional Standards (Law Office Management) Committee (2013)
- [Sample Record Retention Policies](#)
- "[Surviving a Disaster: A Lawyer's Guide to Disaster Planning](#)", ABA Special Committee on Disaster Response and Preparedness (2011)
- International Legal Technical Standards Organization, 2011 Guidelines for Legal Professionals
- [Cloud Computing](#), Law Society of British Columbia
- [CBA Guidelines for Practicing Ethically with New Information Technologies](#), September 2008
- [CBA White Paper](#), Edward Poll
- [Association of Legal Administrators](#)
- [Technology Practice Management Guideline](#), Law Society of Upper Canada
- **Cloud Ethics Opinion**, Alabama Opinion 2010-02
- **Cloud Ethics Opinion**, Arizona Opinion 09-04
- **Cloud Ethics Opinion**, California Opinion 2010-179
- **Cloud Ethics Opinion**, Connecticut Informal Opinion 2013-07
- **Cloud Ethics Opinion**, Florida Opinion 12-3
- **Cloud Ethics Opinion**, Iowa Opinion 11-01



- **Cloud Ethics Opinion**, [Maine Opinion 194](#)
- **Cloud Ethics Opinion**, Massachusetts Opinion 12-03
- **Cloud Ethics Opinion**, New Hampshire Opinion #2012-13/4
- **Cloud Ethics Opinion**, [New Jersey Opinion 701](#)
- **Cloud Ethics Opinion**, [New York Opinion 842](#)
- **Cloud Ethics Opinion**, [Nevada Opinion 33](#)
- **Cloud Ethics Opinion**, [North Carolina Formal Ethics Opinion 6](#)
- **Cloud Ethics Opinion**, [Ohio Informal Advisory Opinion 2013-03](#)
- **Cloud Ethics Opinion**, [Oregon Opinion 2011-188](#)
- **Cloud Ethics Opinion**, [Pennsylvania Opinion 2011-200](#)
- **Cloud Ethics Opinion**, [Vermont Opinion 2010-6](#)
- **Cloud Ethics Opinion**, [Virginia Legal Ethics Opinion 1872](#)
- **Cloud Ethics Opinion**, [Washington Advisory Opinion 2215](#)
- **[Data Security Policy](#)**, Lawyers Mutual
- **[Disaster and Risk Management](#)**, Florida State Bar
- **[Technology](#)**, Florida State Bar
- **[Disaster Planning](#)**, Missouri State Bar
- **[Technology](#)**, South Carolina Bar
- **[Disaster Recovery](#)**, Tennessee Bar Association
- **[Technology Resources](#)**, Washington State Bar Association
- **[The Lexcel v4.1 Standard](#)**, The Law Society of England and Wales
- **Information Technology**, Australian Legal Practice Management Association
- **[Challenges for Corporate Counsel in the Land of E-Discovery: Lessons from a Case Study](#)** (p39) Pelc and Redgrave
- ***Zubulake v. UBS Warburg LLC, UBC Warburg and UBS ARG*** 02 Civ. 1243 (SAS)
- “**[Surviving a Disaster: A Lawyer’s Guide to Disaster Planning](#)**”, ABA Special Committee on Disaster Response and Preparedness, 2011



- “[Preparing for a Disaster: Data Backup and Beyond](#)”; Law Practice Today, April 2013
- “[Cyber Security for Attorneys: Understanding the Ethical Obligations](#)”, Law Practice Today, March 2012

## Commentary

### Retention and Maintenance

A lawyer is responsible to store and maintain all information in the lawyer’s possession whether it is in an electronic or paper format. The responsibility to maintain and safeguard information entrusted to the lawyer is the same whatever format the information is in. However, the method the lawyer chooses to discharge the responsibility will vary depending on what form the information is in and the lawyer’s practice. The lawyer must protect the information from foreseeable dangers such as natural disasters, theft, vandalism, computer failure or online security issues.

Where a lawyer chooses to print information and keep a paper file, the lawyer will have to consider safe and secure storage options for the file until it can be destroyed in accordance with the lawyer’s obligations. Options for safe storage include commercial storage facilities, onsite storage locker and fire and water proof safes. The most effective way to safeguard against any disaster is to have more than one copy of the file in two different locations.

If the information is in an electronic format, safe and effective storage may be achieved by a combination of storage on the lawyer’s computer, external hard drives and cloud computing. As with paper files, it is a good idea to store copies of files in different locations.

Lawyers should adopt written policies detailing file retention, closure and destruction procedures saving regards to the nature of the file, client needs and abilities, legal and regulatory requirements and applicable limitation periods.

As part of a lawyer’s obligation to care for a client’s property, lawyers are expected not only to maintain client records, but to maintain them in a manner that allows for them to be practically accessible, with special considerations given to lawyers



or clients with disabilities when choosing file format. This not only allows a lawyer to complete his / her ethical obligations, it makes good business sense.

There has been no shortage of disasters in the last few years, from flooding to hurricanes to fires to crane collapses. Such a disaster can drive lawyers out of their offices, prevent access to client files, disrupt communications and put time-sensitive matters at risk.

There are many ways to backup information. Lawyers should use a combination of methods to mitigate against potential disasters. A lawyer should ensure that he or she reviews the technology of their backup on a regular basis.

There are a variety of methods to backup electronic data. Lawyers will need to determine the method best suited to their individual / firm needs. For some lawyers, this may mean backing up data to an external hard drive which is then stored in a separate location (such as your home); for other lawyers, this may mean using a cloud based service provider; for firms, this may mean using a separate server in a secure location.

It is recommended that lawyers set up automatic backups of all their data. Otherwise the frequency of backup may depend on the nature of their practice and the amount of work they produce. Each lawyer has an obligation to ensure they have a policy that their electronic data is backed up in a timely fashion and at a frequency that is appropriate to ensuring all client information is available should there be a problem. For most lawyers this would be at least daily and depending on the nature of the lawyer's work it could be even more frequently. A lawyer simply needs to ensure that as much electronic data as possible is backed up in the event of a disaster.

Simply putting a process in place to backup electronic data and then assuming it works and continues to work is not sufficient. Regular testing should be done to ensure that the backup is working and remains accessible. Each lawyer should have in place a policy to test their electronic backup system on a regular basis. The overriding goal of any backup system is to ensure that in the event of an emergency business can continue without any interruption. Clients can continue to access their file material as necessary and lawyers are able to access their files to continue work with as little impact on productivity as possible. If a lawyer keeps that in mind as well as the overriding issues with respect to client confidentiality

then it is possible to adopt and develop a policy with respect to the backup and storage of electronic data.

## **Destruction**

The lawyer's obligation to maintain files only exists as long as maintaining the file is necessary. Lawyers have a legal obligation not to collect or maintain information where it is no longer necessary to do so in accordance with privacy legislation. Where a file is no longer needed, a file must be destroyed.

The ultimate limitations period may be an indicator of necessity having regards to the nature of their file. For example, the 15-year limitation period for a personal injury judgment involving a minor may not start at the same time as one involving an adult and therefor the file may have to be maintained longer. The retention of instructions in wills files may vary greatly depending on the facts and the legal obligations that flow from these files.

However, the ultimate limitations period is only a guide as each lawyer must develop its own file destruction policies. As long as the file destruction policy is defensible and consistently applied, lawyers will meet their obligations under the standards.

Lawyers may wish to use NSBS' resources: File Retention & Destruction Template Policy and Basic Privacy Policy. Legal Services Support is available to assist firms in uncovering and meeting their obligations.

**Approved by Council on February 27, 2026.**

# Standards

- ▶ Record Retention and Maintenance of Electronic Data
- ▶ Client Service and Communication
- ▶ Lawyers' Fees
- ▶ Cloud Computing



- ▶ Equity and Diversity
- ▶ Succession Planning
- ▶ Technological Competence

## LAWYERS' INSURANCE ASSOCIATION OF NOVA SCOTIA

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## #2 – Client Service And Communication

LIANS » Standards » Law Office Management Standards » #2 – Client Service and Communication

### Standard

A lawyer must deliver services to clients based on:

- an up to date<sup>1</sup> and a sound knowledge of the law<sup>2</sup>,
- the ability to undertake the services<sup>3</sup>,
- an understanding of ethical considerations<sup>4</sup>,
- client expectations<sup>5</sup>,
- the skills to deliver culturally competent services<sup>6</sup> in a cost-effective manner<sup>7</sup> and
- to provide these services in a non-discriminatory manner.<sup>8</sup>

A lawyer should always provide clear, candid, and timely service and communication when interacting with their client.<sup>9</sup>

A lawyer should always communicate with courtesy and good faith with their client and with all other relevant parties involved in a matter.<sup>10</sup>



A lawyer must provide reasonable accommodation to the point of undue hardship or as required by law.<sup>11</sup>

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## Footnotes

<sup>1</sup>[Regulation 8.3.4](#) permits the Council of the Nova Scotia Barristers' Society to from time to time prescribe mandatory training and educational requirements. As per regulation 8.3.6, in each of the society's fiscal years (July 1- June 30), members are expected to complete a minimum of 12 hours of Continuing Professional Development.

Under regulation 8.3.8 every member is required to prepare and implement a written plan for continuing professional development, make a declaration to the Executive Director that a plan has been prepared and implemented, maintain a record of continuing professional development undertaken and keep the record for five years from the date of declaration; and provide a copy of the plan and the record of continuing professional development undertaken to the Executive Director on request.

For additional information see "Creating a CPD Plan" on the Society's website <https://nsbs.org/legal-profession/your-practice/responsibilities-requirements/professional-development/creating-a-cpd-plan/> ) See also: Commentary [3] set out under rule 3.1-2 of [the Code](#). In deciding whether the lawyer has employed the requisite degree of knowledge and skill in a particular matter, relevant factors will include the complexity and specialized nature of the matter, the lawyer's general experience, the lawyer's training and experience in the field, the preparation and study the lawyer is able to give the matter and whether it is appropriate or feasible to refer the matter to, or associate or consult with, a lawyer of established competence in the field in question.

<sup>2</sup>See Commentaries [2] through [7] set out under rule 3.1-2 of the Code. For practical purposes, knowledge is generally regarded as including the ability to acquire the knowledge of law, procedure and relevant technology necessary to provide the legal services the client requires.

<sup>3</sup>This may include consulting with alternative or even specialized counsel or solicitors if necessary. See also Commentaries [3](e) and [6](b) set out under rule 

### 3.1-2 of the Code.

See also 3.2-2B of the Code: where a client wishes to retain a lawyer for representation in the official language of the client's choice, the lawyer must not undertake the matter unless the lawyer is competent to provide the required services in that language, or if the lawyer feels competent to provide the required services with the assistance of an interpreter.

<sup>4</sup>See Rule 3.2-2 of the Code and in particular Commentary [1] – [3] which requires that a lawyer disclose to the client all the circumstances of the lawyer's relations to the parties and interest in or connection with the matter that might influence whether the client selects or continues to retain the lawyer.

Advice to a client must be “open and undisguised” and must clearly disclose what the lawyer honestly thinks about the merits and probable results. Occasionally, a lawyer must be firm with a client. Firmness, without rudeness, is not a violation of the rule.

In communicating with the client, the lawyer may disagree with the client's perspective, or may have concerns about the client's position on a matter and may give advice that will not please the client. This may legitimately require a firm and animated discussion with the client.

The lawyer should take a culturally and trauma informed approach (see footnote six for a discussion on being on cultural competency and being a trauma informed lawyer) to any such discussions. While firmness may be required, the lawyer should not engage in a manner that causes further harm to the client.

See Rule 3.2-7 and in particular Commentary [1] – [4] that cautions lawyers to be on guard against becoming a tool of an unscrupulous client or others. A lawyer must be vigilant against becoming unwittingly involved in criminal activities such as fraud and money laundering. If suspicious, lawyers should make reasonable inquiries to obtain information about the client or others, and the subject matter of their retainer including verifying legal owners of properties and business entities, and clarifying the purpose of complex transactions. Lawyers should keep records of their inquiries. Bona fide test cases are not necessarily precluded provided no injury to a person or violence is involved.



See also Rule 3.2-8 and commentary which requires a lawyer who knows an organization has acted or intends to act dishonestly, fraudulently, criminally or illegally must advise the person from whom they take instructions that the proposed conduct is dishonest, etc. If the person providing instructions refuses to take action, the lawyer must report “up the ladder” of responsibility within the organization until the matter is dealt with appropriately. If the organization, despite the lawyer’s advice, continues the wrongful conduct, the lawyer must withdraw from acting and in some but not all cases, withdrawal means resigning from their position within the organization and not just from the particular matter.

<sup>5</sup>See Commentary [5] set out under rule 3.2-1 and Commentaries [9] and [10] set out under rule 3.1-2 of the Code. The latter Commentaries warn lawyers to be wary of bold and perhaps overconfident predictions on the outcome of any given matter and to advise of any lack of experience or other qualification in a particular field.

<sup>6</sup>See Wolley, Alice; Richard F. Devlin & W. Brent Cotter. *Lawyers’ ethics and professional regulation*, fourth ed (Toronto, Ontario: LexisNexis, 2021) at p. 119-121 for their discussion on cultural competence.

Rose Voyvodic in, “Lawyers Meet the Social Context: Understanding Cultural Competence” (2005) 84: Special Issue Can. Bar Rev. 563 at 582 (as found in Wolley et al at p. 120) argues that cultural competence has three dimensions:

- KNOWLEDGE: about how “cultural” differences affect client experiences of the legal process as well as their interactions with lawyers;
- SKILLS: through self-monitoring, to identify how assumptions and stereotypes influence their own thinking and behaviour, as well as the thinking and behaviour of others, and to work to lessen the effect of these influences;
- ATTITUDE: awareness of themselves as a cultural being and of the harmful effects of power and privilege; and the willingness and desire to practice competently in the pursuit of justice.

For a conversation around cultural competence and truth and reconciliation see Pooja Parmar in, “Reconciliation and Ethical Lawyering: Some Thoughts on Cultural Competence” (2019) 97:3 Canadian Bar Review 526-557.



The Truth and Reconciliation Commission's twenty-seventh Calls to Action call upon the Federation of Law Societies of Canada to:

*...ensure that lawyers receive appropriate cultural competency training, which includes the history and legacy of residential schools, the United Nations Declaration on the Rights of Indigenous Peoples, Treaties and Aboriginal rights, Indigenous law, and Aboriginal–Crown relations. This will require skills-based training in intercultural competency, conflict resolution, human rights, and anti-racism.*

Crown-Indigenous Relations and Northern Affairs Canada. *Delivering on Truth and Reconciliation Commission Calls to Action 2023*: <https://www.rcaanc-cirnac.gc.ca/eng/1524502695174/1557513515931=>

For a discussion on African Nova Scotian cultural competency see Legal Info Nova Scotia webinar entitled “Best Practices when Working with African Nova Scotian Clients” – Legal Info Nova Scotia. *Cultural Competence Videos, 2022*: <https://www.legalinfo.org/cultural-competence-videos#video-highlighting-the-african-nova-scotian-community-4>

When communicating with your client you should use gender neutral language until you learn of your client's preferred pronouns. See the Canadian Bar Association (Nova Scotia) Gender Neutral Terminology Guide which states:

Moving beyond the use of gendered titles within the legal profession (e.g., Sir/Madam; my Lord/my Lady; Mr. Justice/Madam Justice) helps to create and support a more equitable, diverse, and inclusive justice system by removing gendered distinctions and using inclusive language. Using gender neutral terminology also avoids the risk of misgendering a person whose gender you don't know, until such time as you learn their pronouns. The Canadian Bar Association Nova Scotia Branch. *Gender Neutral Terminology Guide 2022*: [https://www.cbans.ca/getattachment/Publications-Resources/Resources/Gender-Neutral-Terminology-Guide-2022/Gender-Neutral-Terminology-Guide-2022/CBA-NS\\_Gender-Neutral-Terminology-Guide\\_2022.pdf](https://www.cbans.ca/getattachment/Publications-Resources/Resources/Gender-Neutral-Terminology-Guide-2022/Gender-Neutral-Terminology-Guide-2022/CBA-NS_Gender-Neutral-Terminology-Guide_2022.pdf)

Generally speaking, competency includes: an understanding of the subject matter for which the lawyer has been retained (or, in the alternative, the ability to acquire an understanding of that subject matter, legal research, analysis, application of ^

the law to the relevant facts, writing and drafting, negotiation, alternative dispute resolution, organized and persuasive advocacy (both written and oral) and problem solving.)

In certain circumstances, a lawyer's ethical duty to their client will require the referral of the latter to alternative counsel or at least the retention (on the client's instructions) of the assistance of alternative counsel and/or other experts in non-legal fields (see: Commentaries [5] through [7] set out under rule 3.1-2 (supra).

See also rule 3.1-2 of the Code and footnote 4 (supra). See also the extensive commentaries set out under rule 3.1-2 of the Code which assist in defining the scope and application of the Code's general competency requirements.

### Cultural Competency and the Trauma-Informed Lawyer

A lawyer should take a trauma informed approach to client services.


A trauma-informed approach assumes that an individual is more likely than not to have a history of trauma. A trauma-Informed approach recognizes the presence of trauma symptoms and acknowledges the role trauma may play in an individual's life.

A trauma-informed approach changes organizational culture to emphasize respecting and appropriately responding to the effects of trauma at all levels. It requires a system to make a paradigm shift from asking, "What is wrong with this person?" to "What has happened to this person?"

The intention of a trauma-informed approach is not to treat symptoms or issues related to trauma, but rather to provide legal services in a way that is accessible and appropriate to those who may have or continue to experience various and often intersecting forms of trauma, such as, sexual, physical, emotional, and racial trauma.

#### **Example:**

When a client has experienced trauma, their story or information might be shared in a non-linear way. This might otherwise be mistaken as a lack of credibility.

When legal services procedures do not use a trauma-informed approach, the possibility of triggering or exacerbating trauma symptoms and re-traumatizing 

clients increases.

### **Additional Resources:**

Myrna McCallum, The Trauma Informed Lawyer. Podcast.

<https://www.myrnamccallum.co/podcast>

<sup>7</sup>See rule 3.1-1(e) of the Code.

<sup>8</sup>Code of Conduct 3.6-1 and Commentary 1-9.

<sup>9</sup>See Code at 3.1-1, 3.1-2 and 3.2-1 for further information.

A best practice is to ask the client what their communication preference is and to document what the client advises.

See Code at 7.2-1 and Commentary [1] which informs that a lawyer has some discretion regarding the timeliness of their communication with third parties however, the public interest demands that matters entrusted to a lawyer be dealt with effectively and expeditiously. The lawyer who behaves otherwise does a disservice to the client, and neglect of the rule will impair the ability of lawyers to perform their function properly.

<sup>10</sup>Any ill feeling that may exist or be engendered between clients, particularly during litigation, should never be allowed to influence lawyers in their conduct and demeanor toward other legal practitioners or the parties. The presence of personal animosity between legal practitioners involved in a matter may cause their judgment to be clouded by emotional factors and hinder the proper resolution of the matter. Personal remarks or personally abusive tactics interfere with the orderly administration of justice and have no place in our legal system.

See also 7.2-4 through 7.2-7.2-6A and commentaries.

<sup>11</sup>Code of Conduct 3.6-1 Commentary (7)(g) and the *Nova Scotia Human Rights Act* s. 3(l).

Accommodation might be achieved, for example, by using plain language in your client communications; training and instructing staff on how to be attuned to clients' needs; and authentically interpreting clients' signals – recognizing that clients do not all communicate or signal their needs in the same way.



**Example #1:** If a lawyer’s office is not physically accessible to a client who cannot navigate stairs, the lawyer should find alternate ways to provide their services to the client such as accommodating a meeting in another accessible private space.

**Example #2:** Clients living with disabilities, whether they be physical, intellectual or mental health, may require a support person. A support person can be a paid personal support worker (PSW), a volunteer, a family member, or a friend.

A lawyer should always look at and speak directly to their client and not the support person, even if the client is communicating through the support person.

### **Additional Resources:**

[Sample Accommodations Policy](#)

[Sample Accommodations Checklist](#)

[Sample Support Person Agreement](#)

**Approved by Council on November 22, 2013, amended September 15, 2023.**

## Standards

- ▶ #1 – Record Retention
- ▶ #2 – Client Service and Communication
- ▶ #3 – Lawyers’ Fees
- ▶ #4 – Maintenance and Backup of Electronic Data
- ▶ #5 – Cloud Computing
- ▶ #6 – Equity and Diversity
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# #3 – Lawyers' Fees

LIANS » Standards » Law Office Management Standards » #3 – Lawyers' Fees

**Note:** New Standard #3 (Lawyers' Fees) was approved by Council on January 26, 2024 to replace/merge old Standards #3: Timekeeping; #5: Retention and Billing; and #7: Limited Scope Retainers.

## Standard

A lawyer's fee must be reasonable having regards to the client's needs, the lawyer's<sup>1</sup> expertise and skill<sup>2</sup>, special circumstances of the retainer<sup>3</sup>, the effort and time required<sup>4</sup> as well as the outcome achieved.<sup>5</sup>

The lawyer's scope of services and method of fee calculation should be clearly defined and where practical, the final price should be outlined at the outset of the retainer. A final price<sup>6</sup> agreed to at the outset is one indicator that fees are fair and reasonable.<sup>7</sup>

A lawyer has a responsibility to discuss the nature and scope of any retainer with the client. While most retainers and fee agreements should be reduced to writing, limited scope retainers and fee agreements must be made in writing.<sup>8</sup>



# Notes

- 1 [Nova Scotia Civil Procedure Rules](#) 77.13(2)(b) and Nova Scotia Barristers' Society [Code of Professional Conduct](#) 3.6-1 Commentary (1)(b)
- 2 NS CPR 77.13(2)(e) and NSBS *Code of Professional Conduct* 3.6-1 Commentary 1(c) and (i)
- 3 NS CPR 77.13(2)(f) and NSBS *Code of Professional Conduct* 3.6-1 Commentary (1)(f)
- 4 NS CPR 77.13(2)(a) and NSBS *Code of Professional Conduct* 3.6-1 Commentary (1)(a)
- 5 NSBS *Code of Professional Conduct* 3.6-1 Commentary (1)(d)
- 6 A final price is a fee that is expressed as a firm dollar figure and not dependent on hours worked or outcome.
- 7 NS CPR 77.13(2)(f) and NSBS *Code of Professional Conduct* 3.6-1 Commentary (1)(h) and (k)
- 8 NSBS *Code of Professional Conduct* 3.2-1A

## Additional Commentary

**Fair and Reasonable. Clearly Communicated. For the Public Interest.**

### *Fair and Reasonable*

Lawyers are in a privileged position of have the exclusive right to provide legal services in exchange for fees as regulated by the NSBS [Legal Profession Act](#). The *Act* along with the [NSBS Code of Professional Conduct](#) mandate that lawyers' fees must be reasonable<sup>9</sup> as defined in part by the *Civil Procedure Rules*.<sup>10</sup>

Beyond specific requirements for certain types of agreements such as Contingency Fee Agreements<sup>11</sup> or Limited Scope Retainers<sup>12</sup>, lawyers are free to craft and deliver services with fee structures of their choosing so long as they are “fair and reasonable”, a principle confirmed by the Court of Appeal.<sup>13</sup>



## **Clear Communication**

The method of calculating fees is in the lawyer's professional discretion subject to clear communication<sup>14</sup> of the chosen and agreed fee arrangement with each client – see also LOMC [Standard #2: Client Service and Communication](#) on the importance of clear, candid, timely, and culturally competent communication with the client.

## **Limited Scope Retainer**

Clear communication is particularly important where a lawyer undertakes a Limited Scope Retainer (“LSR”) to ensure all parties including courts and opposing parties understand the precise task that the lawyer has been retained to do.

The *Code* defines an LSR as “the provision of legal services for part, but not all, of a client’s legal matter by agreement with the client”.<sup>15</sup> There are many variations, but can broadly be broken down into consultation, document preparation, and limited representation.

It is important in any engagement to define the scope of the retainer, including events of termination or deemed termination, in writing. This “best practice” becomes critical, and in fact mandatory, in an LSR.

While the exact nature of the engagement will depend on the specific topic and the particular solicitor-client relationship, an LSR retainer agreement, signed by all parties, should at a minimum include:

- a. A statement that it is an LSR and that the lawyer is not engaging in nor advising upon matters beyond the scope of the LSR;
- b. A detailed description of exactly what the lawyer is retained to do;
- c. The fact that there are other issues upon which the client can, and should, obtain independent legal advice or representation, as the case may be;
- d. Who is in charge of filing documents, if applicable, and how disbursements are treated;
- e. Any applicable limitation period, or that advice is not being given on them;



- f. The circumstances in which the engagement is completed, or terminated, or in which the lawyer is entitled to withdraw or is deemed to have been discharged.<sup>16</sup> This may, for example include situations in which the lawyer is engaged for what is expected to be a default or uncontested proceeding though it is in fact opposed.<sup>17</sup>
- g. How fees are to be calculated, and when they are to be paid;
- h. Any disclosure required given the fiduciary nature of the solicitor-client relationship;
- i. Subject to any rules or practice of Court, when the lawyer is to appear on the Record, a direction to disclose to the Court the scope and limit of that engagement;
- j. Provisions for expansion, if such is to be the case, of the LSR.

Lawyers, both from a business and liability perspective, should beware of potential “retainer creep”.<sup>19</sup> The lawyer who is asked to “answer a quick question” about a matter outside the scope of the agreed-upon retainer not only risks expanding the business scope of the representation (either with or without compensation) but runs the substantial risk of actionable negligence in the event of an incomplete or inaccurate answer. Preserving the “four corners” of the LSR also engenders respect for the solicitor-client relationship and the value of the legal services engaged and agreed to be paid for.<sup>20</sup>

The lawyer who does not take care in the retainer clearly to specify what is and is not within the scope of the engagement will likely have any ambiguity construed against the lawyer.<sup>21</sup>

The lawyer should also be especially careful to document what information and documents are provided by the client, particularly if the subject of the LSR is either “midstream” or conclusive to the matter at hand. For example, the lawyer who is called upon to give a recommendation on a proposed settlement and who is provided with only part of the file is not in a position to provide a competent evaluation on the merits.

The LIANS website, as well as resource materials referred to in the bibliography, contain several useful checklists; in particular, the “who does what” treatment of



steps in a transaction or proceeding is useful in removing ambiguity or later disagreement.<sup>22</sup>

### **Fair Compensation**

Like any service provider, lawyers are entitled to fair compensation for their efforts. However, unlike other fee for service arrangements, lawyers are also mandated to take into account their clients interests, value of the service provided and the overall context of their professional responsibility as a member of the bar to uphold the public interest.<sup>23</sup>

Even where a fee is calculated based solely on time spent, the lawyer still has a professional obligation to ensure fees billed are fair and reasonable. Presumed accuracy of the chosen method does not create a presumption that the fee is itself fair and reasonable. Lawyers have an obligation to ensure it is.

### **Public Interest**

This professional obligation is a reflection of a lawyer's privilege and resulting responsibility of being entrusted to uphold principles of justice in a civil society. As noted by one playwright and later interpreted as an intended action to effect civil disorder:

*"The first thing we do, let's kill all the lawyers"*<sup>24</sup>

Lawyers play a central role in ensuring a just and civil society, therefore have an inherent responsibility to ensure that fees are calculated beyond just the considerations of time and effort and includes the lawyer's obligation to serve the public interest, one that goes to the heart of maintaining a civil society.

## Notes

**9** NSBS [Legal Profession Act](#) at s.66; NSBS [Code of Professional Conduct](#) at 3.6-1,

**10** [Nova Scotia Civil Procedure rule 77.13\(2\)](#).

**11** *Code* at 3.6-2

**12** Limited Scope Retainers must be in writing (see the *Code* at 3.2-1A)



**13** [\*Mor-Town Developments Ltd. v. MacDonald, 2012 NSCA 35\*](#) (at para 49)

**14** Code 3.6-1

**15** Nova Scotia Barristers' Society, *Code of Professional Conduct*, Halifax: Nova Scotia Barristers' Society, 2012, rule 1.1-1(i)

**16** In certain circumstances, it may be appropriate to include this as a separate document, so as to enable its filing with a Court or applicable third parties without disclosing more information than necessary.

**17** In particular, see Family Law [Standard #11: Scope of Representation](#).

**18** For sample checklists and forms, see [LIANS' Limited Scope Retainer Resources](#)

**19** Although there is no concrete evidence that LSRs have given rise to increased claims or insurance payouts (see Macfarlane, "Listening to the Public", and indeed some evidence to the contrary (see ABA report, p. 75 et seq.), the very nature of the LSR calls for increased vigilance in ensuring that the lawyer and client are, at all times, on the same page in what the client believes the lawyer is responsible for, and what the lawyer in fact is undertaking to do. See also ABA Report, p. 56.

**20** Gallagher, Edward: "Limited Scope Retainers in a Small Practice", [CBA paper, hereinafter "CBA Report"], p. 29 at 31.

**21** [\*Trillium Motor World v. General Motors of Canada, 2015 ONSC 3824\*](#), involved a multi-million dollar claim relating to advice giving to dealers whose GM franchises were being terminated.

While currently (2015) on appeal, the decision focuses at para. 462 et seq. on the importance for the scope of the retainer to be defined clearly. At Para. 469-70, the Court stated:

*[469] Where a retainer clearly limits the scope of legal services to be provided, a client generally cannot, at a later stage, criticize the lawyer for failing to perform services that fall outside the scope of the retainer.*

*[470] On the other hand, where a retainer has not been reduced to writing, a heavy onus is on the lawyer to show that its version of the scope of the retainer is*



*correct: Griffiths v. Evans, [1953] 2 All E.R. 1364, [1953] 1 W.L.R. 1424 (C.A.); Rye and Partners v. 1041977 Ontario Inc., [2002] O.J.*

*No. 4518 (S.C.). This is especially true in cases involving ambiguity as to the scope of the retainer. As Justice Hoilett stated in Coughlin v. Comery, [1996] O.J. No. 822 at para. 34 (Gen. Div.), aff'd [1998] O.J. No. 4066 (C.A.), leave to appeal to S.C.C. refused [1998] S.C.C.A. No. 597:*

*...the onus is on the solicitor who seeks to limit the scope of his/her retainer and where there is ambiguity or doubt it will, generally, be resolved in favour of the client.*

**22** See footnote 17

**23** See [s.4 of NSBS Legal Profession Act](#) for Nova Scotia Barristers' Society's role to "uphold and protect the public interest in the practice of law" as well as the NSBS *Code of Professional Conduct* at 2.1 upholding values of integrity to the public

**24** "Henry VI (Part 2) the play by William Shakespeare"

**Approved by Council on January 26, 2024.**

## Standards

- ▶ #1 – Record Retention
- ▶ #2 – Client Service and Communication
- ▶ #3 – Lawyers' Fees
- ▶ #4 – Maintenance and Backup of Electronic Data
- ▶ #5 – Cloud Computing
- ▶ #6 – Equity and Diversity
- ▶ #7 – Succession Planning



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# #5 – Cloud Computing

LIANS » Standards » Law Office Management Standards » #5 – Cloud Computing

## Standard

A lawyer who uses Cloud Computing services for storing, processing, retrieving or transmitting client data must provide that reasonable care is taken to ensure that the data is at all times secure and accessible. The service provider and the technology used must support the lawyer's professional obligations, including compliance with the Nova Scotia Barristers' Society's regulatory processes<sup>1</sup>, and be in compliance with applicable privacy legislation, such as the federal *Personal Information Protection Electronic Documents Act* (PIPEDA)<sup>2</sup>.

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## NOTES

<sup>1</sup> Nova Scotia Barristers' Society, *Code of Professional Conduct*, Halifax: Nova Scotia Barristers' Society, 2012: rule 3.1-2 "Competence"; rule 3.3-1 "Confidential Information"; rule 3.5-1 "Preservation of Client's Property"; and section 7.1 "Responsibility to the Society and the Profession Generally".

<sup>2</sup> *Personal Information Protection and Electronic Documents Act, SC 2000, c 5*.



# PRACTICE NOTES

## Introduction

Cloud Computing, or Software as a Service (“SaaS”) has become ubiquitous in practice. Practice management software, emails, file storage – many of these tools rely on cloud computing technologies. “Cloud Computing” means delivery of computing services – including servers, storage, databases, networking, software, analytics, and intelligence – over the Internet.

The benefits of Cloud Computing include lower upfront costs, reduced need for in-house expertise, and ease of use. However, Cloud Computing does raise significant questions about confidentiality, security, and control of client data stored and processed outside of the traditional brick and mortar law firm.

The question is no longer whether Cloud Computing should be permitted, but what is required of the practitioner who uses this technology.

## Jurisdiction

Cloud services involve data storage which is outside of the de facto control of the lawyer responsible for the data. A cloud server will likely be located in a jurisdiction other than the province of Nova Scotia. This brings a risk that the data may not have the same level of legal protection that it would in our jurisdiction. In fact, the data might be backed up on servers all over the world, making the task of due diligence regarding security and confidentiality onerous.

The other side of the jurisdictional problem is that foreign governments may have legislative power of search and seizure that will affect the risk of breach of confidentiality. The USA Patriot Act is an example.

The third issue arising in this context is the Law Society’s ability to enforce an order for the disclosure of a lawyer’s records when those records are stored in another jurisdiction. There is a difference between data disclosure and access. For example, data can be obtained but not accessed if it is encrypted. Encryption is a process of making data unintelligible, unless the person trying to access the data has a password – without the password the data is nearly impossible to access in the sense that the data cannot be read without the password.



It is possible for lawyers to mitigate the risk of data being accessed by using strong encryption on all data being stored or processed in the cloud, installing regular software updates and establishing email and internet use policies (including the use of strong passwords) within their offices.

## Security

When a lawyer entrusts storage of data to a service provider, they entrust the security of that data to that service provider. This delegation of responsibility to a service provider raises questions of both the adequacy of data security at the time of initial storage and whether the level of security is maintained and updated as technology changes.

When deciding which third party service to engage, the lawyer may choose to provide the service provider with the [NSBS Cloud Computing Checklist for Cloud Service Providers](#). It contains useful technical questions for the service provider to answer. Their answers will indicate whether or not their service is technically robust and could assist the lawyer in assessing compliance with their obligations.


## Records Retention and Management

Cloud Computing service providers are companies just like any other – they may cease operations at any time. It is also possible a service provider will suffer a catastrophic loss of infrastructure resulting in loss of data stored on their servers.

Generally, service providers have terms of service that limit their liability with respect to data loss. It is also unlikely that a large company would be willing to sign an escrow agreement with a small or solo practitioner using their service.

Best practice for a lawyer is to backup any data stored in the cloud on a regular basis, and to test the backup periodically. This will ensure that in the event data is somehow irretrievable from the cloud, the lawyer will be able to go to their back-ups to restore access to that information.


## Privacy

PIPEDA applies to organizations that collect, use or disclose personal information in the course of commercial activities. This includes private sector lawyers and law firms. Lawyers should familiarize themselves with this legislation and satisfy themselves that their obligations have been met, particularly with respect to: 

- clients' consent to store data in the cloud;
- safeguards appropriate to the sensitive nature of the data stored;
- transparency regarding data collection and retention process;
- scheduled destruction of data, and
- reporting obligations in the event of a breach of security safeguards.

## How to I ensure I have exercised the appropriate level of due diligence when it comes to Cloud Computing service providers?

There are practical limitations for engaging in due diligence relating to Cloud Computing service providers. Often service providers are large companies and are unlikely to engage with small or medium organizations to assist them with due diligence. However, there are some steps the practitioner can take to fulfill their professional obligations:

1. **Have the service provider complete the [NSBS Cloud Computing Checklist for Cloud Service Providers](#).** This is checklist is optional and is not exhaustive; however, it may help lawyers gauge the level of risk associated with engaging the services of a particular third party service provider.
2. **Use the [NSBS Annotated Law Practice Cloud Computing Checklist](#) to assess the answers provided by the Cloud Service Provider in the completed [NSBS Cloud Computing Checklist for Cloud Service Providers](#).** The annotated version is intended to only be used by the Law Practice/Lawyer and provides comments explaining the importance of the various questions and outlines instances where a “No” answer may be acceptable based on the nature of the service. In cases where technical issues may impact the lawyer’s ability to assess the risks of the cloud service based on the provider’s answers, it may be advisable to consult with a computer security expert or managed service provider if particularly sensitive data is being stored.
3. **Read the service provider’s terms of service**, service level agreement, privacy policy and security policy. Lawyers must take steps to ensure the confidentiality and privilege of their clients’ information is protected. Clear contractual language should be used to accomplish this objective. 

4. **Try to ascertain where the data is stored / hosted.** Consider the political and legal risks associated with data storage in foreign jurisdictions. If the jurisdiction where the data is stored poses a risk or uncertainty, any data being stored in the Cloud should be encrypted or otherwise secured. Regardless of whether or not encryption is used, the lawyer must consider whether they can comply with Nova Scotia and federal laws, such as laws governing the collection of personal information, when using third-party service providers.
5. **Determine how easy or difficult it is to extract the information.** Many companies will have an “export” function where all the data in their system can be removed on request and stored locally by the lawyer. This is an important functionality to ensure the lawyer has control over the data stored in the cloud.
6. **Determine who owns the data.** Confidentiality and privilege are rights that lie with the client. Lawyers must ensure ownership of their clients’ information does not pass to the service provider or a third party.

Due diligence is a continuing obligation. Lawyers should strive to remain current on changes in technology that might affect the initial assessment of whether a service is acceptable. Services, and service providers, may become more or less acceptable in light of technological and business changes.

## ADDITIONAL RESOURCES

- [PIPEDA](#)
- [Office of the Privacy Commissioner of Canada – PIPEDA and your Legal Practice](#)
- [Cloud Computing resources](#) – LIANS
- [Record Retention Standard](#) – LIANS
- [Maintenance and Back up of Electronic Data Standard](#) – LIANS
- [Cloud Computing Due Diligence Guidelines](#), Law Society of British Columbia
- [The Basics of Cloud Computing](#), Law Society of Alberta.
- [Technology Practice Management Guideline](#), Law Society of Upper Canada



- LSBC, [Sample internet and email use policy](#)
- PracticePro, [Managing the security and privacy of electronic data in a law office](#)
- PracticePro, [Backup best practices and strategies](#)
- Government of Canada, [Get Cyber Safe \(resources\)](#) – including [Get Cyber Safe Guide for Small and Medium Businesses](#) (see Appendix A: Cyber Security Status Self-Assessment)
- LIANS, [Data protection](#)
- Law Society of Alberta, [Computer/Network Security Checklist](#)
- [Data Security Policy](#), Lawyers Mutual

Approved by Council on June 13, 2015; revised January 26, 2024.

## Standards

- ▶ #1 – Record Retention
- ▶ #2 – Client Service and Communication
- ▶ #3 – Lawyers’ Fees
- ▶ #4 – Maintenance and Backup of Electronic Data
- ▶ #5 – Cloud Computing
- ▶ #6 – Equity and Diversity
- ▶ #7 – Succession Planning
- ▶ #8 – Technological Competence



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# Equity, Diversity, Inclusion And Accessibility

LIANS » Standards » Law Office Management Standards » Equity, Diversity, Inclusion and  
Accessibility

## Standard

A lawyer and law firm must treat all persons with dignity and respect and in a manner consistent with the spirit and the letter of human rights law, the *Code of Professional Conduct*, and relevant health and safety and accessibility laws.

A law firm must have proportionate and principled written policies with regards to such obligations.<sup>1</sup>

When adopting policies the lawyer or law firm shall consider all relevant factors to that lawyer or law firm including:

- (a) the development of fair and unbiased criteria in the recruitment, selection, and retention of clerks, lawyers, and staff;
- (b) management policies appropriate for the lawyer or law firm including anti-harassment, anti-discrimination, parental leave, accommodations for persons with disabilities, cultural competence;

(c) a meaningful process to enforce such policies including regular review of existing policies and the creation of new policies as needed, and;<sup>2</sup>

(d) reference to protection against reprisal(s).<sup>3</sup>

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## Commentary

A lawyer should foster a professional environment that is respectful, accessible, and inclusive, and should strive to recognize their own internal biases and take particular care to avoid engaging in practices that would reinforce those biases, when offering services to the public and when organizing their workplace. (s. 6.3 of the NSBS [\*Code of Professional Conduct\*](#))

## Footnotes

<sup>1</sup> [\*Human Rights Act\*](#), RSNS 1989, c 214, s. 3.; [\*Employment Equity Act\*](#), SC 1995, c 44.; Nova Scotia Barristers' Society, [\*Code of Professional Conduct\*](#), Halifax: Nova Scotia Barristers' Society, 2012, sections 6.3 and 3.1; consider element #9 in the workbook for [\*Self-Assessing your Law Firm \(MSELP\) – Nova Scotia Barristers' Society \(nsbs.org\)\*](#); [\*Occupational Health and Safety Act\*](#), RSNS 1996, c 7, s. 45, 46; [\*Accessibility Act\*](#), RSNS 2017, c 2.

<sup>2</sup> *Shah v. George Brown College*, [2009 HRTO 920](#) (CanLII) [Ont. Human Rights Tribunal]

<sup>3</sup> [\*Code of Professional Conduct\*](#), Halifax: Nova Scotia Barristers' Society, 2012, rule 6.3-4.

## Additional Resources

### Templates

- [Model Policy: Workplace Equality](#) (July 2007) Law Society of British Columbia
- [Equity and Diversity – The Law Society of Manitoba](#)
- [Model Policies & Guides – Lawyer | Law Society of Ontario \(lso.ca\)](#)

### Documents

Ruck, Douglas, KC (October 29, 2024) [Regaining Trust: Systemic Discrimination in Nova Scotia's Legal Community](#) (The Ruck Report)

[Articling Survey 2024 Results | Nova Scotia Barristers' Society](#)

[Racial Equity Survey Report released | Nova Scotia Barristers' Society](#)

Abella, Rosalie Silberman (October 1984) [Report of the Commission on Equality in Employment](#)

Babiuk, Buchert, Chiekwe & Hong (November 2014) "[Cultural Competency and Diversity in the Nova Scotia Legal Profession: Final Summary Report](#)"

[Nova Scotia Barristers Society – Gender Equity Committee Final Report – May, 2022.](#)

Dumke, Kathryn and Kevin Hong (July 2015) [Equity and Diversity in Legal Practice.](#)

[National – Improving inclusion for gender-diverse people \(nationalmagazine.ca\).](#)

[Lawyers Discuss LGBT Barriers | News | The Harvard Crimson \(thecrimson.com\).](#)

[‘Kindness can accomplish everything:’ Lawyers discuss LGBTQ2+ inclusion in the workplace | Law Times \(lawtimesnews.com\).](#)

[Report: Addressing discriminatory barriers facing Aboriginal law students and lawyers, April 2000 \(lawsociety.bc.ca\).](#)

[BLAC Report on Education: Redressing Inequity – Empowering Black Learners](#) (1994) Black Learners Advisory Committee (BLAC)

[Working Together For Change: Strategies To Address Issues Of Systemic Racism In The Legal Professions](#) (lawsocietyontario.azureedge.net)

[Equality and Diversity](#) (November 2014) Solicitors Regulation Authority

[SRA | Encouraging equality, diversity and inclusion | Solicitors Regulation Authority](#)

[Report of the Commission on Equality in Employment / Judge Rosalie Silberman Abella, commissioner.: MP43-157/1-1984E-PDF – Government of Canada Publications – Canada.ca](#)

[Equity & Access Resources – Nova Scotia Barristers' Society \(nsbs.org\)](#).

[Microsoft Word – CLA Womens Study February 2016 Final.docx \(criminallawyers.ca\)](#).

[2009-final-report-of-the-indigenous-bar-consultation\\_1.pdf \(lawsocietyontario.azureedge.net\)](#).

[Fostering Employment Equity and Diversity in the Nova Scotia Legal Profession \(August 2000\) Employment Equity Guidelines Committee: Nova Scotia Barristers' Society](#)

[Guidelines\\_GenderVariantInclusion.pdf \(nsbs.org\)](#).

[Lawyers with Disabilities: Overcoming Barriers to Equality \(2004\) Disability Research Working Group, Law Society of British Columbia](#)

[Accommodation Works! \(chrc-ccdp.gc.ca\)](#).

[Royal Commission on the Donald Marshall, Jr., Prosecution: digest of finding and recommendations](#) Nova Scotia. Royal Commission on the Donald Marshall, Jr., Prosecution, December 1989

[Touchstones for Change: Equality, Diversity and Accountability \(1993\) Task Force on Gender Equality in the Legal Profession: Canadian Bar Association](#)

## Case Law

*Andrews v. Law Society of British Columbia*, [\[1989\] 1 SCR 143](#), 1989 CanLII 2 (SCC)

*British Columbia (Public Service Employee Relations Commission) v. BCGSEU*, [\[1999\] 3 SCR 3](#)

*Cardinal v. Douglas College and another*, [2013 BCHRT 64](#) (CanLII)

*E.J. v. Catholic Children's Aid Society of Toronto*, [2014 ONSC 3277](#) (CanLII)

*Fraser v. Canada (Attorney General)*, [2020 SCC 28](#)

*Gichuru v. The Law Society of British Columbia (No. 9)*, [2011 BCHRT 185](#) (CanLII)

*Johal v. Dhesi*, [2012 BCSC 550](#) (CanLII)

*Law Society of Upper Canada v. Terence John Robinson*, [2013 ONLSAP 18](#) (CanLII)

*McCormick v. Fasken Martineau DuMoulin LLP*, [2014 SCC 39](#)

*Moore v. British Columbia (Education)*, [\[2012\] 3 SCR 360](#), 2012 SCC 61 (CanLII)

*R. v. Armitage*, [2015 ONCJ 64](#) (CanLII)

*R. v. Fraser*, [2011 NSCA 70](#) (CanLII)

*R. v. Gladue*, [\[1999\] 1 SCR 688](#), 1999 CanLII 679 (SCC)

*R. v. Kapp*, [\[2008\] 2 SCR 483](#), 2008 SCC 41 (CanLII)

*R. v. Kennedy*, [2013 ONSC 6419](#) (CanLII)

*R. v. S. (R.D.)*, [\[1997\] 3 SCR 484](#), 1997 CanLII 324 (SCC)

*R. v. Spence*, [\[2005\] 3 SCR 458](#), 2005 SCC 71 (CanLII)

*R. v. Twoyoungmen*, [1998 ABPC 135](#) (CanLII)

*R. v. "X"*, [2014 NSPC 95](#) (CanLII)

*Withler v. Canada (Attorney General)*, [2011 SCC 12](#)

**Revised by Council on June 12, 2026**

## Standards

- ▶ Record Retention and Maintenance of Electronic Data
- ▶ Client Service and Communication
- ▶ Lawyers' Fees
- ▶ Cloud Computing
- ▶ Equity, Diversity, Inclusion and Accessibility

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# #7 – Succession Planning


LIANS » Standards » Law Office Management Standards » #7 – Succession Planning

## Standard

1. A lawyer must have a written and accessible plan to protect clients and client property<sup>1</sup> in the event of the cessation of the lawyer's practice.<sup>2</sup>
2. A law firm must have a written and accessible plan that includes the practices of all lawyers in the firm, and should contemplate the practices of all lawyers in the firm ceasing simultaneously.<sup>3</sup>
3. A lawyer or law firm must review annually its succession plan and update it as appropriate.<sup>4</sup>
4. A lawyer or law firm must include in their succession plan information and adequate arrangements to allow for the handling of clients and management of the practice<sup>5</sup> with minimal interruption<sup>6</sup>.

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## Notes

1. See generally Rule 3.5 (Preservation of Client's Property) of the Nova Scotia Barristers' Society, *Code of Professional Conduct*, Halifax: Nova Scotia Barristers' Society, 2012 ("the Code"). These duties are closely related to 

and should be read in conjunction with Rule 3.3 of the Code addressing confidential information.


2. Subregulations 4.6.1, 4.6.2, and 4.6.5 of the [Regulations made pursuant to the Legal Profession Act](#), S.N.S 2004, c.28
3. Subregulations 4.6.4
4. Subregulation 4.6.4
5. Subregulation 4.6.6
6. Rule 3.7 of the Code outlines lawyer's duties relating to withdrawal from representation. While this Rule generally does not contemplate those circumstances where a succession plan might be effected – i.e. death, illness, disaster / unforeseen business interruption – the duties outlined in Rule 3.7-8 (Manner of Withdrawal), speaking to minimizing client expense and avoiding prejudice, are relevant to both the practice successor and succeeding lawyer.

## Practice Notes

### Introduction

Clients can be seriously inconvenienced or prejudiced if a lawyer or firm fails to have an adequate succession plan in place that contemplates all possible scenarios in which a law practice may cease to operate (e.g. death, temporary and long term illness, unforeseen business interruption). In addition, there are significant costs to the Society when lawyers leave behind paper files and trust funds with no successor in place.

The Society is taking multi-pronged approach to encouraging and supporting all practices to have functional succession plans:

- Succession plans are now required under the Regulations (pursuant to the *Legal Profession Act*).
- The Society's Legal Services Support (LSS) team delivers succession planning workshops and works with members, including meeting with individual firms.
- LSS has developed supportive materials (see 'Additional Resources') including a Guide, a template succession plan, a template file retention/destruction plan, and a succession checklist. 

- Firms will reflect on succession planning when they complete their triannual self-assessment of their Management System for Ethical Legal Practice (“MSELP”).
- When new firms register with the Society, they discuss succession planning with the LSS team.
- The Society has identified a number of possible ways to make succession easier and continues looking for and working on solutions.
- The Society’s Trust Assurance team works with firms that report old balances to offer advice and encourage resolution.
- The Trust Account Working Group is exploring how lawyers can best transfer responsibility for their trust accounts at the time succession is needed.

## Development of Practice Standard

The Standard reflects the minimum requirements laid out in Regulation 4.6 (pursuant to the *Legal Profession Act*). It goes further, in providing guidance on particular issues for consideration when developing succession plans and presenting practice resources and support to assist in the process.

The Standard recognizes that each lawyer’s and firm’s succession plan should reflect their unique practice circumstances.

## Issues for Consideration

### *Circumstances and Outcomes of Practice Cessation*

Cessation of a lawyer’s practice can follow from a number of circumstances including:

- temporary disability or incapacity;
- long term disability or incapacity;
- death;
- unforeseen disaster (ie hurricane, flood).

Each of these scenarios should be contemplated by lawyers and firms when developing their succession plans.



The NSBS-LSS Succession Planning Guide suggests considering, too, the three basic outcomes for your practice at retirement, disability or death:

1. Practice wind-up
2. Practice transfer
3. Practice stays ‘intact’ and the existing firm takes responsibility.

In addition to the requirement for each lawyer to have a succession plan, law firms are also required to have a plan that includes the practices of all lawyers in the firm. In many firms, other lawyers in the firm act as natural practice successors for one another. This might not be the cases where, for example, practice expertise varies among the lawyers in a firm.

For firms of all sizes, it is important to cover succession planning in partnership agreements. Firms should include a plan for what happens in the event of a dissolution, particularly the process to follow for dealing with open client files and trust monies.

In the case of smaller practices, the firm’s succession plan must contemplate the unlikely scenario of the practices of all lawyers in the firm ceasing simultaneously.

In the case of a disaster or unforeseen circumstances that prevent entry to a physical workspace, having the firm’s files stored online and accessible – together with accessible office systems (telephones, email, etc.) means you can continue practising with minimal interruption.

Note that retirement preparation and succession planning for an emergency are closely linked. The regulatory requirements for succession planning are similar to those for a lawyer changing their practicing membership category to retired, or for resigning ones membership from the Society. (See [Application for change of category from non-practising to retired](#) and [Application for change of category from practising to resigned](#))

### ***Succession Models***

When planning your practice succession, a good place to start is considering the various models:



1. Internal: A traditional model for succession in small and sole practices is to recruit a new lawyer or clerk to take over. Increasingly, lawyers find it is difficult to attract someone who will stay long term. Firms of more than one lawyer often rely on other lawyers in the practice, especially where practice expertise aligns.
2. Sale: Another traditional approach is to arrange the sale of your practice in advance of retiring. This works best if you have unique goodwill that is transferrable and if your practice is 'clean,' including having paper and trust accounts in good order.
3. Merger: Increasingly, sole practitioners and small firms join another firm before getting to the point where a successor is needed. Some continue to operate out of their existing offices as a satellite of the merged firm. This can be a way to reduce management responsibilities and allow you to approach retirement gradually.
4. Successorship: Here, a lawyer-successor comes in at the point you are unable to practice, attends to your responsibilities and either keeps or distributes your files. Sometimes, a sale of all or part of the practice is possible, best arranged in advance.
5. Stewardship: where the responsibilities are simple enough, some lawyers prefer to use a non-lawyer (e.g. spouse, office manager...) to do most of the work to wind up their practice and then to look after file retention/destruction. A lawyer is still needed to supervise in these circumstances.

### ***Costs and Proceeds of Succession***

There are different ways to cover costs and obtain payment for you or your estate (in the event of sale):

1. Insurance is recommended if it is an option for you, even if you expect money to come in from your practice over time. If you plan to cover the costs at death or disability with insurance, you can look after your succession costs, debt and perhaps have a surplus for your estate. For example, a life insurance policy payable to your successor or firm plus an agreement to pay the balance to a beneficiary can give you peace of mind.



2. Sale: you worked out a price or valuation formula for your practice, including any transferable goodwill. You have a contract, which could be a partnership agreement or otherwise.
3. Balance after succession accomplished: your practice at succession may have receivables, WIP that can be billed, owned equipment that can be sold and surplus cash in your general account. In some instances, all or part of the practice *might* be saleable, but that's hard to do if you are not around to help with the transition. You may also have obligations: payables, accounting costs especially if you have a trust account, staff obligations, taxes etc.
4. Negative payment: you plan for your estate to pay for succession.

### ***'Adequate Arrangements' and Assigning Responsibilities***

When considering adequate arrangements to allow for the handling of clients and management of the practice, subregulation 4.6.6 points to the following specific considerations:

- (a) open and closed files;
- (b) wills and wills indices;
- (c) foundation documents and other important records;
- (d) other valuable property;
- (e) passwords and the means to access computers, email, accounting and other electronic records;
- (f) trust accounts and trust funds;
- (g) other accounts related to the member's practice; and
- (h) any other arrangements necessary to carry on or wind up the lawyer's unique practice.

Not all of these might be relevant to a particular lawyer's practice. Equally, 'any other arrangements necessary' falls to the professional judgment and discretion of the lawyer in fulfilling their obligations.



Equally important is identifying the key players in your succession (ie Executor/Trustee/POA, lawyer successor or supervisor) and ensuring that each is aware of what they are agreeing to. You should be confident they will be of sufficient capacity to do the job when the time might come. If circumstances change and this is not the case, new arrangements should be made.

Each of these considerations is discussed in more detail in the [NSBS-LSS Succession Planning Guide](#).

### ***Preparing for Succession – File Retention and Old Trust Balances***

The biggest consideration – regardless of whether you want to sell, retire, or simply prepare for contingencies – is how to make your practice more appealing to others. This means considering how you retain files (ie electronic versus paper storage) and addressing lingering obligations like open files, foundation documents, and old trust balances.


With the advent of privacy laws and changes in attitude toward paper, lawyers have to rethink their file retention/destruction practices. The reason we keep closed files is to defend against liability claims or professional responsibility complaints. Beyond that, lawyers are not archivists. Storage for other reasons, or for longer than reasonably necessary, is problematic, whether your files are paper or electronic.

See [Law Office Management Practice Standard #1 – Record Retention](#), for details on lawyers' file retention and destruction obligations.

The Society has additional resources to help and LSS team can offer guidance. See the [NSBS-LSS Succession Planning Guide](#), [File Retention/Destruction Plan Template](#), and [Targeted Paper Reduction Guide](#), in particular.

Another way to prepare is to clean up old trust account balances by working through them systematically. To start, eliminate 3+ yr old balances. Then tackle your 2+ yr old balances; then your 1+ yr old balances.

If necessary, take advantage of the periodic [applications](#) the Society makes respecting undistributed trust funds.

You can contact the Society's Trust Assurance team at 902 422 1491 or at [trustaccounts@nsbs.org](mailto:trustaccounts@nsbs.org) if you would like support, or simply have questions, about 

trust account issues including old balances.

## Additional Resources

NSBS-LSS: [Succession Planning Guide](#)

NSBS-LSS: [File Retention/Destruction Plan Template](#)

NSBS-LSS: [Succession Plan Sample](#)

NSBS-LSS: [Succession Checklist](#)

NSBS-LSS: [Sample Succession Plan for Simple Situations](#)

NSBS-LSS: [Targeted Paper Reduction Plan Guide](#)

LIANS has useful [links](#) and precedents on succession-related issues.

The [Law Society of BC](#), [Law Society of Alberta](#), and [Law Society of Ontario](#) all have sections on their websites devoted to succession, including precedents you might choose to adapt. Beware that the law and practice can be different: Ontario, for example, allows testators to have two wills.

Connect with NSBS' Legal Services Support team at 902-422-1491 or [LSS@nsbs.org](mailto:LSS@nsbs.org) to discuss your succession planning.

## Standards

- ▶ #1 – Record Retention
- ▶ #2 – Client Service and Communication
- ▶ #3 – Lawyers' Fees
- ▶ #4 – Maintenance and Backup of Electronic Data
- ▶ #5 – Cloud Computing
- ▶ #6 – Equity and Diversity



- ▶ #7 – Succession Planning
- ▶ #8 – Technological Competence

## LAWYERS' INSURANCE ASSOCIATION OF NOVA SCOTIA

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 MEMBER LOGIN

**LAWYERS' INSURANCE**  
ASSOCIATION OF NOVA SCOTIA



# #8 – Technological Competence

LIANS » Standards » Law Office Management Standards » #8 – Technological Competence

## Standard

As part of a lawyer's obligation to perform all legal services undertaken on a client's behalf to the standard of a competent lawyer, they should develop an understanding of, and ability to use, technology relevant to the nature and area of their practice and responsibilities.<sup>1</sup>

Lawyers and law firms should understand the benefits and risks associated with relevant technology<sup>2</sup> and must recognize their ethical duty<sup>3</sup> and legal obligations<sup>4</sup> to protect confidential information.

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## Footnotes

1. Rule 3.1-1 (Competence) of the Nova Scotia Barristers' Society, *Code of Professional Conduct*, Halifax: Nova Scotia Barristers' Society, 2012 ("the Code") and specifically, Commentary 4A.

2. Rule 3.1-2, Commentary 4A and 4B of the Code.

3. Rule 3.3 of the Code (Confidentiality).

4. Schedule 1 (Section 5), "Principles Set Out in the National Standard of Canada" 

Entitled Model Code for the Protection of Personal Information, CAN/CSA-Q830-96,” Personal information Protection and Electronic Documents Act, S.C. 200, c. 5; available online: <https://laws-lois.justice.gc.ca/eng/acts/p-8.6/page-7.html>

## Assessing Technological Competence

A lawyer’s required level of technological competence will depend upon whether the use or understanding of technology is necessary to the nature and area of the lawyer’s practice and responsibilities and whether the relevant technology is reasonably available to the lawyer. In determining whether technology is reasonably available, consideration should be given to factors including:

- the lawyer’s or law firm’s practice areas;
- the geographic locations of the lawyer’s or firm’s practice; and
- the requirements of clients

## Tech Competence Checklist

To assist lawyers in assessing whether they are able to fulfill their obligations of technological competence a [Tech Competence Checklist](#) has been developed. The checklist is structured as a series of questions on basic technology capabilities that the vast majority of lawyers should be generally familiar with in order to function independently. This is not intended to be an exhaustive list, and in some instances the identified capabilities listed may not be necessary based on the nature of a practice. Once a lawyer has completed the Checklist, it is recommended to review all questions with a “No” answer and to utilize the following list of external resources and training materials to address any such knowledge gaps. The following list of resources has been organized to coincide with the sections contained within the Checklist.

## Tech Competence Resources

### 1. Email (Outlook; Gmail; Apple Mail)

<p><b>“Best practices for Outlook”</b></p>	<p><a href="https://support.microsoft.com/en-us/office/best-practices-for-outlook-f90e5f69-8832-4d89-95b3-bfdf76c82ef8">https://support.microsoft.com/en-us/office/best-practices-for-outlook-f90e5f69-8832-4d89-95b3-bfdf76c82ef8</a></p>
<p><b>“How to encrypt email in Outlook”</b></p>	<p><a href="https://support.microsoft.com/en-us/office/encrypt-email-messages-373339cb-bf1a-4509-b296-802a39d801dc">https://support.microsoft.com/en-us/office/encrypt-email-messages-373339cb-bf1a-4509-b296-802a39d801dc</a></p> 

<b>“How to send secure email in Outlook”</b>	<a href="https://trustifi.com/how-to-send-secure-email-in-outlook/">https://trustifi.com/how-to-send-secure-email-in-outlook/</a>
<b>“How to Organize Your Inbox in Outlook”</b>	<a href="https://www.lifewire.com/create-folders-outlook-com-1170657">https://www.lifewire.com/create-folders-outlook-com-1170657</a>
<b>“8 TIPS FOR SMARTER COMMUNICATIONS WITH OUTLOOK”</b>	<a href="https://tomorrowsva.com/8-tips-for-smarter-communications-with-outlook/">https://tomorrowsva.com/8-tips-for-smarter-communications-with-outlook/</a>
<b>“Organize your inbox: using Outlook for Email Management”</b>	<a href="https://support.microsoft.com/en-us/office/organize-your-inbox-9aea8ad7-883d-459b-a3ea-ae20f06cfb32">https://support.microsoft.com/en-us/office/organize-your-inbox-9aea8ad7-883d-459b-a3ea-ae20f06cfb32</a>
<b>“Microsoft Outlook for Legal Professionals”</b>	<a href="https://www.lawtechnologytoday.org/2021/08/microsoft-outlook-for-legal-professionals/">https://www.lawtechnologytoday.org/2021/08/microsoft-outlook-for-legal-professionals/</a>
<b>“iCloud Mail User Guide”</b>	<a href="https://support.apple.com/en-ca/guide/mail/welcome/mac">https://support.apple.com/en-ca/guide/mail/welcome/mac</a>
<b>“iCloud Mail: Set up an email alias”</b>	<a href="https://support.apple.com/en-us/HT201771">https://support.apple.com/en-us/HT201771</a>
<b>“iCloud Mail: Add an email signature”</b>	<a href="https://support.apple.com/en-ca/guide/icloud/mm6b1a3290/icloud">https://support.apple.com/en-ca/guide/icloud/mm6b1a3290/icloud</a>
<b>“iCloud Mail: use rules to manage your inbox:</b>	<a href="https://support.apple.com/en-ca/guide/icloud/mm6b1a3f8a/icloud">https://support.apple.com/en-ca/guide/icloud/mm6b1a3f8a/icloud</a>
<b>“iCloud Mail: Forward email to another account”</b>	<a href="https://support.apple.com/en-ca/guide/icloud/mm6b1a3960/icloud">https://support.apple.com/en-ca/guide/icloud/mm6b1a3960/icloud</a>
<b>“iCloud Mail: delete and recover emails in Mail on iPhone”</b>	<a href="https://support.apple.com/en-ca/guide/iphone/iphb02be90ba/ios">https://support.apple.com/en-ca/guide/iphone/iphb02be90ba/ios</a>
<b>“iCloud Mail: Make a sender a VIP in Mail on iCloud.com”</b>	<a href="https://support.apple.com/en-ca/guide/icloud/mma27f86124d/icloud">https://support.apple.com/en-ca/guide/icloud/mma27f86124d/icloud</a>



<b>“iCloud Mail: Use Mail Drop to send large files”</b>	<a href="https://support.apple.com/en-ca/guide/icloud/mm6b1a7a10/icloud">https://support.apple.com/en-ca/guide/icloud/mm6b1a7a10/icloud</a>
<b>“iCloud Mail: Use Markup in Mail”</b>	<a href="https://support.apple.com/en-ca/guide/mail/mlhl98889a61/mac">https://support.apple.com/en-ca/guide/mail/mlhl98889a61/mac</a>
<b>“iCloud Mail: Use iCloud Mail with non-Apple email clients”</b>	<a href="https://support.apple.com/en-ca/HT202304">https://support.apple.com/en-ca/HT202304</a>

## 2. Calendar and Scheduling (Outlook; Google Calendar; Apple Calendar)

<b>“Introduction to the Outlook Calendar”</b>	<a href="https://support.microsoft.com/en-us/office/introduction-to-the-outlook-calendar-d94c5203-77c7-48ec-90a5-2e2bc10bd6f8">https://support.microsoft.com/en-us/office/introduction-to-the-outlook-calendar-d94c5203-77c7-48ec-90a5-2e2bc10bd6f8</a>
<b>“Outlook Quick Start Guide”</b>	<a href="https://www.customguide.com/cheat-sheet/outlook-quick-reference.pdf">https://www.customguide.com/cheat-sheet/outlook-quick-reference.pdf</a>
<b>“How to Use Outlook for Project Management”</b>	<a href="https://www.makeuseof.com/use-microsoft-outlook-for-project-management/">https://www.makeuseof.com/use-microsoft-outlook-for-project-management/</a>
<b>“Google Calendar Help Center”</b>	<a href="https://support.google.com/calendar/?hl=en#topic=10509740">https://support.google.com/calendar/?hl=en#topic=10509740</a>
<b>“Google Calendar Keyboard Shortcuts”</b>	<a href="https://support.google.com/calendar/answer/37034?hl=en">https://support.google.com/calendar/answer/37034?hl=en</a>
<b>“24 Google Calendar Hacks”</b>	<a href="https://www.productiveblogging.com/google-calendar-hacks/">https://www.productiveblogging.com/google-calendar-hacks/</a>
<b>“The Ultimate Guide to Google Calendar”</b>	<a href="https://www.calendar.com/google-calendar-guide/">https://www.calendar.com/google-calendar-guide/</a>
<b>“How to Sync Google Calendar with Other Calendars”</b>	<a href="https://www.dummies.com/article/technology/notable-websites/google/how-to-sync-multiple-calendars-using-google-calendar-142877/">https://www.dummies.com/article/technology/notable-websites/google/how-to-sync-multiple-calendars-using-google-calendar-142877/</a>

“The ultimate Apple Calendar user guide”	<a href="https://calendly.com/blog/apple-calendar">https://calendly.com/blog/apple-calendar</a>
“Apple Calendar: The Ultimate Guide”	<a href="https://savvyca.com/articles/apple-calendar/">https://savvyca.com/articles/apple-calendar/</a>
“10 Tips for Mastering Apple Calendar”	<a href="https://www.pcmag.com/how-to/10-tips-for-mastering-apple-calendar">https://www.pcmag.com/how-to/10-tips-for-mastering-apple-calendar</a>
“10 gotta-know calendar tips for iOS”	<a href="https://www.macworld.com/article/225601/10-gotta-know-calendar-tips-for-ios.html">https://www.macworld.com/article/225601/10-gotta-know-calendar-tips-for-ios.html</a>

### 3. Document Management (OpenText eDOCS; NetDocuments; iManage)

“10 gotta-know calendar tips for iOS”	<a href="https://www.macworld.com/article/225601/10-gotta-know-calendar-tips-for-ios.html">https://www.macworld.com/article/225601/10-gotta-know-calendar-tips-for-ios.html</a>
“11 ideas for how to organize digital files”	<a href="https://www.microsoft.com/en-us/microsoft-365/business-insights-ideas/resources/11-ideas-for-how-to-organize-digital-files">https://www.microsoft.com/en-us/microsoft-365/business-insights-ideas/resources/11-ideas-for-how-to-organize-digital-files</a>
“Best document management software (2023”	<a href="https://www.techradar.com/best/best-document-management-software">https://www.techradar.com/best/best-document-management-software</a>
“A Beginner’s Guide to Digital Document Management”:	<a href="https://www.fool.com/the-ascent/small-business/document-management/articles/business-document-management/">https://www.fool.com/the-ascent/small-business/document-management/articles/business-document-management/</a>
“Digital Tools for Lawyers: a Complete Beginner’s Guide”	<a href="https://blog.avoteca.com/articles/en/a-complete-beginners-guide-to-digital-tools-for-lawyers/">https://blog.avoteca.com/articles/en/a-complete-beginners-guide-to-digital-tools-for-lawyers/</a>
“The Best Document	<a href="https://www.pcmag.com/picks/the-best-document-management-software">https://www.pcmag.com/picks/the-best-document-management-software</a>

<b>Management Systems”</b>	
<b>“The Difference Between “Digital” &amp; “Electronic” Documents”</b>	<a href="https://tiekinetix.com/en/blog/difference-between-digital-electronic-documents">https://tiekinetix.com/en/blog/difference-between-digital-electronic-documents</a>
<b>“Legal Document Management Software: The Complete Guide”</b>	<a href="https://www.altfeeco.com/resources/legal-document-management-software">https://www.altfeeco.com/resources/legal-document-management-software</a>
<b>“Document management system”</b>	<a href="https://en.wikipedia.org/wiki/Document_management_system">https://en.wikipedia.org/wiki/Document_management_system</a>
<b>“Top 8 Small Business Document Management Software (Industry Best Picks)”</b>	<a href="https://www.softr.io/blog/small-business-document-management">https://www.softr.io/blog/small-business-document-management</a>
<b>“A Beginner’s Guide to Document Management”</b>	<a href="https://www.techopedia.com/definition/23384/document-management">https://www.techopedia.com/definition/23384/document-management</a>
<b>“About iManage”</b>	<a href="https://imanager.com/about/about-imanage/">https://imanager.com/about/about-imanage/</a>
<b>“The In-House Counsel Guide To Active Legal Document Management Software”</b>	<a href="https://www.zylab.com/en/blog/the-in-house-counsel-guide-to-active-legal-document-management-software">https://www.zylab.com/en/blog/the-in-house-counsel-guide-to-active-legal-document-management-software</a>

#### 4. Word Processing (MS Word, Google Docs, Apple Pages)

MS WORD



<b>Word for Windows training</b>	<a href="https://support.microsoft.com/en-us/office/word-for-windows-training-7bcd85e6-2c3d-4c3c-a2a5-5ed8847eae73">https://support.microsoft.com/en-us/office/word-for-windows-training-7bcd85e6-2c3d-4c3c-a2a5-5ed8847eae73</a>
<b>“Word help &amp; learning”</b>	<a href="https://support.microsoft.com/en-us/word">https://support.microsoft.com/en-us/word</a>
<b>“Customize or create new styles”</b>	<a href="https://support.microsoft.com/en-us/office/customize-or-create-new-styles-d38d6e47-f6fc-48eb-a607-1eb120dec563">https://support.microsoft.com/en-us/office/customize-or-create-new-styles-d38d6e47-f6fc-48eb-a607-1eb120dec563</a>
<b>“Keyboard shortcuts in Word”</b>	<a href="https://support.microsoft.com/en-us/office/keyboard-shortcuts-in-word-95ef89dd-7142-4b50-afb2-f762f663ceb2">https://support.microsoft.com/en-us/office/keyboard-shortcuts-in-word-95ef89dd-7142-4b50-afb2-f762f663ceb2</a>
<b>“How to create templates in Microsoft Word for legal documents”</b>	<a href="https://www.onelegal.com/blog/how-to-create-templates-in-microsoft-word-for-legal-documents/">https://www.onelegal.com/blog/how-to-create-templates-in-microsoft-word-for-legal-documents/</a>
<b>“16 Microsoft Word Tips and Tricks to Work Faster and Smarter”</b>	<a href="https://www.meridianoutpost.com/resources/articles/tips-and-tricks-microsoft-word.php">https://www.meridianoutpost.com/resources/articles/tips-and-tricks-microsoft-word.php</a>
<b>“Top 13 Microsoft Word Tips for Lawyers”</b>	<a href="https://www.clio.com/blog/microsoft-word-hacks-every-lawyer-should-know/">https://www.clio.com/blog/microsoft-word-hacks-every-lawyer-should-know/</a>
<b>“Microsoft Word for Lawyers (Step-by-Step Walkthrough)”</b>	<a href="https://www.youtube.com/watch?v=RvKHWAXbWaU">https://www.youtube.com/watch?v=RvKHWAXbWaU</a>
<b>GOOGLE DOCS</b>	
<b>Google Docs Tutorial for Beginners</b>	<a href="https://helpdeskgeek.com/how-to/how-to-use-google-docs-a-beginners-guide/">https://helpdeskgeek.com/how-to/how-to-use-google-docs-a-beginners-guide/</a>
<b>Google Docs Help Center</b>	<a href="https://support.google.com/docs/#topic=1382883">https://support.google.com/docs/#topic=1382883</a>
<b>“Keyboard shortcuts for Google Docs”</b>	<a href="https://support.google.com/docs/answer/179738?hl=en&amp;co=GENIE.Platform%3DDesktop">https://support.google.com/docs/answer/179738?hl=en&amp;co=GENIE.Platform%3DDesktop</a>
<b>“How to Collaborate in Google Docs”</b>	<a href="https://zapier.com/blog/how-to-collaborate-google-docs/">https://zapier.com/blog/how-to-collaborate-google-docs/</a>



<b>APPLE PAGES</b>	
<b>Apple Pages Support</b>	<a href="https://support.apple.com/pages">https://support.apple.com/pages</a>
<b>“Use templates in Pages on Mac”</b>	<a href="https://support.apple.com/en-ca/guide/pages/tan5c52a733c/mac">https://support.apple.com/en-ca/guide/pages/tan5c52a733c/mac</a>
<b>“The 10 Best Tips for Apple Pages in 2023”</b>	<a href="https://www.lifewire.com/best-tips-for-apple-pages-app-4688650">https://www.lifewire.com/best-tips-for-apple-pages-app-4688650</a>

## 5. Tasks and Bring-Forward Systems (MS Outlook, Trello, MS Planner)

<b>Microsoft Planner</b>	<a href="https://www.microsoft.com/en-ca/microsoft-365/business/task-management-software">https://www.microsoft.com/en-ca/microsoft-365/business/task-management-software</a>
<b>“Manage your tasks in Microsoft Planner”</b>	<a href="https://support.microsoft.com/en-us/office/manage-your-tasks-in-microsoft-planner-7e3d66b4-684d-4a2f-8fbe-908c614d8314">https://support.microsoft.com/en-us/office/manage-your-tasks-in-microsoft-planner-7e3d66b4-684d-4a2f-8fbe-908c614d8314</a>
<b>“MS Outlook: How to Use Task Management Effectively”</b>	<a href="https://www.lifewire.com/how-to-use-task-management-in-outlook-1173685">https://www.lifewire.com/how-to-use-task-management-in-outlook-1173685</a>
<b>“Use Tasks in Outlook”</b>	<a href="https://support.microsoft.com/en-us/office/use-tasks-in-outlook-com-6e8a991b-ea62-4009-a7f7-62b70a57ec18">https://support.microsoft.com/en-us/office/use-tasks-in-outlook-com-6e8a991b-ea62-4009-a7f7-62b70a57ec18</a>
<b>“How To Use Tasks In Outlook To Stay Organized (With Tips)”</b>	<a href="https://www.indeed.com/career-advice/career-development/how-to-use-tasks-in-outlook">https://www.indeed.com/career-advice/career-development/how-to-use-tasks-in-outlook</a>
<b>“When to use Microsoft Project, Planner, To Do, or the Tasks app in Teams”</b>	<a href="https://support.microsoft.com/en-us/office/when-to-use-microsoft-project-planner-to-do-or-the-tasks-app-in-teams-8f950d32-d5f4-40db-a8b7-4d1b82b55e17">https://support.microsoft.com/en-us/office/when-to-use-microsoft-project-planner-to-do-or-the-tasks-app-in-teams-8f950d32-d5f4-40db-a8b7-4d1b82b55e17</a>
<b>“Trello for small law firms”</b>	<a href="https://blog.trello.com/how-palace-law-uses-trello">https://blog.trello.com/how-palace-law-uses-trello</a>
<b>“How to organize Trello Boards as a Law firm”</b>	<a href="https://community.atlassian.com/t5/Trello-questions/How-to-organize-Trello-Boards-as-a-Law-firm/qaq-p/2083644">https://community.atlassian.com/t5/Trello-questions/How-to-organize-Trello-Boards-as-a-Law-firm/qaq-p/2083644</a>
<b>“Trello: a template for client workflow</b>	<a href="https://trello.com/templates/project-management/client-workflow-management-GHFaoLVc">https://trello.com/templates/project-management/client-workflow-management-GHFaoLVc</a>

management”
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## 6. Contacts

Google Contacts Help Center	<a href="https://support.google.com/contacts/">https://support.google.com/contacts/</a>
“The ultimate guide to Android contacts management”	<a href="https://www.computerworld.com/article/3679708/android-contacts-management-ultimate-guide.html">https://www.computerworld.com/article/3679708/android-contacts-management-ultimate-guide.html</a>
“How to organize your contacts like a pro on Android”	<a href="https://www.nextpit.com/how-to-organize-your-contacts-on-android">https://www.nextpit.com/how-to-organize-your-contacts-on-android</a>
“How to Manage Contacts on Your iPhone”	<a href="https://www.lifewire.com/manage-contacts-on-iphone-578642">https://www.lifewire.com/manage-contacts-on-iphone-578642</a>
“Add and use contact information on iPhone”	<a href="https://support.apple.com/en-ca/guide/iphone/iph3e0ca2db/ios">https://support.apple.com/en-ca/guide/iphone/iph3e0ca2db/ios</a>
“Manage your contacts in Outlook for Windows”	<a href="https://support.microsoft.com/en-us/office/manage-your-contacts-in-outlook-for-windows-f03681a5-fe07-4f2c-bee6-d93d8fab0c00">https://support.microsoft.com/en-us/office/manage-your-contacts-in-outlook-for-windows-f03681a5-fe07-4f2c-bee6-d93d8fab0c00</a>

## 7. Computer Navigation and Systems (Windows, Mac, Google Chrome OS)

Google Search Guide	<a href="https://support.google.com/websearch/answer/134479?hl=en">https://support.google.com/websearch/answer/134479?hl=en</a>
Google Scholar: the ultimate guide	<a href="https://paperpile.com/g/google-scholar-guide/">https://paperpile.com/g/google-scholar-guide/</a>
Google Chrome: Create, view & edit bookmarks	<a href="https://support.google.com/chrome/answer/188842?hl=en&amp;co=GENIE.Platform=Desktop">https://support.google.com/chrome/answer/188842?hl=en&amp;co=GENIE.Platform=Desktop</a>
“Bing Advanced Search Tricks You Should Know”	<a href="https://www.lifewire.com/bing-advanced-search-3482817">https://www.lifewire.com/bing-advanced-search-3482817</a>



<b>“Bing Search Tips and Tricks to improve Search Experience”</b>	<a href="https://www.thewindowsclub.com/bing-search-tips-and-tricks">https://www.thewindowsclub.com/bing-search-tips-and-tricks</a>
<b>Safari User Guide</b>	<a href="https://support.apple.com/en-ca/guide/safari/welcome/mac">https://support.apple.com/en-ca/guide/safari/welcome/mac</a>
<b>Safari: Bookmarks</b>	<a href="https://support.apple.com/en-ca/guide/iphone/iph42ab2f3a7/ios">https://support.apple.com/en-ca/guide/iphone/iph42ab2f3a7/ios</a>
<b>DuckDuckGo</b>	<a href="https://duckduckgo.com/">https://duckduckgo.com/</a>
<b>Firefox: Learn the Basics</b>	<a href="https://support.mozilla.org/en-US/products/firefox/get-started">https://support.mozilla.org/en-US/products/firefox/get-started</a>
<b>Firefox: Bookmarks</b>	<a href="https://support.mozilla.org/en-US/kb/bookmarks-firefox">https://support.mozilla.org/en-US/kb/bookmarks-firefox</a>
<b>FindLaw</b>	<a href="https://www.findlaw.com/">https://www.findlaw.com/</a>

## 8. Computer Navigation and Systems (Windows, Mac, Google Chrome OS)

<b>Microsoft Community (Guide to Windows and Other Microsoft Products)</b>	<a href="https://answers.microsoft.com/en-us">https://answers.microsoft.com/en-us</a>
<b>Windows help &amp; learning</b>	<a href="https://support.microsoft.com/en-us/windows">https://support.microsoft.com/en-us/windows</a>
<b>“Quick Start Guides for Windows 10, Surface Book, and Microsoft Edge”</b>	<a href="https://support.microsoft.com/en-us/microsoft-edge/quick-start-guides-for-windows-10-surface-book-and-microsoft-edge-4e603411-16ad-73f7-0923-5aa3d327bb59">https://support.microsoft.com/en-us/microsoft-edge/quick-start-guides-for-windows-10-surface-book-and-microsoft-edge-4e603411-16ad-73f7-0923-5aa3d327bb59</a>
<b>“20 tips and tricks for Windows 11”</b>	<a href="https://www.techradar.com/news/20-tips-and-tricks-for-windows-11">https://www.techradar.com/news/20-tips-and-tricks-for-windows-11</a>
<b>“How to use multiple monitors in Windows”</b>	<a href="https://support.microsoft.com/en-us/windows/how-to-use-multiple-monitors-in-windows-329c6962-5a4d-b481-7baa-bec9671f728a">https://support.microsoft.com/en-us/windows/how-to-use-multiple-monitors-in-windows-329c6962-5a4d-b481-7baa-bec9671f728a</a>
<b>“How to Use Multiple Monitors to Be More Productive”</b>	<a href="https://www.howtogeek.com/174452/beginner-geek-how-to-use-multiple-monitors-to-be-more-productive/">https://www.howtogeek.com/174452/beginner-geek-how-to-use-multiple-monitors-to-be-more-productive/</a>

<b>“Change or reset your Windows password”</b>	<a href="https://support.microsoft.com/en-us/windows/change-or-reset-your-windows-password-8271d17c-9f9e-443f-835a-8318c8f68b9c">https://support.microsoft.com/en-us/windows/change-or-reset-your-windows-password-8271d17c-9f9e-443f-835a-8318c8f68b9c</a>
<b>macOS User Guide</b>	<a href="https://support.apple.com/en-ca/guide/mac-help/welcome/mac">https://support.apple.com/en-ca/guide/mac-help/welcome/mac</a>
<b>ChromeOS</b>	<a href="https://www.google.com/chromebook/chrome-os/">https://www.google.com/chromebook/chrome-os/</a>
<b>“The Verge guide to Chrome OS and Chromebooks”</b>	<a href="https://www.theverge.com/2019/11/4/18514843/google-chromebook-os-how-to-app-customize">https://www.theverge.com/2019/11/4/18514843/google-chromebook-os-how-to-app-customize</a>
<b>“Multi-Factor Authentication: Who Has It and How to Set It Up”</b>	<a href="https://www.pcmag.com/how-to/multi-factor-authentication-2fa-who-has-it-and-how-to-set-it-up">https://www.pcmag.com/how-to/multi-factor-authentication-2fa-who-has-it-and-how-to-set-it-up</a>

## 9. Video Conferencing (Zoom, MS Teams)

<b>Microsoft Teams – Introduction</b>	<a href="https://support.microsoft.com/en-us/office/get-started-with-microsoft-teams-b98d533f-118e-4bae-bf44-3df2470c2b12?wt.mc_id=otc_microsoft_teams#">https://support.microsoft.com/en-us/office/get-started-with-microsoft-teams-b98d533f-118e-4bae-bf44-3df2470c2b12?wt.mc_id=otc_microsoft_teams#</a>
<b>Microsoft Teams – Training</b>	<a href="https://support.microsoft.com/en-us/office/microsoft-teams-video-training-4f108e54-240b-4351-8084-b1089f0d21d7">https://support.microsoft.com/en-us/office/microsoft-teams-video-training-4f108e54-240b-4351-8084-b1089f0d21d7</a>
<b>Microsoft Teams – Quick Start</b>	<a href="https://learn.microsoft.com/en-us/microsoftteams/get-started-with-teams-quick-start">https://learn.microsoft.com/en-us/microsoftteams/get-started-with-teams-quick-start</a>
<b>“21 Microsoft Teams Tips and Tricks the Experts Rely On”</b>	<a href="https://www.ntiva.com/blog/microsoft-teams-tips-and-tricks">https://www.ntiva.com/blog/microsoft-teams-tips-and-tricks</a>
<b>Teams for Beginners (Videos)</b>	<a href="https://www.bing.com/videos/search?q=teams+for+beginners&amp;qpv=teams+for+beginners&amp;FORM=VDRE">https://www.bing.com/videos/search?q=teams+for+beginners&amp;qpv=teams+for+beginners&amp;FORM=VDRE</a>
<b>Zoom – Introduction</b>	<a href="https://support.zoom.us/hc/en-us/articles/360034967471-Getting-started-guide-for-new-users">https://support.zoom.us/hc/en-us/articles/360034967471-Getting-started-guide-for-new-users</a>



<b>and Getting Started</b>	
<b>Zoom – Rooms User Guide</b>	<a href="https://support.zoom.us/hc/en-us/articles/204772869-Zoom-Rooms-User-Guide">https://support.zoom.us/hc/en-us/articles/204772869-Zoom-Rooms-User-Guide</a>
<b>“The complete Zoom guide: From basic help to advanced tips and tricks”</b>	<a href="https://www.zdnet.com/article/zoom-101-a-starter-guide-for-beginners-plus-advanced-tips-and-tricks-for-pros/">https://www.zdnet.com/article/zoom-101-a-starter-guide-for-beginners-plus-advanced-tips-and-tricks-for-pros/</a>
<b>“18 Zoom tips and tricks for better video meetings”</b>	<a href="https://zapier.com/blog/zoom-tips/">https://zapier.com/blog/zoom-tips/</a>

## 10. Spreadsheets (MS Excel, Google Sheets)

<b>“Excel help and learning”</b>	<a href="https://support.microsoft.com/en-us/excel">https://support.microsoft.com/en-us/excel</a>
<b>“Basic tasks in Excel”</b>	<a href="https://support.microsoft.com/en-us/office/basic-tasks-in-excel-dc775dd1-fa52-430f-9c3c-d998d1735fca">https://support.microsoft.com/en-us/office/basic-tasks-in-excel-dc775dd1-fa52-430f-9c3c-d998d1735fca</a>
<b>“Keyboard shortcuts in Excel”</b>	<a href="https://support.microsoft.com/en-us/office/keyboard-shortcuts-in-excel-1798d9d5-842a-42b8-9c99-9b7213f0040f">https://support.microsoft.com/en-us/office/keyboard-shortcuts-in-excel-1798d9d5-842a-42b8-9c99-9b7213f0040f</a>
<b>“Excel functions (by category)”</b>	<a href="https://exceljet.net/formulas">https://exceljet.net/formulas</a>
<b>“Overview of Excel tables”</b>	<a href="https://support.microsoft.com/en-us/office/overview-of-excel-tables-7ab0bb7d-3a9e-4b56-a3c9-6c94334e492c">https://support.microsoft.com/en-us/office/overview-of-excel-tables-7ab0bb7d-3a9e-4b56-a3c9-6c94334e492c</a>
<b>“Create a PivotTable to analyze worksheet data”</b>	<a href="https://support.microsoft.com/en-us/office/create-a-pivottable-to-analyze-worksheet-data-a9a84538-bfe9-40a9-a8e9-f99134456576">https://support.microsoft.com/en-us/office/create-a-pivottable-to-analyze-worksheet-data-a9a84538-bfe9-40a9-a8e9-f99134456576</a>



<b>“How to use Google Sheets”</b>	<a href="https://support.google.com/docs/answer/6000292?hl=en&amp;co=GENIE.Platform=Desktop">https://support.google.com/docs/answer/6000292?hl=en&amp;co=GENIE.Platform=Desktop</a>
<b>“The Beginner’s Guide to Google Sheets”</b>	<a href="https://www.howtogeek.com/425040/the-beginners-guide-to-google-sheets/">https://www.howtogeek.com/425040/the-beginners-guide-to-google-sheets/</a>
<b>Numbers for Mac</b>	<a href="https://www.apple.com/numbers/">https://www.apple.com/numbers/</a>
<b>Smartsheet</b>	<a href="https://www.smartsheet.com/">https://www.smartsheet.com/</a>

## 11. Presentations (MS PowerPoint, Google Slides, Keynote)

<b>“PowerPoint for Windows training”</b>	<a href="https://support.microsoft.com/en-us/office/powerpoint-for-windows-training-40e8c930-cb0b-40d8-82c4-bd53d3398787">https://support.microsoft.com/en-us/office/powerpoint-for-windows-training-40e8c930-cb0b-40d8-82c4-bd53d3398787</a>
<b>“A beginner’s guide to Microsoft Powerpoint”</b>	<a href="https://www.canto.com/blog/how-to-use-microsoft-powerpoint/">https://www.canto.com/blog/how-to-use-microsoft-powerpoint/</a>
<b>“Get started with PowerPoint for the web”</b>	<a href="https://support.microsoft.com/en-us/office/get-started-with-powerpoint-for-the-web-6303da7a-402a-4300-8b1c-160e8940cc34">https://support.microsoft.com/en-us/office/get-started-with-powerpoint-for-the-web-6303da7a-402a-4300-8b1c-160e8940cc34</a>
<b>“Find the perfect PowerPoint presentation template”</b>	<a href="https://create.microsoft.com/en-us/powerpoint-templates">https://create.microsoft.com/en-us/powerpoint-templates</a>
<b>“Basic tasks for creating a PowerPoint presentation”</b>  <b>“Play music across multiple slides in your slide show”</b>	<a href="https://support.microsoft.com/en-us/office/basic-tasks-for-creating-a-powerpoint-presentation-efbbc1cd-c5f1-4264-b48e-c8a7b0334e36">https://support.microsoft.com/en-us/office/basic-tasks-for-creating-a-powerpoint-presentation-efbbc1cd-c5f1-4264-b48e-c8a7b0334e36</a>  <a href="https://support.microsoft.com/en-us/office/play-music-across-multiple-slides-in-your-slide-show-b01ded6a-28c8-473a-971a-6dfa92cc9367#:~:text=On%20the%20Insert%20tab%2C%20select,tab%2C%20select%20Play%20in%20Background.">https://support.microsoft.com/en-us/office/play-music-across-multiple-slides-in-your-slide-show-b01ded6a-28c8-473a-971a-6dfa92cc9367#:~:text=On%20the%20Insert%20tab%2C%20select,tab%2C%20select%20Play%20in%20Background.</a>
<b>“How to Make a Flowchart in PowerPoint”</b>	<a href="https://www.free-power-point-templates.com/articles/how-to-create-">https://www.free-power-point-templates.com/articles/how-to-create-</a>

	<a href="#">flowcharts-in-powerpoint/</a>
<b>“Google Slides Training and Help”</b>	<a href="https://support.google.com/a/users/answer/9282488?hl=en">https://support.google.com/a/users/answer/9282488?hl=en</a>
<b>“10 quick tips to spice up your Google Slides presentations”</b>	<a href="https://airtame.com/blog/google-slides-tips/">https://airtame.com/blog/google-slides-tips/</a>
<b>“How to add audio to Google Slides”</b>	<a href="https://speechify.com/blog/how-to-add-audio-google-slides/?landing_url=https%3A%2F%2Fspeechify.com%2Fblog%2Fhow-to-add-audio-google-slides%2F">https://speechify.com/blog/how-to-add-audio-google-slides/?landing_url=https%3A%2F%2Fspeechify.com%2Fblog%2Fhow-to-add-audio-google-slides%2F</a>
<b>“Keynote User Guide”</b>	<a href="https://support.apple.com/en-ca/guide/keynote/welcome/mac">https://support.apple.com/en-ca/guide/keynote/welcome/mac</a>
<b>“How to Use Apple Keynote (Ultimate Tutorial Guide)”</b>	<a href="https://business.tutsplus.com/series/how-to-use-apple-keynote-ultimate-tutorial-guide-cms-1295">https://business.tutsplus.com/series/how-to-use-apple-keynote-ultimate-tutorial-guide-cms-1295</a>
<b>“10 Expert Tips to Create and Deliver a Killer Keynote Presentation”</b>	<a href="https://piktochart.com/blog/tips-keynote-presentation/">https://piktochart.com/blog/tips-keynote-presentation/</a>

## 12. PDFs (Adobe, Power PDF)

<b>Adobe Acrobat</b>	<a href="https://acrobat.adobe.com/us/en/acrobat.html">https://acrobat.adobe.com/us/en/acrobat.html</a>
<b>Power PDF</b>	<a href="https://www.kofax.com/Products/power-pdf">https://www.kofax.com/Products/power-pdf</a>
<b>Nitro PDF</b>	<a href="https://www.gonitro.com/">https://www.gonitro.com/</a>
<b>PDF-XChange Editor</b>	<a href="https://www.tracker-software.com/product/pdf-xchange-editor">https://www.tracker-software.com/product/pdf-xchange-editor</a>
<b>Foxit PhantomPDF</b>	<a href="https://www.foxitsoftware.com/pdf-editor/">https://www.foxitsoftware.com/pdf-editor/</a>
<b>SimpleOCR</b>	<a href="https://www.simpleocr.com/">https://www.simpleocr.com/</a>
<b>Readiris</b>	<a href="https://www.irislink.com/EN-US/c1696/Readiris-16—OCR-Software.aspx">https://www.irislink.com/EN-US/c1696/Readiris-16—OCR-Software.aspx</a> 

<p><b>“How to Convert a Microsoft Word Document to a PDF”</b></p>	<p><a href="https://www.howtogeek.com/352668/how-to-convert-a-microsoft-word-document-to-a-pdf/">https://www.howtogeek.com/352668/how-to-convert-a-microsoft-word-document-to-a-pdf/</a></p>
<p><b>“Page thumbnails and bookmarks in PDFs”</b></p>	<p><a href="https://helpx.adobe.com/ca/acrobat/using/page-thumbnails-bookmarks-pdfs.html">https://helpx.adobe.com/ca/acrobat/using/page-thumbnails-bookmarks-pdfs.html</a>.</p>
<p><b>“Create a table of contents with hyperlinks in Word”</b></p>	<p><a href="https://support.microsoft.com/en-us/office/insert-a-table-of-contents-882e8564-0edb-435e-84b5-1d8552ccf0c0#:~:text=On%20the%20toolbar%20ribbon%2C%20select%20page%20numbering%20in%20your%20document">https://support.microsoft.com/en-us/office/insert-a-table-of-contents-882e8564-0edb-435e-84b5-1d8552ccf0c0#:~:text=On%20the%20toolbar%20ribbon%2C%20select%20page%20numbering%20in%20your%20document</a>.</p>
<p><b>“How to Search for Text Inside Multiple PDF Files at Once”</b></p>	<p><a href="https://www.online-tech-tips.com/computer-tips/how-to-search-for-text-inside-multiple-pdf-files-at-once/#:~:text=Search%20Multiple%20PDF%20Files%20Using%20Acrobat%20Reader%201,in%20the%20prompt%20on%20your%20screen.%20See%20More">https://www.online-tech-tips.com/computer-tips/how-to-search-for-text-inside-multiple-pdf-files-at-once/#:~:text=Search%20Multiple%20PDF%20Files%20Using%20Acrobat%20Reader%201,in%20the%20prompt%20on%20your%20screen.%20See%20More</a>.</p>

### 13. Printing

<p><b>“Print a document in Word”</b></p>	<p><a href="https://support.microsoft.com/en-us/office/print-a-document-in-word-591022c4-53e3-4242-95b5-58ca393ba0ee#:~:text=Select%20File%20%E2%Print, the%20page%20to%20enlarge%20it">https://support.microsoft.com/en-us/office/print-a-document-in-word-591022c4-53e3-4242-95b5-58ca393ba0ee#:~:text=Select%20File%20%E2%Print, the%20page%20to%20enlarge%20it</a>.</p>
<p><b>“How To Print Anything From Your Phone or Tablet, No Laptop Required”</b></p>	<p><a href="https://gizmodo.com/how-print-phone-tablet-ios-android-ipad-no-laptop-app-1850114790">https://gizmodo.com/how-print-phone-tablet-ios-android-ipad-no-laptop-app-1850114790</a></p>
<p><b>“Use AirPrint to print from your iPhone or iPad”</b></p>	<p><a href="https://support.apple.com/en-ca/HT201387#:~:text=Open%20the%20app%20that%20you,User%20Guide%20or%20Help%20section">https://support.apple.com/en-ca/HT201387#:~:text=Open%20the%20app%20that%20you,User%20Guide%20or%20Help%20section</a>.</p>



<b>“Set up printer for Chromebook”</b>	<a href="https://support.google.com/chromebook/answer/7225252?hl=en">https://support.google.com/chromebook/answer/7225252?hl=en</a>
<b>“How to print in Windows 10”</b>	<a href="https://www.techadvisor.com/article/726406/how-to-print-in-windows-10.html#:~:text=In%20most%20cases%2C%20go%20to,in%20place%20a%20print%20but%20ton.">https://www.techadvisor.com/article/726406/how-to-print-in-windows-10.html#:~:text=In%20most%20cases%2C%20go%20to,in%20place%20a%20print%20but%20ton.</a>
<b>“How to Clear a Paper Jam”</b>	<a href="https://www.wikihow.com/Clear-a-Paper-Jam">https://www.wikihow.com/Clear-a-Paper-Jam</a>
<b>“How to Fix a Paper Jam”</b>	<a href="https://www.quill.com/content/index/resource-center/technology/faq/how-to-fix-a-paper-jam/default.cshtml">https://www.quill.com/content/index/resource-center/technology/faq/how-to-fix-a-paper-jam/default.cshtml</a>
<b>“How to Load a Bottom Feed Printer”</b>	<a href="https://smallbusiness.chron.com/load-bottom-feed-printer-57163.html">https://smallbusiness.chron.com/load-bottom-feed-printer-57163.html</a>

#### 14. Practice/Case Management (Amicus, Clio, PracticePanther)

<b>Clio</b>	<a href="https://www.clio.com/">https://www.clio.com/</a>
<b>Prolaw</b>	<a href="https://legal.thomsonreuters.com/en/products/prolaw">https://legal.thomsonreuters.com/en/products/prolaw</a>
<b>Aderant</b>	<a href="https://www.aderant.com/">https://www.aderant.com/</a>
<b>Amicus Attorney</b>	<a href="https://www.amicusattorney.com/">https://www.amicusattorney.com/</a>
<b>Practice Panther</b>	<a href="https://www.practicepanther.com/">https://www.practicepanther.com/</a>
<b>“The Best Legal Case Management Software”</b>	<a href="https://lawyerist.com/reviews/law-practice-management-software/">https://lawyerist.com/reviews/law-practice-management-software/</a>
<b>“20 Best Legal Case Management Software Programs for Small and Medium Law Firms”</b>	<a href="https://financesonline.com/top-20-legal-case-management-software-programs-small-medium-law-firms/">https://financesonline.com/top-20-legal-case-management-software-programs-small-medium-law-firms/</a>

#### 15. Scanning

<b>Adobe Scan</b>	<a href="https://acrobat.adobe.com/us/en/mobile/scanner-app.html">https://acrobat.adobe.com/us/en/mobile/scanner-app.html</a>	
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<b>CamScanner</b>	<a href="https://www.camscanner.com/">https://www.camscanner.com/</a>
<b>Dropbox (camera upload feature)</b>	<a href="https://help.dropbox.com/create-upload/camera-uploads-overview">https://help.dropbox.com/create-upload/camera-uploads-overview</a>
<b>Evernote Scannable</b>	<a href="https://evernote.com/products/scannable/">https://evernote.com/products/scannable/</a>
<b>Genius Scan</b>	<a href="https://thegrizzlylabs.com/genius-scan/">https://thegrizzlylabs.com/genius-scan/</a>
<b>Microsoft Office Lens</b>	<a href="https://support.microsoft.com/en-us/office/office-lens-for-windows-577ec09d-8da2-4029-8bb7-12f8114f472a">https://support.microsoft.com/en-us/office/office-lens-for-windows-577ec09d-8da2-4029-8bb7-12f8114f472a</a>
<b>Scanner Pro</b>	<a href="https://readdle.com/scannerpro">https://readdle.com/scannerpro</a>
<b>TurboScan</b>	<a href="https://turboscanapp.com/">https://turboscanapp.com/</a>
<b>Zoho Scanner</b>	<a href="https://www.zoho.com/docscanner/">https://www.zoho.com/docscanner/</a>

## 16. Mobile Devices

<b>“How to Connect Your Android Device to Wi-Fi”</b>	<a href="https://support.google.com/android/answer/9075847?hl=en">https://support.google.com/android/answer/9075847?hl=en</a>
<b>“Connect to Wi-Fi on your iPhone, iPad, or iPod touch”</b>	<a href="https://support.apple.com/en-us/HT202639">https://support.apple.com/en-us/HT202639</a>
<b>“How to install Android apps”</b>	<a href="https://www.androidcentral.com/how-install-android-apps">https://www.androidcentral.com/how-install-android-apps</a>
<b>“Delete, disable &amp; manage unused apps on Android”</b>	<a href="https://support.google.com/googleplay/answer/2521768?hl=en">https://support.google.com/googleplay/answer/2521768?hl=en</a>
<b>“Download apps on your iPhone or iPad”</b>	<a href="https://support.apple.com/en-ca/HT204266">https://support.apple.com/en-ca/HT204266</a>
<b>“Delete apps on your iPhone, iPad, and iPod touch”</b>	<a href="https://support.apple.com/en-us/HT207618">https://support.apple.com/en-us/HT207618</a>

## 17. Internet and Networks



<b>“Five Public Wi-Fi Tips, If You Must Use One: Cybersecurity Best Practices”</b>	<a href="https://ediscoverytoday.com/2022/10/21/five-public-wi-fi-tips-if-you-must-use-one-cybersecurity-best-practices/">https://ediscoverytoday.com/2022/10/21/five-public-wi-fi-tips-if-you-must-use-one-cybersecurity-best-practices/</a>
<b>“Public Wi-Fi: An ultimate guide on the risks + how to stay safe.”</b>	<a href="https://us.norton.com/blog/privacy/public-wifi">https://us.norton.com/blog/privacy/public-wifi</a>
<b>“Simple Steps to Protect Yourself on Public Wi-Fi”</b>	<a href="https://www.wired.com/story/public-wifi-safety-tips/">https://www.wired.com/story/public-wifi-safety-tips/</a>
<b>“How to Avoid Public WiFi Security Risks”</b>	<a href="https://www.kaspersky.com/resource-center/preemptive-safety/public-wifi-risks">https://www.kaspersky.com/resource-center/preemptive-safety/public-wifi-risks</a>
<b>“Security tips for organizations with remote workers”</b>	<a href="https://www.cyber.gc.ca/en/guidance/telework-security-issues-itsap10016">https://www.cyber.gc.ca/en/guidance/telework-security-issues-itsap10016</a>

## 18. Digital Signatures (DocuSign)

<b>Adobe Sign</b>	<a href="https://acrobat.adobe.com/us/en/sign.html">https://acrobat.adobe.com/us/en/sign.html</a>
<b>DocuSign</b>	<a href="https://www.docusign.com/">https://www.docusign.com/</a>
<b>HelloSign</b>	<a href="https://www.hellosign.com/">https://www.hellosign.com/</a>
<b>SignNow</b>	<a href="https://www.signnow.com/">https://www.signnow.com/</a>
<b>SignEasy</b>	<a href="https://getsigneasy.com/">https://getsigneasy.com/</a>

## 19. Cloud-Based Tools

<b>Dropbox</b>	<a href="https://www.dropbox.com/">https://www.dropbox.com/</a>
<b>Google Drive</b>	<a href="https://www.google.com/drive/">https://www.google.com/drive/</a>
<b>Microsoft OneDrive</b>	<a href="https://www.microsoft.com/en-ca/microsoft-365/onedrive/online-cloud-storage">https://www.microsoft.com/en-ca/microsoft-365/onedrive/online-cloud-storage</a>
<b>Box</b>	<a href="https://www.box.com/">https://www.box.com/</a>



<b>Citrix ShareFile</b>	<a href="https://www.sharefile.com/">https://www.sharefile.com/</a>
<b>“5 Best Practices for Cloud Security”</b>	<a href="https://azure.microsoft.com/en-us/resources/five-best-practices-for-cloud-security/">https://azure.microsoft.com/en-us/resources/five-best-practices-for-cloud-security/</a>
<b>“Collaborate securely across organizational boundaries and Microsoft clouds”</b>	<a href="https://techcommunity.microsoft.com/t5/microsoft-entra-azure-ad-blog/collaborate-securely-across-organizational-boundaries-and/ba-p/3094109">https://techcommunity.microsoft.com/t5/microsoft-entra-azure-ad-blog/collaborate-securely-across-organizational-boundaries-and/ba-p/3094109</a>

## 20. Time Entry (Timekeep, ProLaw)

<b>ProLaw</b>	<a href="https://legal.thomsonreuters.com/en/products/prolaw">https://legal.thomsonreuters.com/en/products/prolaw</a>
<b>Clio</b>	<a href="https://www.clio.com/">https://www.clio.com/</a>
<b>ProLaw: Firm Central and Time &amp; Billing Explainer</b>	<a href="https://legal.thomsonreuters.com/en/products/firm-central/time-billing">https://legal.thomsonreuters.com/en/products/firm-central/time-billing</a>
<b>“Employee timekeeping software”</b>	<a href="https://www.adp.com/resources/articles-and-insights/articles/t/timekeeping-software.aspx">https://www.adp.com/resources/articles-and-insights/articles/t/timekeeping-software.aspx</a>
<b>“10 Ways Clio Simplifies Lawyer Time Tracking”</b>	<a href="https://www.clio.com/blog/lawyer-time-tracking/">https://www.clio.com/blog/lawyer-time-tracking/</a>
<b>“The 5 best time tracking apps in 2023”</b>	<a href="https://zapier.com/blog/best-time-tracking-apps/">https://zapier.com/blog/best-time-tracking-apps/</a>

## 21. Financial Management (Aderant, 3E, Clio)

<b>Aderant</b>	<a href="https://www.aderant.com/">https://www.aderant.com/</a>
<b>ProLaw</b>	<a href="https://www.elite.com/products/prolaw/">https://www.elite.com/products/prolaw/</a>
<b>Clio</b>	<a href="https://www.clio.com/">https://www.clio.com/</a>
<b>“Why your law department needs a budget”</b>	<a href="https://legal.thomsonreuters.com/en/insights/articles/drafting-a-law-department-budget">https://legal.thomsonreuters.com/en/insights/articles/drafting-a-law-department-budget</a>




“Planning the first budget for a new law firm”	<a href="https://legal.thomsonreuters.com/en/insights/articles/steps-for-planning-a-new-law-department-budget">https://legal.thomsonreuters.com/en/insights/articles/steps-for-planning-a-new-law-department-budget</a>
“Year-End Law Firm Accounting: Everything You Need to Know”	<a href="https://www.clio.com/resources/legal-accounting/year-end-law-firm-financial-best-practices/">https://www.clio.com/resources/legal-accounting/year-end-law-firm-financial-best-practices/</a>
“A Complete Guide to Law Firm Structure & Effective Management”	<a href="https://www.clio.com/blog/law-firm-management/">https://www.clio.com/blog/law-firm-management/</a>
“Business Case: Building a better legal budget”	<a href="https://www.canadianlawyermag.com/news/general/business-case-building-a-better-legal-budget/267126">https://www.canadianlawyermag.com/news/general/business-case-building-a-better-legal-budget/267126</a>
“How to create (and stick with) a project budget”	<a href="https://asana.com/resources/project-budget">https://asana.com/resources/project-budget</a>

## 22. Research

CanLII	<a href="https://www.canlii.org/en/">https://www.canlii.org/en/</a>
Lexis Advance Quicklaw	<a href="https://www.lexisnexis.ca/en-ca/products/lexis-advance-quicklaw.page">https://www.lexisnexis.ca/en-ca/products/lexis-advance-quicklaw.page</a>
WestlawNext Canada	<a href="https://www.westlawcanada.com/home/">https://www.westlawcanada.com/home/</a>
HeinOnline	<a href="https://home.heinonline.org/">https://home.heinonline.org/</a>
Wolters Kluwer / CCH Online	<a href="https://www.cch.ca/products/cch-online/">https://www.cch.ca/products/cch-online/</a>

## Assessing Risks and Benefits of Technology

Technology is capable of supporting law practices in numerous ways, but also presents risks that can expose lawyers to potential liability to their clients if they do not fully appreciate the risks and strategies to mitigate those risks. Lawyers 

should not only assess their technological competence and improve their knowledge with the above resources, but they should also inform themselves of these risk mitigation strategies. One such additional tool is the [NSBS Cloud Computing Checklist](#) contained as a resource under Law Office Management [Standard #5: Cloud Computing](#).

## Protecting Confidential Information

Whether through the naming of a Chief Privacy Officer and implementing a formal privacy management program at larger firms, or the sole practitioner assuming these responsibilities on their own, to be technological competent lawyers and law firms have a duty to understand the purpose behind how personal information is collected, used, disclosed, retained, and destroyed over the course of managing their practice – and to dedicate resources to meet these obligations.

Specifically, lawyers and law firms should consider the following actions when approaching privacy compliance under PIPEDA:

- Ensuring clients know the reasons behind your collection of their personal information (e.g., conflict checks) and securing their informed consent.
- Developing clear retention policies so clients understand their personal information will only be retained for as long as is needed to finalize the retainer, work on the file, etc.
- Advising clients about how their personal information could be used and disclosed for secondary purposes and understanding the level of consent that could be required.
- Creating a system for clients to access their personal information upon written request.
- Establishing security safeguards to protect the personal information of your clients; these could include physical and technical measures (e.g., access controls and limitations depending on practice areas; IT resources to enhance cybersecurity resiliency, etc.)
- Maintaining a formal data breach response plan and notification process if/when necessary.



- Understanding any additional obligations that may arise when transferring clients' personal information outside of Nova Scotia (e.g., provincial privacy laws in Quebec and Alberta; potential new laws in Ontario and B.C.), and Canada.
- Developing and implementing a privacy management program that includes formal policies and procedures to specifically outline how the lawyer and law firm protect personal information, deal with complaints, train staff, and explain these processes in plain language.
- Implement a compliance system to deal with any future federal privacy commissioner audit request.

### Artificial Intelligence

- See NSBS [Artificial Intelligence in the Practice of Law](#)
- [Professional-responsibility-and-AI.pdf \(lawsociety.bc.ca\)](#).

### Technology and Accommodations for Persons with Disabilities

- Web Content Accessibility Guidelines ([WCAG](#))
- Federal government [Standard on Web Accessibility](#)
- Nova Scotia [Accessibility Directorate](#)
- Nova Scotia [Accessibility Act](#)

### Cyber Security Resources

- [Cybersecurity | NIST](#)
- [Canadian Centre for Cyber Security](#)
- [Cyber security – Canada.ca](#)
- [Blog Posts \(cisecurity.org\)](#).

Approved by Council on April 26, 2024

# Standards



- ▶ #1 – Record Retention
- ▶ #2 – Client Service and Communication
- ▶ #3 – Lawyers’ Fees
- ▶ #4 – Maintenance and Backup of Electronic Data
- ▶ #5 – Cloud Computing
- ▶ #6 – Equity and Diversity
- ▶ #7 – Succession Planning
- ▶ #8 – Technological Competence

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