

Legal support staff conference 2010

24 September
Law Society House, Brisbane

inspiration

practical advice

career progress

networking

essentials in law

Legal support staff conference 2010

Friday 24 September 2010

	<p>8:30am – 8:50am Registration</p>	
<p>8:50am – 9:30am</p>	<p>8:50am Welcome from the Chair Chair: Dianne Firman, Human Resources Manager, Queensland Law Society</p> <p>9:00am – 9:30am MORNING PLENARY Setting smart goals for your career progress Working in a legal practice requires adherence to certain standards of ethics and integrity, effective time management, the skills to deal with a variety of challenging situations and people, while also maintaining work-life balance. In a demanding environment, it is important to take the time to set realistic goals for performance on the job and career development. In fact, setting goals at work and incorporating them into short, mid and long-term career goals can be extremely rewarding. Drawing from her significant experience in the legal sector, Mary Hockaday will discuss:</p> <ul style="list-style-type: none"> • how to set specific, measurable, achievable, realistic and time-bound goals on the job • incorporating these goals into your overall career goals • practical tips and guidance for excelling as a support staff member <p>Speaker: Mary Hockaday, Human Resources and Practice Manager, DLA Phillips Fox</p>	
	<p>9:30am – 10:30am</p> <p>Practical advice for preparing legal documents The preparation of court documents is not always as straight forward as it seems. It requires a firm understanding of the court system and how it operates, and knowledge of certain legal requirements for preparing and filing court documents. Presented by a solicitor and a barrister, this session will focus on:</p> <ul style="list-style-type: none"> • an overview of the <i>Uniform Civil Procedure Rules</i> forms • when to use certain forms and why • common forms used in commercial litigation matters – statements of claim, affidavit of service and copies of judgements • the importance of timeframes for filing certain documents and deadlines <p>Speakers: Derek Cronin, Partner, Cronin Litigation Lawyers, David Topp, Barrister, Queensland Bar</p>	
<p>10:30am – 10:50am Morning tea</p>		
<p>10:50am – 12:30pm</p>	<p>STREAM 1A – ESSENTIALS IN PROPERTY LAW</p> <p>10:50am – 11:35am <i>The Property Agents and Motor Dealers Act (PAMDA) and the Conveyancing Protocol</i> PAMDA – What support staff need to know It is vital for support staff in a conveyancing practice to understand the importance of the proposed changes under the Property Agents and Motor Dealers and Other Legislation Amendment Bill 2010, and how they are set to affect current conveyancing practices. This session will discuss:</p> <ul style="list-style-type: none"> • the <i>Property Agents and Motor Dealers Act (PAMDA)</i> • the importance of compliance • the ramifications of non-compliance • warning statements and what they mean • electronic copies of the contract and the related requirements 	<p>STREAM 1B – ESSENTIALS IN PERSONAL INJURIES LAW</p> <p>10:50am – 11:20am <i>The relevant forms and timelines in personal injury matters</i> Personal injuries cases embody matters under three Acts, including the <i>Personal Injuries Proceedings Act 2002</i>; <i>Workers' Compensation and Rehabilitation Act 2003</i> and the <i>Civil Liability Act 2003</i>. Specific to the role of support staff in personal injuries matters, this session will explore:</p> <ul style="list-style-type: none"> • a brief outline of the type of matters and the relevant forms under each Act • the limitation periods and how they become important to support staff • the expiry of the limitation period and what this means • the importance of effective bring-up systems in personal injury matters <p>Speaker: Gillian McKnight, Solicitor, Trilby Misso Lawyers</p>

STREAM 1A – ESSENTIALS IN PROPERTY LAW (cont.)**Conveyancing protocol for legal support staff**

This session will consider:

- what is the Queensland Conveyancing Protocol and the Protocol checklist?
- what are the tools available to assist with Protocol compliance?
 - an update of conveyancing first letters to parties within a conveyancing matter
 - PAMDA checklists, including the role of real estate agents
 - the vital importance of using file notes
- the outcome of the failure to comply with the Conveyancing Protocol

Speaker: Mitchell Beck, Senior Associate, Flower and Hart Lawyers and Accredited Specialist – Property law (QLD)

11:35am – 12:15pm

Practical advice for preparing property-related documents

Knowing how to prepare transfer documents correctly is essential to the skills of support staff in the employment of a firm specialising in conveyancing matters. Incorrectly prepared documents can cause unnecessary delay and additional costs to clients. This session canvasses:

- identification of the type of transactions and relevant documents including:
 - commercial and residential property transactions
 - off the plan contracts
 - Community Title Schemes
 - Foreign Investment Review Board approval
- how to successfully complete transfer documents
 - an overview of common terms, including tenants in common, joint tenancy and trusts, partnerships, super funds and companies as parties
- the common mistakes that you can avoid
- examples of the Department of Natural Resources forms
- the lodgement process
- the process to deal with requisitions

12:15pm – 12:30pm

Office of State Revenue Audit – what you need to know

Every year, the Office of State Revenue (OSR) runs a state-wide compliance program to ensure that all clients meet their legal obligations as self-assessors and/or taxpayers. In this session, the OSR will discuss the most common mistakes made and how you can prevent them. The session will also cover the following:

- what are your rights?
- what are your obligations?
- what does the OSR expect?
- reassessments and refunds
- penalties
- objections and appeals

Speaker: Elias Serrano, Senior Client Engagement Officer, Office of State Revenue

Chair: Phil Pennington, Partner, Maunsell Pennington Solicitors

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**STREAM 1B – ESSENTIALS IN PERSONAL INJURIES LAW** (cont.)

11:20am – 12:00pm

Statements of loss and damage (SLD)

SLD is an important document in personal injury matters. The preparation of a detailed SLD and the attachment of supporting documents to the claim, are vital to the success of a case. Designed for legal support staff assigned with the important task of managing the collection and filing of documents, this session outlines:

- what is a statement of loss and damage
- what are supporting documents in a statement of loss and damage
- the processes to follow when filing supporting documents

Speaker: Tania Bola, Partner, MurphySchmidt Solicitors

12:00pm – 12:30pm

Personal injury matters and client agreements

The fee structure in personal injury matters can be complicated for support staff employed in this area of law. Legal support staff who prepare client agreements at the direction of supervising partners should have a sound understanding of the fee structure and cost rules applicable when preparing client agreements.

This session will address the cost rules specific to personal injury matters, along with:

- an overview of a typical personal injury client agreement
- what costs a firm has to disclose at the commencement of a matter
- the stage at which these costs become payable
- examples of cost disputes in personal injury matters

Speaker: Matthew Holmes, Partner, MurphySchmidt Solicitors and Accredited Specialist – Personal injuries law (QLD)

Chair: Cameron Seymour, Partner, Mullins Lawyers

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12:30pm – 1:30pm Lunch

STREAM 2A – ESSENTIALS IN WILLS AND ESTATE PRACTICE

1:30pm – 2:00pm

Stepping through the Will preparation process

Legal support staff are the first point of contact for potential clients who are seeking to engage a firm to make their Wills. The key issues in this session include:

- the confidential nature of a Will preparation process
- the formal requirements of a Will and the role of the support staff member, including filing evidence of capacity, and maintaining file notes
- tips for dealing with clients in Wills and estates matters
- the significance of witnessing a Will

Speaker: Craig Spink, Senior Associate, McInnes Wilson Lawyers

2:00pm – 2:30pm

A brief outline of the estate administration process

Estate administration takes place when a deceased person leaves behind his or her estate with or without a Will. While the estate administration falls within the parameters of a solicitor's job, legal support staff providing support in this area of practice must have an understanding of the forms relevant to estate matters. This session will explore:

- the difference between letters of administration and probate
- the relevant forms in probate matters

Speakers: Frances Fredriksen, Senior Associate, McCullough Robertson Lawyers and Accredited Specialist – Succession Law (Qld) and **Kimberley Davis**, Solicitor, McCullough Robertson Lawyers

Chair: Betty Leung, Solicitor and Accredited Specialist – Succession Law (Qld)

STREAM 2B – FAMILY LAW

Family law matters – the process, identifying forms and jurisdiction

Specific to the role of support staff members in the family law jurisdiction, this workshop is designed to equip support staff with an understanding of the A-Z process of family law matters including:

- the steps from the initial consultation to the final hearing
- identifying the relevant forms – when to use which forms
- identifying the difference between the jurisdiction of the Federal Magistrates Court and the Family Court
- tips and traps for dealing with clients in family law matters

Speaker: Pippa Colman, Principal, Pippa Colman & Associates, and Accredited Specialist – Family Law (Qld)

Chair: Shauna Foley, Senior Associate, HopgoodGanim Lawyers

1:30pm – 2:30pm

2:30pm – 2:40pm Session break

The importance of ethics for support staff

There are certain professional duties and standards expected of lawyers and strict penalties can be incurred in the case of a breach. It is imperative for support staff to understand what role they play within a law firm in the discharging of their duties. Two important common issues are questions of disclosure and legal advice. When communicating with clients, legal support staff must not cross the boundary of their roles to provide advice that can be construed as legal advice. This session will focus on practical examples and discuss the following:

- the importance of disclosure
- the parameters of legal support staff communication – what is and isn't legal advice
- tips for the prevention of a breach

Speaker: Stafford Shepherd, Ethics Guidance Solicitor, Queensland Law Society

Chair: Gill Richardson, Manager, Member Relations, Queensland Law Society

2:40pm – 3:10pm

3:10pm – 3:30pm Afternoon tea

Trust accounting for support staff

Trust accounting is an essential part of the business of a law firm. Legal support staff who handle cash books, receipts, cheques and attend to ledgers and reconciling trust accounts, should know the rules governing the handling of trust accounts. Designed to deliver the essentials in trust accounting for legal support staff, this session will be presented plainly with practical examples of:

- how to manage trust accounts and early identification of potential problems
- consequences of mishandling trust accounts
- the rules set out in the Legal Profession Act 2007 and their application to legal support staff
- assistance and resources provided by the audit section of the Queensland Law Society

Speaker: Bill Hourigan, Manager, Audit, Queensland Law Society

Chair: Gill Richardson, Manager, Member Relations, Queensland Law Society

3:30pm – 4:30pm

Legal support staff conference 2010

4:30pm – 5:00pm

4:30pm – 5:00pm CLOSING PLENARY

The importance of confidentiality

In your role as a legal support staff member, you are likely to be privy to confidential client and case information on a daily basis. There is strict responsibility placed upon support staff to maintain such information as confidential at all times, in and outside their place of employment. For this purpose, it is vital to know what information construes confidential information. Presented in an interactive format, the key issues for address in this session include:

- confidentiality
 - why is confidentiality so important in a law firm?
 - what are the rules of confidentiality applicable to law firms?
 - why is confidentiality and your role as a member of a firm's legal support staff important?
- what can you do to incorporate the duty of confidentiality in your daily tasks?
 - asking the right questions without divulging confidential information
- client identification and how to ensure it is the client you are actually dealing with

Speakers: **Trent Waller**, Partner, Carne Reidy Herd and Accredited Specialist – Family law (Qld) and **Genevieve Dee**, Senior Associate, Carne Reidy Herd and Accredited Specialist – Family law (Qld)

Chair: **Tracy Skellern-Smith**, Legal Risk Solicitor, Lexon Insurance

5:00pm Close of conference

Program information

The venue

The conference will be held at the Queensland Law Society Auditorium, level 2, Law Society House, 179 Ann Street, Brisbane.

Meals

Morning tea, lunch and afternoon tea will be held in the Auditorium, and delegate registration fees are inclusive of these, when attending in person.

Public car parking

Secure Parking

Phone: 07 3221 9892.

Location: 192 Ann Street (opposite Law Society House), Brisbane.

King George Square Car Park

Phone: 07 3403 8888.

Location: entrance via Roma Street or Adelaide Street, Brisbane.

Note: Please contact car parking station for further information on prices. Parking is subject to availability.

Registration entitlements

Full-day delegate (attending in person)

- attendance at all conference sessions
- papers for the conference will be emailed 72 hours prior.
- morning tea, lunch and afternoon tea

Full-day delegate (attending via videoconference)

- attendance at all conference sessions
- papers for the conference will be emailed 72 hours prior.

A green initiative for Queensland Law Society – electronic distribution of speaker presentations

The Queensland Law Society is committed to reducing its carbon footprint and impact on the environment. Papers and presentations (where supplied by the presenter) will be distributed to delegates electronically 72 hours prior to the conference date. Papers and presentations (where supplied by the presenter) will also be provided to delegates on the day of the conference on a USB stick.

Name badges

Your name badge is your passport to all conference sessions, morning tea, lunch and afternoon tea. Please ensure your badge is visible at all times.

Delegates with special requirements

Please indicate any special dietary or physical requirements on your registration form.

Cancellation policy and transfers

Please refer to the Queensland Law Society events policy at qls.com.au for terms and conditions on cancellations and transfers.

Close of conference registration

Earlybird registration (with accompanying payment) must be received on or before 3 September 2010.
Standard registration (with accompanying payment) must be received on or before 22 September 2010.
Videoconference registration (with accompanying payment) must be received on or before 21 September 2010.

Taxis

Black & White can be booked on 13 10 08. Yellow Cabs can be booked on 13 19 24.

Public transport

Buses and trains run frequently from all areas to Brisbane CBD. The main bus depot is located under the Myer Centre. All trains stop at Central station, which is located approximately one minute from Queensland Law Society. For further information please refer to the Translink website at translink.com.au or by phone on 13 12 30.

Disclaimer

Queensland Law Society reserves the right to substitute sessions and/or speakers where necessary. All details are correct as at 7 May 2010.

Privacy:

Privacy: The Queensland Law Society (the Society) respects your privacy and is committed to the Information Privacy Principles contained in the *Information Privacy Act 2009* (Qld). The Society collects personal information about you to provide services to you, to improve the quality of those services, and to provide you with information about other services we offer. For these purposes, we may disclose your personal information to organisations to whom we outsource functions such as market research and to our service entities. The Society also uses this information to conduct research for the development of educational and professional programs.

At any event held by the Society, your image may be photographed or filmed at any time throughout the event. We may use, publish or reproduce your image or recording of you in any form of published communication material to promote the Society's services and to report on its events through its publications and resource material such as our Annual Report and Proctor. Your consent to the use of your image in full or part for any Society related purpose is taken to be given by attending this event.

Your image and other personal information collected by the Society will be securely stored and only authorised officers will have access to this information. The Society takes reasonable steps to ensure your personal information is not exposed to misuse, loss or unauthorised access.

Should you not wish to have your image photographed or filmed, please contact the Society at privacy@qls.com.au to advise that you do not wish to be photographed or filmed.

If, at any time, you would prefer that the Society did not use or disclose your personal information, including your image, please contact the Society at privacy@qls.com.au. If your details change or you wish to access the information the Society holds about you, please contact the Society on + 61 7 3842 5888.

Registration Form

Legal support staff conference 2010 24 September 2010, Law Society House, Brisbane

Mail Queensland Law Society, GPO Box 1785, Brisbane Qld 4001

Fax 07 3221 2279 (credit card payments only)

Phone 07 3842 5907 (enquiries only)

Delegate information

Queensland Law Society member number	
First name	
Last name	
Name tag	
Organisation	
Postal address	
City/Town	Postcode
Tel (bh)	Fax
Email	
Special dietary requirements	

Member registration

FULL DAY conference registration (all prices inclusive GST)			
Earlybird online	by 3 September	\$330	ONLINE ONLY at qls.com.au
Earlybird fax/post	by 3 September	\$352	<input type="checkbox"/>
Standard fax/post	by 22 September (attend in Brisbane) or by 21 September (attend videoconference)	\$374	<input type="checkbox"/>

Non-member registration

FULL DAY conference registration (all prices inclusive GST)			
Standard fax/post only	by 22 September	\$440	<input type="checkbox"/>

Please note: Earlybird registration closes 3 September 2010 and is only available to Queensland Law Society members. There is no earlybird rate for non-members. **Standard registration closes 22 September 2010.** For videoconference – registration and payment must be received on or before **21 September 2010.**

Concurrent sessions Very important – (please tick the stream you wish to attend)

10:50am – 11.35am	
<input type="checkbox"/>	Stream 1A – Essentials in Property law
<input type="checkbox"/>	Stream 1B – Essentials in Personal injuries law
1:30pm – 2:30pm	
<input type="checkbox"/>	Stream 2A – Essentials in wills and estate practice
<input type="checkbox"/>	Stream 2B – Family law

Venue

I will attend in person at Law Society House

I will attend by videoconference (please tick preferred location)

<input type="checkbox"/>	Atherton (<i>Danielle D Hogens, 40 Mobil St, Atherton</i>)
<input type="checkbox"/>	Beenleigh (<i>RiverLegal, 3A John Street, Beenleigh</i>)
<input type="checkbox"/>	Bundaberg (<i>Payne Butler Lang Solicitors, Qunaba House, 2 Targo House Bundaberg</i>)
<input type="checkbox"/>	Cairns (<i>Maurice Blackburn Cashman Lawyers, 209 Buchan Street, Cairns</i>)
<input type="checkbox"/>	Cannonvale (<i>Macrossan & Amiet, Suite 4, Whitsunday Business Centre, 230 Shute Harbour Rd, Cannonvale</i>)
<input type="checkbox"/>	Dalby (<i>Shannon Donaldson Province Lawyers, 33a Archibald Street, Dalby</i>)
<input type="checkbox"/>	Gladstone (<i>Kenny & Partners, 16 Yarroon Street, Gladstone</i>)
<input type="checkbox"/>	Gold Coast (<i>Reaburn Solicitors, West Burleigh Professional Centre, 39 Tallebudgera Creek Road, West Burleigh</i>)
<input type="checkbox"/>	Gympie (<i>Power & Cartwright, 239 Mary Street, Gympie</i>)
<input type="checkbox"/>	Hervey Bay (<i>Bell Dixon Butler, 12 Bideford Street, Torquay, Hervey Bay</i>)
<input type="checkbox"/>	Ipswich (<i>Dale & Fallu, 142 Brisbane Street, Ipswich</i>)
<input type="checkbox"/>	Mackay (<i>Wallace & Wallace Solicitors, Russell House, 60 Sydney Street, Mackay</i>)
<input type="checkbox"/>	Mount Isa (<i>L A Evans Solicitor, 71 Camooweal Street, Mt Isa</i>)
<input type="checkbox"/>	Redcliffe (<i>Cooke & Hutchinson, 19 Redcliffe Parade, Redcliffe</i>)
<input type="checkbox"/>	Rockhampton (<i>Grant & Simpson Solicitors & Notary, 226 Quay Street, Rockhampton</i>)
<input type="checkbox"/>	Sunshine Coast (<i>Ferguson Cannon Lawyers, Level 1, 17 Southern Drive, Maroochydore</i>)
<input type="checkbox"/>	Surfers Paradise (<i>Hartnett Lawyers, 60 Appel Street, Surfers Paradise</i>)
<input type="checkbox"/>	Toowoomba (<i>Crawford Laherty & O'Sullivan Solicitors, 1 Clifford Street, Toowoomba</i>)
<input type="checkbox"/>	Townsville (<i>Giudes & Elliott Solicitors, 60-62 Denham Street, Townsville</i>)

Payment

Please note that full payment must accompany your registration

Course code:	100924
Total payment (incl GST)	<input type="text"/>
<input type="checkbox"/>	My cheque payable to Queensland Law Society Inc is enclosed
<input type="checkbox"/>	Please debit my credit card (diners club is not accepted)
<input type="checkbox"/>	<input type="checkbox"/> Visa <input type="checkbox"/> Mastercard <input type="checkbox"/> QLS Amex <input type="checkbox"/> Amex
Card #	<input type="text"/>
Cardholder name	<input type="text"/>
Expiry date /	Amount \$
Cardholder signature	<input type="text"/>

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