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Effective Legal Support: Matrimonial Property

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Matrimonial Property for Legal Support Staff: Top Ten Tips

Effective Legal Support: Matrimonial Property

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MATRIMONIAL PROPERTY FOR LEGAL SUPPORT STAFF: TOP 10 TIPS

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TIP #1 - REMEMBER THAT IT IS YOUR JOB TO ASSIST YOUR LAWYER AND MAKE THEIR JOB EASIER

- (a) Anticipate your lawyer's needs - think about what your lawyer will need before they have to ask for it and get it ready for them.
 - (i) This could mean reading notes/memos to the file or reviewing the checklist they may have provided to the client when the file was opened.
 - (ii) If your lawyer has provided the client with a standard list of documents required, ensure that you review that list.
 - (iii) If there has been a Notice to Disclose filed on your client, ensure that you note the Court Date and put it into your lawyer's calendar. If there has been no application for disclosure filed, ask your lawyer when they would like the documents by.
- (b) Organize the financial disclosure and property documents for an easy review for your lawyer, which will enable them to review the documentation easily and inevitably save time and money for your client.
 - (i) As disclosure documents come in, scan them and organize, compile and save them digitally. If they have been sent electronically, make sure that you print all pages. File the client's physical disclosure in a binder with TABS so that it follows the number scheme from a Notice to Disclose/Application (i.e. Income Tax Returns go under TAB 1, Notices of Assessments under TAB 2, etc.). Numbering digital files so that they correspond with the physical documents will help immensely. For example:
 - "1. 2015 T1 General Income Tax and Benefit Return" or
 - "11. TD Unlimited Chequing 60X2X7X Account. Jun. 1, 2016 - Nov. 16, 2016".
- (c) Set up the disclosure for your files in a consistent manner for all clients so that when you or someone else picks up a file it meets expectations and documents are easy to find. Remember that every lawyer is different, and likes things set up differently – adjust accordingly.