

January 17, 2022

Best Practices in Opening, Managing and Closing Client Files for Paralegals

CHAIR: **Carrie Bertrand,**
Carrie Bertrand Paralegal Services

March 23, 2022
12:00 p.m. to 1:30 p.m.
Total CPD Hours = 1 h + 30 m Professionalism ^P

Law Society of Ontario

SKU CLE22-00308

Agenda

- | | |
|--------------------------------|---|
| 12:00 p.m. – 12:02 p.m. | Welcome

<i>Carrie Bertrand, Carrie Bertrand Paralegal Services</i> |
| 12:02 p.m. – 12:25 p.m. | The Importance of a File Opening Process

<i>Carrie Bertrand, Carrie Bertrand Paralegal Services</i> |
| 12:25 p.m. – 12:55 p.m. | Managing the File

<i>George Brown, George Brown Professional Corporation</i> |
| 12:55 p.m. – 1:05 p.m. | Question and Answer Session |

1:05 p.m. – 1:25 p.m.

Closing the File

Miranda Medve, *Carrie Bertrand Paralegal Services*

1:25 p.m. – 1:30 p.m.

Question and Answer Session

1:30 p.m.

Program Ends