

June 14, 2023

# The Retainer Agreement Explained

CHAIR: **Paula Callaghan**, *Callaghan Paralegal*

**June 19, 2023**

**12:00 p.m. to 2:00 p.m.**

**Total CPD Hours = 1 h Substantive + 1 h Professionalism P**

**Law Society of Ontario**

**SKU CLE23-00604**

## Agenda

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|--------------------------------|---|
| <b>12:00 p.m. – 12:05 p.m.</b> | <b>Welcome</b><br><br><i>Paula Callaghan, Callaghan Paralegal</i>   |
| <b>12:05 p.m. – 12:20 p.m.</b> | <b>Conflict Checks and Conducting a Successful Client Intake while Managing Client Expectations (5 m <span style="border: 1px solid black; border-radius: 50%; padding: 0 2px;">P</span>)</b><br><br><i>Christina De Palma, De Palma &amp; Associates Legal Services PC</i> |
| <b>12:20 p.m. – 12:40 p.m.</b> | <b>Best Practices for Retainer Agreements and Confirming the Essential Details with your Client (5 m <span style="border: 1px solid black; border-radius: 50%; padding: 0 2px;">P</span>)</b><br><br><i>Amri Murray, AJ Murray Legal Services P.C.</i>                      |
| <b>12:40 p.m. – 12:50 p.m.</b> | <b>Question and Answer Session</b>  |

**12:50 p.m. – 1:00 p.m.**

**Break**

**1:00 p.m. – 1:20 p.m.**

**Important Tips for Preparing Fixed Fee and Contingency Fee Retainer Agreements (15 m )**

*Julie Rose, Rose Legal Services*

**1:20 p.m. – 1:40 p.m.**

**Important Tips for Preparing Limited Scope and Joint Retainer Agreements (15 m )**

*Brenell Dean, Dean's Paralegal Services & Lawyers*

**1:40 p.m. – 2:00 p.m.**

**How to Effectively Prepare Your Retainer Agreement While Considering the *Paralegal Rules of Conduct* (20 m )**

*Kristina MacDonald, Litigation Services, Law Society of Ontario*

**2:00 p.m.**

**Program Ends**