

# RISK MANAGEMENT FOR LEGAL SUPPORT STAFF



RISK MANAGEMENT PRACTICE GUIDE OF LAWYERS MUTUAL

# Risk Management for Legal Support Staff

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## RISK MANAGEMENT PRACTICE GUIDE OF LAWYERS MUTUAL

A law office is a team.

Like all teams, success depends on communication, cooperation and commitment.

Paralegals and legal assistants are key members of the team. They are often the ones who have the most day-to-day interaction with clients. They are the first point of public contact.

Paralegals do the little – and big – things that keep a law office running. They train new hires and put out fires. They hold the hands of anxious clients. They take phone calls and answer questions.

They become the public face of the firm.

### How to Use this Guide

This Lawyers Mutual Practice Guide will help you maximize the rewards and minimize the risks of support staff. It is designed as a tool for firms that currently have paralegals and legal assistants as well as those looking to hire staff.

Here are some suggested uses:

- To instruct staff on legal ethics and risk management.
- To create job descriptions for paralegals and legal assistants.
- To develop staff hiring criteria.
- To help with staff orientation.
- To help with staff training.
- To use as a topic at a firm meeting or retreat.
- To use as curriculum for in-house continuing education.

This Guide offers general information that should benefit most practices. It is not intended as legal advice or opinion, nor does it purport to establish a specific standard of care for your practice.

Every law office is different. Your support staff needs are unique. This Guide suggests ways to bring out the best in your support staff.

For more information – or if you have additional questions – please contact Lawyers Mutual’s Client Services Team.

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## LAWYERS MUTUAL LIABILITY INSURANCE COMPANY OF NORTH CAROLINA

5020 Weston Parkway, Suite 200, Cary, North Carolina 27513

Post Office Box 1929, Cary, North Carolina 27512-1929

919.677.8900 | 800.662.8843 | 919.677.9641 FAX | [www.lawyersmutualinc.com](http://www.lawyersmutualinc.com)

## TABLE OF CONTENTS

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|   |    |
|---|----|
| Why Bother With Support Staff Ethics?                                       | 1  |
| Definition of Paralegal and Legal Assistant                                 | 2  |
| Ethical Guidelines for Effectively Using Paralegals                         | 3  |
| Avoiding Unauthorized Practice of Law                                       | 5  |
| N.C. State Bar Paralegal Certification                                      | 6  |
| NALA Code of Ethics and Professional Responsibility                         | 7  |
| Typical Duties of Paralegals  | 8  |
| The Three C's: Communication, Confidentiality, and<br>Conflicts of Interest | 9  |
| Important North Carolina Ethics Opinions for<br>Support Staff               | 11 |
| Helpful Links and Resources   | 14 |

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**DISCLAIMER:** *This document is written for general information only. It presents some considerations that might be helpful in your practice. It is not intended as legal advice or opinion. It is not intended to establish a standard of care for the practice of law. There is no guarantee that following these guidelines will eliminate mistakes. Law offices have different needs and requirements. Individual cases demand individual treatment. Due diligence, reasonableness and discretion are always necessary. Sound risk management is encouraged in all aspects of practice.*

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## Why Bother With Support Staff Ethics?

Although the buck stops with the lawyer responsible for a case, it is important to make sure your support staff is up to ethical speed as well.

Here are a dozen reasons why:

1. Each year, Lawyers Mutual sees claims that are directly attributed to errors by support staff.
2. Examples include title errors, incorrect calendaring, failure to follow-up on projects, poorly-drafted pleadings, mistakes in filing documents and missed statutes of limitations.
3. Legal assistants help manage cases. Crossing the line of what is proper and improper for an assistant to do can lead to a charge of unauthorized practice of law.
4. Poor client relations – sometimes involving support staff – can lead to a malpractice claim against the firm.
5. A friendly, receptive voice and an empathetic ear create a positive impression for the entire firm and head off potential problems down the road.
6. Although the attorney is ultimately liable for mistakes that happen in the firm, support staff is a key part of the risk management effort.
7. It is no defense to a malpractice claim or grievance to point fingers and say, “My paralegal did it.”
8. Support staff has a direct interest in avoiding problems. A malpractice claim or disciplinary complaint – even frivolous ones that are dismissed – sap resources and energy that could otherwise go to hiring new staff, paying salaries and buying equipment.
9. Claims create stress, frustration and distraction, which can create a negative work environment.
10. Legal assistants can be fired for errors that lead to a malpractice claim or grievance.
11. A strong ethical foundation is key to a safe and successful firm.
12. An ethical law office is a great place to work.

## Definition of Paralegal and Legal Assistant

The following definition is from the American Bar Association: A “legal assistant or paralegal” is a person, qualified by education, training or work experience who is employed or retained by a lawyer, law office, corporation, governmental agency or other entity and who performs specifically delegated substantive legal work for which a lawyer is responsible.

The National Association of Legal Assistants (NALA), a leading organization of paralegals and legal assistants, has adopted the ABA’s definition.

NALA has added the following language:

“Legal assistants, also known as paralegals, are a distinguishable group of persons who assist attorneys in the delivery of legal services. Through formal education, training and experience, legal assistants have knowledge and expertise regarding the legal system and substantive and procedural law which qualify them to do work of a legal nature under the supervision of an attorney.”



### PRACTICE POINTERS:

- There is no mandatory course of study or certifying exam to qualify one as a legal assistant or a paralegal.
- Lawyers are not required to hire legal assistants with any specific educational prerequisites or certifications.
- Information about paralegal education and certification programs may assist a lawyer in hiring and using legal assistants effectively.
- The N.C. State Bar has a Paralegal Certification Program (see below). The program requires a minimum level of education to become a “North Carolina Certified Paralegal” as well as continuing education to maintain the certification.
- Membership in professional associations is encouraged to enhance professionalism, build a network, and provide CLE programs and volunteer opportunities.

#### For more information:

- N.C. State Bar Paralegal Certification <http://www.nccertifiedparalegal.gov/faq.asp>
- NCBA Paralegal Division <http://www.ncbar.org/members/divisions/paralegals/>
- NCAJ Paralegal Division <http://www.ncaj.com>
- NCADA Paralegal Division <http://ncada.paralegal.division>
- N.C. Paralegal Association <http://www.ncparalegal.org/ethics>
- NALA (National Association of Legal Associates) <https://www.nala.org/certification>



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## Ethical Guidelines For Effectively Using Paralegals

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Paralegals, like lawyers, should be held to the highest ethical and professional standards.

The State Bar regulates the activities of paralegals indirectly through each lawyer's professional duty to supervise paralegals, other employees and contractors. The statutes on unauthorized practice of law (Chapter 84 of the North Carolina General Statutes), Rules 5.3 and 5.5 of the Rules of Professional Conduct, and the formal ethics opinions interpreting those rules determine the extent to which law-related tasks may properly be performed by paralegals.

The State Bar has also published a set of Guidelines

for the proper use of paralegals and legal assistants. You can download a complete manuscript of the Guidelines from the State Bar's website. Contact the State Bar with specific questions.

The Guidelines do not change the Rules of Professional Conduct or formal ethics opinions. They are intended to facilitate the proper use of paralegals in a law firm by clarifying a lawyer's professional responsibilities when supervising a paralegal. They also assemble in one document the applicable standards (with comments) for paralegals. To the extent there may be any inconsistencies, the Rules of Professional Conduct – not the Guidelines – govern the conduct of a lawyer.



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### N.C. State Bar Guidelines For Using Nonlawyers in Rendering Legal Services

1. A lawyer shall not permit an assistant to engage in the practice of law. [Note: see the following section for more details on the Unauthorized Practice of Law, including specific activities that are prohibited.]
2. A lawyer shall not permit an assistant to appear on behalf of a client in a deposition, in court or before any agency or board, in person or on the record, unless permitted by the North Carolina General Statutes and a rule of a particular court, agency or board.
3. A lawyer shall require that an assistant disclose that he or she is not a lawyer when necessary to avoid misrepresentation.
4. A partner in a law firm shall make reasonable efforts to ensure that the firm has in effect measures giving reasonable assurance that the assistant's conduct is compatible with the professional obligations of the lawyer.
5. A lawyer having direct supervisory authority over an assistant shall make reasonable efforts to ensure that the assistant's conduct is compatible with the professional obligations of the lawyer.

6. A lawyer shall maintain an active and direct relationship with the client, supervise the assistant's performance of duties, and remain fully responsible for the work performed.
7. A lawyer shall ensure that no interest or relationship of the assistant impinges upon the services rendered to the client.
8. A lawyer may charge a client for legal work performed by a legal assistant but shall not form a partnership or other business entity with an assistant for the practice of law.
9. A lawyer's letterhead or a business card may include the name of a non-lawyer assistant if the assistant's capacity is clearly indicated and the document is otherwise neither false nor misleading.
10. A lawyer may use a non-lawyer, non-employee freelance legal assistant if the lawyer adequately supervises the non-lawyer's work.



## PRACTICE POINTERS:

- A lawyer is responsible for the professional conduct of a paralegal performing services at the lawyer's direction.
- A lawyer is required to give appropriate and active supervision. The supervising lawyer is responsible for the paralegal's work product.
- A lawyer is responsible for taking reasonable steps to ensure that client confidences are preserved and protected by a paralegal.
- A lawyer may charge for the work performed by a paralegal, provided the fee is not clearly excessive.
- A lawyer may compensate a paralegal based on the quality and quantity of the paralegal's work but cannot share legal fees with a paralegal. The paralegal's compensation may not be contingent upon the outcome of a particular case or paid in exchange for referring clients.
- A lawyer may delegate management of a trust account to a paralegal. However, the lawyer remains professionally responsible for the safekeeping of all trust account funds. The lawyer is also responsible for compliance with the record-keeping and accountings required by the Rules of Professional Conduct.
- A lawyer who employs a paralegal should facilitate the paralegal's professional improvement by encouraging and supporting the paralegal's participation in professionalism, continuing education and pro bono activities. Lawyers should also encourage paralegals to seek certification by the North Carolina State Bar's Board of Paralegal Certification or other reputable program.

For more information, visit our website [www.lawyersmutualinc.com](http://www.lawyersmutualinc.com) and click on "client services/risk management resources."

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## Avoiding Unauthorized Practice of Law

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North Carolina General Statute § 84-2.1 defines the practice of law. A related statute – N.C.G.S. § 84-4 – prohibits anyone other than a lawyer from practicing law.

The definition of “practicing law” is quite broad. It covers everything from performing legal services to giving legal advice.

Here are some activities and responsibilities that almost always fall under the heading of “practicing law” and may not be delegated to a paralegal:

- Establishing a client-lawyer relationship;
- Setting the terms of a client-lawyer relationship;
- Giving oral or written legal advice;
- Offering a legal opinion;
- Interpreting legal documents;
- Appearing in any court proceeding unless authorized by law.



### PRACTICE POINTERS:

Here are two court rulings that define the practice of law:

“The practice of law involves not only appearance in court in connection with litigation, but also services rendered out of court, and includes giving of advice or the rendering of any service requiring the use of legal skill or knowledge, such as preparing a will, contract or other instrument, the legal effect of which under the facts and conclusions involved must be carefully determined.” *Davies v. Unauthorized Practice Committee of State Bar of Texas*, 431 S.W.2d 590, at 593 (Tex. Civ. App., 1968).

“The practice of law includes ‘all advice to clients, and all actions taken for them in matters connected with the law.’ . . . Practice of law includes the giving of legal advice and counsel, and the preparation of legal instruments and contracts of which legal rights are secured.” *In re Welch*, 185 A.2d 458, 459 (Vt. 1962).

Here are three tests to help determine whether an activity is considered the practice of law:

1. The professional judgment test. Does the activity require a lawyer’s special training and skills? Is it of such complexity that only a person trained as a lawyer should be permitted to do it?
2. The traditional areas of practice test. Is the conduct commonly understood as the practice of law? Would an attorney traditionally perform it?
3. The incidental legal services test. Is the activity essentially legal in nature or is it a law-related adjunct to some business routine? For example, filling out a simple legal document incidental to a banking or real estate transaction, for which no separate fee is charged, would likely not constitute the practice of law under this definition, says Therese A. Cannon in *Ethics and Professional Responsibility for Legal Assistants*, N.C. Bar Association (1996).



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## N.C. State Bar Paralegal Certification

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North Carolina has a program for certification of paralegals. View it at [www.nccertifiedparalegal.org](http://www.nccertifiedparalegal.org).

The plan is self-funded and voluntary. It provides incentives to North Carolina paralegals to meet a minimum level of education to become a “North Carolina Certified Paralegal” and a minimum level of continuing education to maintain the certification.

The Paralegal Certification Program does not restrict the use of the term “paralegal” nor does it differentiate the services that can be provided by a certified versus a non-certified paralegal. It does, however, offer valuable proof of paralegal competency, and it enhances the quality of legal services provided by North Carolina paralegals.



- The purpose of the Paralegal Certification Program is to assist in the delivery of legal services to the public by identifying individuals who are qualified by education and training and have demonstrated knowledge, skill, and proficiency to perform substantive legal work under the direction and supervision of a licensed lawyer.
- Another goal of the program is to improve the competency of paralegals by requiring mandatory continuing legal education as a condition of certification.
- The program includes non-lawyers who are authorized by applicable state or federal law to provide services directly to the public.
- The program gives attorneys a benchmark for hiring practices. At a minimum, it identifies candidates who have shown a desire for professional proficiency and advancement.
- The program is intended to improve the quality of legal services and reduce ethical violations, unauthorized practice of law and malpractice claims.
- Attorneys are not prevented from hiring paralegals who are uncertified.
- Attorneys may publicize the employment of a certified paralegal.

**For more information:**

- N.C. State Bar <http://www.nccertifiedparalegal.gov/faq.asp>

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## NALA Code of Ethics and Professional Responsibility

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The National Association of Legal Assistants (NALA) has adopted a Code of Ethics and Professional Responsibility, which it calls “a general guide intended to aid paralegals and attorneys.” You can view it here.

Canon 1 of the Code says: “A paralegal must not perform any of the duties that attorneys only may perform nor take any actions that attorneys may not take.”



### PRACTICE POINTERS:

- Proper delegation and appropriate supervision are key. The attorney is ultimately responsible to the client and assumes professional responsibility for the work product. (Canon 2)
- Appearances are important. “A paralegal must not: (a) engage in, encourage, or contribute to any act which could constitute the unauthorized practice of law; and (b) establish attorney-client relationships, set fees, give legal opinions or advice or represent a client before a court or agency unless so authorized by that court or agency; and (c) engage in conduct or take any action which would assist or involve the attorney in a violation of professional ethics or give the appearance of professional impropriety.” (Canon 3)
- Paralegals must not render independent legal judgment. This is the attorney’s role. (Canon 4)
- Full disclosure can head off potential problems. Paralegals should disclose their professional status at the outset of any relationship with a client, attorney, court, administrative agency or member of the general public. (Canon 5)
- Continuing education keeps skills sharp. Paralegals are encouraged to maintain integrity and a high degree of competency through education and training in procedural and substantive areas of law. (Canon 6)
- Ethical rules are paramount. A paralegal must act in accordance with rules of ethics, relevant statutes and court rules. (Canon 9)

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## Typical Duties of Paralegals

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Here are some typical functions paralegals and legal assistants perform, according to the Bureau of Labor Statistics:

- Investigate the facts of a case
- Conduct legal research
- Enter case information in computer databases
- Write reports to help lawyers prepare for trials
- Draft correspondence
- Draft documents like settlement agreements, contracts and mortgages
- Get affidavits and other formal statements that may be used as evidence in court
- Help lawyers during trials
- Assist in case evaluation and strategy
- Oversee team projects
- Delegate work to other paralegals
- Manage databases
- Assist in discovery, including electronic discovery
- Organize files and oversee document storage
- Manage systems

In solo practices and small firms, paralegals might end up doing a little of everything.

In larger firms and organizations, they may be assigned to a specific practice group. Or they may work mostly on a particular phase of a case, rather than handling matters from beginning to end.

For more information: Bureau of Labor Statistics <http://www.bls.gov/ooh/Legal/Paralegals-and-legal-assistants.htm#tab-2>

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## The Three C's: Communication, Confidentiality and Conflicts of Interest

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Many potential ethical pitfalls can be avoided by training paralegals on the importance of three considerations: communication, confidentiality and conflicts of interest.

### A) Communication

Clear and consistent communication is necessary in any successful relationship.

Supervising lawyers should tell paralegals what is expected of them and what they can and cannot do. Paralegals must be encouraged to ask questions and speak up when problems arise.



Here are suggested ways legal assistants can respond to commonly asked client questions:

**Client question:** How is my case going?

Appropriate paralegal response: I really can't advise you on such matters, but I will let the lawyer know what you have asked and one of us will get back to you.

**NOTE:** It is one thing to report on the status of the case with a response, such as "the complaint has been filed" or "the discovery is ongoing." But a subjective response like "the case is going very well" could be seen as offering legal advice.

**Client question:** Do I have a case? How much is my case worth?

Appropriate paralegal response: Evaluation of your case takes time. Once the lawyer is able to do so, you will be told the strengths and weaknesses of your case and what its potential value may be.

### B) Confidentiality

Every member of a law firm, from senior partner to the file clerk, is obligated to protect the privacy of clients. Disclosure of a client confidence is a serious error. Penalties may include immediate termination of employment or other disciplinary action.

Confidential information covers a lot of ground. It is not limited to merely what a client tells you. It also precludes unauthorized discussions of case strategy, evidence – and perhaps even the client's identity.



### PRACTICE POINTERS:

- Don't discuss business outside the office.
- Never discuss a case with another client.
- Avoid water cooler conversations.
- Refer all media inquiries to the attorney. Decisions about what to say to the press should be made by the lawyer.
- Remember law is a profession, not merely a business. The attorney-client relationship is built on mutual trust and confidence. Clients deserve respect for their privacy.
- Be especially cautious in office sharing arrangements. Keep files segregated.
- Beware of gossip with employees of other firms.
- Remember that your duty of confidentiality continues after the case is closed. It also continues after you leave the firm.
- Be wary when visitors want to use an attorney's office to work or make calls. Make sure no files or documents are in sight.
- Never release information without proper authorization.
- Take care with email. Address it properly. Be sure to attach the right documents.
- Watch out for the "reply to all" button.
- Be careful when disposing of confidential papers, including drafts or duplicates. Use shredders or other secure disposal methods.

### C) Conflicts of Interest

A paralegal must disclose to his or her employer or prospective employer any pre-existing client or personal relationship that may conflict with the interests of the employer or prospective employer and/or their clients. (Canon 8 of NALA Code of Ethics and Professional Responsibility)

A conflict of interest can arise from conditions inside or outside the firm. It can pop up in individual cases. It can happen even though you have done nothing wrong.



### PRACTICE POINTERS:

- Even if there is no conflict at the start of a case, keep your radar on as the matter proceeds – and even after it ends. Some conflicts appear over time. Others may arise after the matter is concluded.
- Have a system to check for conflicts of interest.
- Take action at the slightest hint of a conflict. Discuss the situation with a senior partner. Don't just keep silent and look the other way.
- Full disclosure and client consent can often defuse a sticky situation and prevent a costly malpractice claim.
- Review N.C. State Bar Rules of Professional Conduct 1.7 through 1.11 at your next staff meeting.

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## Important Ethics Opinions Pertaining to Legal Assistants

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### Actions Performed by a Paralegal or Legal Assistant

- **RPC 70** – Communicating With a Claims Adjuster. A legal assistant may communicate and negotiate with a claims adjuster if directly supervised by the attorney for whom he or she works.
- **RPC 147** – Paying a Percentage of Fees as a Bonus. An attorney may not pay a percentage of fees to a paralegal as a bonus.
- **RPC 183** – Examining Witnesses at a Deposition. A lawyer may not permit a legal assistant to examine or represent a witness at a deposition.
- **2000 Formal Ethics Opinion 10** – Delivering a Message at Calendar Call. A lawyer may have a non-lawyer employee deliver a message to a court holding calendar call, if the lawyer is unable to attend due to a scheduling conflict with another court or other legitimate reason.
- **2005 Formal Ethics Opinion 2** – Representing Social Security Claimants. A law firm that employs a non-lawyer to represent Social Security claimants must so disclose to prospective clients and in any advertising for this service.
- **2005 Formal Ethics Opinion 6** – Compensating Paralegals in Social Security Disability Cases. The compensation of a non-lawyer law firm employee who represents Social Security disability claimants before the Social Security Administration may be based upon the income generated by such representation.
- **2006 Formal Ethics Opinion 13** – Signing a Lawyer’s Name to Pleadings. A lawyer may allow a paralegal to sign his name to court documents so long as it does not violate any law and the lawyer provides the appropriate level of supervision.
- **2007 Formal Ethics Opinion 12** – Outsourcing Legal Support Services. A lawyer may outsource limited legal support services to a foreign lawyer or a non-lawyer, provided the lawyer properly selects and supervises the foreign assistants, ensures the preservation of client confidences, avoids conflicts of interests, discloses the outsourcing, and obtains the client’s advanced informed consent.
- **2009 Formal Ethics Opinion 10** – Paralegal’s Role in Unemployment Hearings. A lawyer must provide appropriate supervision to a non-lawyer appearing pursuant to N.C. Gen. Stat. A796-17(b) on behalf of a claimant or an employer in an unemployment hearing.

### Protection of Confidential Information

- **RPC 133** – Recycling Law Office Waste Paper. A law firm may make its waste paper available for recycling.
- **RPC 215** – Confidentiality and Cell Phones. When using a cellular or cordless telephone or any other unsecure method of communication, a lawyer must take steps to minimize the risk that confidential information may be disclosed.
- **RPC 252** – Inadvertently Disclosed Information. A lawyer in receipt of materials that appear on their face to be subject to the attorney-client privilege or otherwise confidential, which were inadvertently sent to the lawyer by the opposing party or opposing counsel, should refrain from examining the materials and return them to the sender.
- **2009 Formal Ethics Opinion 3** – Protecting the Confidentiality of Clients of a Previous Employer. A lawyer has a professional obligation not to encourage or allow a non-lawyer employee to disclose confidences of a previous employer's clients for purposes of solicitation.

### Potential Conflicts of Interest Arising From Non-Lawyer Employees

- **RPC 19** – Secretary Called As Witness. A lawyer may represent grantees of deeds he drafted even though his secretary may be called as a witness.
- **RPC 74** – No Disqualification Because of Paralegal's Previous Employment. A firm which employs a paralegal is not disqualified from representing an interest adverse to that of a party represented by the firm for which the paralegal previously worked.
- **RPC 88** – Secretary Who Works Part-Time as Real Estate Broker. A lawyer may close a real estate transaction brokered by a real estate firm which employs the attorney's secretary as a part-time real estate broker.
- **RPC 102** – Improper Influence of Court Reporter. A lawyer may not permit the employment of court reporting services to be influenced by the possibility that the lawyer's employees might receive premiums, prizes or other personal benefits.
- **RPC 176** – No Disqualification Because of Paralegal's Previous Employment. A lawyer who employs a paralegal is not disqualified from representing a party whose interests are adverse to that of a party represented by a lawyer for whom the paralegal previously worked.

**Role of a Non-Lawyer in Real Estate Transactions**

- **RPC 29** – Supervision of Title Search. An attorney may not rely upon title information from a non-lawyer assistant without direct supervision by said attorney.
- **RPC 88** – Secretary Who Works Part-Time as Real Estate Broker. A lawyer may close a real estate transaction brokered by a real estate firm which employs the attorney’s secretary as a part-time real estate broker.
- **RPC 216** – Using Independent Contractor for Title Search. A lawyer may use the services of a non-lawyer independent contractor to search a title provided the non-lawyer is properly supervised by the lawyer.
- **98 Formal Ethics Opinion 8** – Title Opinion Prepare by Non-Lawyer Lacking Supervision. A lawyer may not participate in a closing or sign a preliminary title opinion if, after reasonable inquiry, the lawyer believes that the title abstract or opinion was prepared by a non-lawyer without supervision by a licensed North Carolina lawyer.
- **99 Formal Ethics Opinion 6** – Ownership of Title Insurance Agency. Opinion examines the ownership of a title insurance agency by lawyers in North and South Carolina as well as the supervision of an independent paralegal.
- **2001 Formal Ethics Opinion 4** – Presence of Lawyer at Real Estate Closing. Competent legal representation of a borrower requires the presence of the lawyer at the closing of a residential real estate refinancing. A non-lawyer may oversee the execution of documents outside the presence of the lawyer provided the lawyer adequately supervises the non-lawyer and is present at the closing conference to complete the transaction.
- **2001 Formal Ethics Opinion 8**. Competent practice requires the physical presence of the lawyer at a residential real estate closing conference.
- **2002 Formal Ethics Opinion 9**. A non-lawyer assistant supervised by a lawyer may identify to the client who is a party to such a transaction the documents to be executed with respect to the transaction, direct the client as to the correct place on each document to sign, and handle the disbursement of proceeds for a residential real estate transaction, even though the supervising lawyer is not physically present.



## Helpful Links and Resources

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The following publications, articles and internet links are good starting places to learn more about how paralegals can improve your law practice.

Recognize, however, that change is a constant in the law. New information arrives daily. While we have made an effort to select resources that have a long shelf-life, some articles that are timely today might be outdated tomorrow.

Independent research and due diligence are advised in any given situation.

- James R. Macy, *Nine Employment Privacy Traps and How to Avoid Them* (GP/Solo, July/Aug 2007) [http://www.abanet.org/genpractice/magazine/2007/jul-aug/nine\\_employment.html](http://www.abanet.org/genpractice/magazine/2007/jul-aug/nine_employment.html)
- Kathleen Brady, *Interviewing Strategies that Work* (Law Practice Today, May 2008) <http://www.abanet.org/lpm/lpt/articles/mgt05082.shtml>
- Edward Poll, *Under Water from Overhead? Here Are Ways to Keep Afloat* (Law Practice Today, March 2008) <http://www.abanet.org/lpm/lpt/articles/mtt03081.shtml>
- Edward Poll, *Making Staff Integral to Your Mission: A Successful Firm Is an All-Inclusive Firm* (Law Practice Today, April 2010) <http://www.abanet.org/lpm/lpt/articles/fin04101.shtml>
- Kathleen Brady, *The Art of Delegating* (Law Practice Today, Oct 2006) <http://www.abanet.org/lpm/lpt/articles/mgt10064.shtml>
- Edward Poll, *Even the Lone Ranger Needed Tonto: Staff is Essential in Any Solo Practice* (Law Practice Today, Feb 2006) <http://www.abanet.org/lpm/lpt/articles/mtt02061.shtml>
- Donna S.M. Neff, *Fine-Tuning Human Resources: Top Tips for Frugal Law Firms* (Law Practice Magazine, Nov/Dec 2009) <http://www.abanet.org/lpm/magazine/articles/v35/is7/pg30.shtml>
- Jennifer Rice, *How to Manage Your First Legal Assistant*, (Law Practice Today, Sept 2008, <http://www.abanet.org/lpm/lpt/articles/mgt09084.shtml>)
- Jim Calloway, *Care and Feeding of the Law Office Staff* (GP/Solo, Jan/Feb 2007) <http://www.abanet.org/genpractice/magazine/2007/jan-feb/careandfeeding.html>
- Reid F. Trautz, *Pay Less in Taxes, Sleep Better at Night, and Enjoy Life a Little More* (GP/Solo, Jan/Feb 2007) <http://www.abanet.org/genpractice/magazine/2007/jan-feb/paylessintaxes.html>

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- Jim T. Priest, *The Lawyer as Employer: Why Do They Keep Changing the Rules?* (GP/Solo Jan/Feb 2007) <http://www.abanet.org/genpractice/magazine/2007/jan-feb/lawyerasemployer.html>
- Sheila M. Blackford, *Managing Your Relationships with Your Staff: Pointers for Getting It Right* (Law Practice Today, Feb 2010) <http://www.abanet.org/lpm/lpt/articles/ftr02101.shtml?ecamp=t-t432>
- Todd C. Scott, *Note to Staff: "That Computer Is Ours"—Implementing an Electronic Use Policy* (GP/Solo, Dec 2008) <http://www.abanet.org/genpractice/magazine/2008/dec/notetostaff.html>
- Robert A. Kraft, *A Blueprint for Marketing with Staff* (GP/Solo, July/Aug 2003) <http://www.abanet.org/genpractice/magazine/2003/jul-aug/kraft.html>
- Storm Evans, *Adult Learning Styles* (GP/Solo, June 2003) <http://www.abanet.org/genpractice/magazine/2003/jun/adultlearning.html>
- Wells H. Anderson, *Training Pitfalls and Pointers* (GP/Solo, June 2007) <http://www.abanet.org/genpractice/magazine/2007/jun/trainingpitfalls.html>
- Colleen Ford Kennedy, *Law Firm Wellness Programs Offer Help and Support* (Law Practice Today, Aug 2009) <http://www.abanet.org/lpm/lpt/articles/mgt08092.shtml>
- Wendy L. Werner, *Support Staff Success* (Law Practice Today, Sept 2008) <http://www.abanet.org/lpm/lpt/articles/mgt09082.shtml>
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## **Lawyers Mutual Lending Library Resources:**

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*The Personal Efficiency Program*, by Kerry Gleeson

*Trial Prep for Paralegals*, by Michael L. Coyne and Ursula Furi-Perry