

LICENSING TRAINING PLAN

Note for respondents: The information submitted through this form will be used to prepare a **Register of Training Supervisors**, pertinent details of which will be published online as a public document.

1. Full Name of Supervisor:
2. License No.:
3. Address of Legal Practice, Law Firm, or Institution:
4. Area(s) of Legal Practice:
5. The traineeship will be structured in such a way to provide trainees with practical experience **in the following core skills:**

1. Client Care and Management

- Participate in and conduct client interviews and taking client's instructions (including sensitive interviews e.g. of children, victims of trauma and disabilities)
- Observe and document client meetings in which remedies, options, advice, and instructions are discussed
- Conduct due diligence, including ensuring that all relevant information has been obtained and reviewed
- Participate in interviews with witnesses and experts
- Generate options and formulate strategy together with the supervisor
- Prepare witness statements and affidavits based on information collected in interviews, draft general correspondence, and written opinions
- Advise client under the direct supervision of the supervisor

2. Conducting Legal Research, Drafting and Legal Writing

- Review and summarize documentation (e.g. Transcripts; documents in client's file; contracts; corporate minute books)
- Identify applicable areas of law and legal issues involved; conduct due diligence

- Conduct research on substantive and procedural issues; conduct due diligence
- Draft court documents such as originating process, pleading, summons and court orders; contracts and agreements
- Use precedents
- Interpret and apply results of research
- Provide analysis and report results of research to the supervisor orally or in writing
- Prepare drafts of litigation documents (e.g. notices of motion; notices of application; draft orders; offers to settle, notices of appeal, affidavits, factums, minutes of settlement)
- Prepare drafts of solicitor-type documents (e.g. resolutions; powers of attorney, wills, agreements, letters of opinion, reporting letters)

3. Case and Transaction Management, including Monitoring Files & Negotiations

- Document a file (e.g. records of telephone calls; memos to file; client instructions)
- Use a system to track limitation period dates
- Prepare for negotiations (e.g. transactional; litigation, alternative dispute resolution/ADR); conduct due diligence
- Observe and participate in negotiations
- Review and discuss outcome of negotiations with the supervisor
- Conduct negotiations under the supervision of the supervisor (e.g. simple tribunal matter; minor civil litigation)
- Advise on settlements under the supervision of the supervisor
- Observe other forms of ADR (e.g. mediation, arbitration, conciliation)

4. Advocacy

- In relation to civil litigation, observe and support advocacy in different settings (e.g. interlocutory motions or applications; tribunal hearings; trials; pre-trial conferences; discoveries; applications; assessment of costs; examinations)

- Assist in preparation for a trial or appeal of a civil matter; conduct due diligence
- Assist in preparation for an interlocutory application
- Request, provide or participate in document disclosure (e.g. affidavits of documents; Prosecutor disclosure and plea negotiations)
- Attend court or tribunal, where permitted, to speak to routine administrative matters (e.g. unopposed adjournments; uncontested and consent motions; and set dates)
- In relation to criminal litigation, assist in preparation of client or witnesses for trial and in preparations for an appeal of a criminal matter; conduct due diligence
- In relation to corporate practice, assist in a corporate transaction such as sale of a business
- In relation to a conveyancing practice, assist in a conveyance transaction such as sale of house or other real estate property

5. Ethics and Professional Responsibility

- Identify and discuss ethical obligations and responsibilities of a lawyer
- Observe best practice in relation to retainers, documenting the scope of services and ensuring client understands the services being provided and the fees being charged
- Discuss lawyer's duty towards client confidentiality and steps to be implemented to ensure such confidentiality
- Discuss potential client conflict of interest issues and the use of a filing system that help detect and prevent conflict of interest
- Discuss steps to take when asked by a client to engage in an activity that would breach professional obligations
- Discuss Rules of Professional Conduct and provide examples on its application
- Instill in the Trainee an understanding of a lawyer's role in the Court, in the legal profession and in society at large and the importance to be ethical and professional in all dealings inside and outside the profession.

If, due to the nature of the law firm, legal practice or the legal institution of training, one or more specific practical skill cannot be provided in the regular work of the supervisor, then the supervisor agrees to find alternative ways to ensure that the core skills are completed by the trainee, such as: simulations of real court cases; conducting legal research using case studies or research on case law and statutes; workshops modeled to teach due diligence, client care management and transaction management, mock trials to develop advocacy skills.

Name of Supervisor:

Date:

Signature: