

## Training Checklist for Trainee Solicitors

### I. Aim

To enhance consistency in the process of training, the Law Society has prepared a checklist on the basic type of practical training that a trainee solicitor is expected to undergo prior to qualification.

The checklist is aimed at providing general guidance on the basic training and assisting principals and trainees in devising their own training programme. Principals can amend and adapt it to meet the training needs of their own practice.

In handling the tasks set out in specific practice areas, trainees should be closely supervised by experienced practitioners.

### II. Requirements in trainee solicitor contract

In the standard form of a Hong Kong trainee solicitor contract (Clause 5(1)), a principal is required to provide his trainee solicitor with the opportunity to learn:

- (a) the principles of professional conduct;
- (b) the basic skills of
  - (i) communication
  - (ii) practice support
  - (iii) legal research
  - (iv) drafting
  - (v) interviewing
  - (vi) negotiation
  - (vii) advocacy;
- (c) at least 3 of the following legal practice areas:
  - (i) banking
  - (ii) civil litigation
  - (iii) commercial
  - (iv) company
  - (v) criminal litigation
  - (vi) family
  - (vii) insolvency
  - (viii) intellectual property
  - (ix) property
  - (x) trusts, wills and probate

### III Training Checklist for Trainee Solicitors

To make the training effective, trainee solicitors should be given regular guidance and feedback on their performance.

Where feedback on performance is expected to be given by the principal, there will be two boxes against the item, each marked with “T” and “P” representing training given to trainee and feedback given by principal respectively.

Trainees can tick in the boxes where appropriate.

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
1.	<b>Induction</b>	<p>(a) <b>Briefing on office procedures</b></p> <p><input type="checkbox"/> • Office hours</p> <p><input type="checkbox"/> • Salary payments</p> <p><input type="checkbox"/> • Leave application</p> <p><input type="checkbox"/> • Liaison with other departments</p> <p><input type="checkbox"/> • Secretarial support</p>	<p>Gain an understanding of</p> <p>(i) the work environment</p> <p>(ii) the firm's background</p> <p>(iii) the people to work with</p> <p>(iv) the office procedures to follow</p> <p>(v) the requirements to fulfill as a trainee</p>	

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
1.	Induction (cont'd)	<p><b>(b) Briefing on office and IT systems</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> • Filing system</li> <li><input type="checkbox"/> • Archiving system</li> <li><input type="checkbox"/> • Library</li> <li><input type="checkbox"/> • Research facilities</li> <li><input type="checkbox"/> • Computer software in use</li> <li><input type="checkbox"/> • Use of Internet</li> <li><input type="checkbox"/> • Use of E-mail</li> </ul> <p><b>(c) Briefing on structure of training</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> • Registration of trainee solicitor contract</li> <li><input type="checkbox"/> • Seat rotation</li> <li><input type="checkbox"/> • Requirement on the completion and maintenance of a training record for the duration of the contract</li> <li><input type="checkbox"/> • Continuing professional development requirement for trainees</li> <li><input type="checkbox"/> • Student membership of the Law Society</li> </ul>		

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
2.	Professional ethics	<p>Experience in applying major ethical principles in real cases:</p> <p><b>(a) Fiduciary duty</b></p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Act in client’s best interests with honesty, openness and fairness</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Handle conflict check (between solicitor and client and between clients)</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Identify any potential or actual conflict</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Take appropriate action to deal with any actual conflict or to avoid any potential conflict arising in the future</p> <p><b>(b) Confidentiality</b></p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Recognise and comply with the duty of confidentiality owed to clients</p> <p><b>(c) Professional undertakings</b></p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Draft professional undertakings taking into account the effect and the responsibilities embodied in such undertakings</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Follow up on the performance of the professional undertakings</p>	<p>Ability to</p> <p>(i) recognise and resolve ethical dilemmas</p> <p>(ii) identify and discharge duties and obligations as a solicitor in accordance with rules of professional conduct applicable to Hong Kong solicitors</p>	

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
2.	Professional ethics (cont'd)	<p>(d) Professional fees</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Draft written advice on cost estimates / availability of legal aid</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Draft bills of costs (interim and final)</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Draft written records of agreed fees</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Follow up on the settlement of the bills / agreed fees</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Understand the office procedures on issue of receipts and payment of fees into office / client accounts / third parties</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Understand the prohibition against profit sharing with unqualified persons</p>		

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
3.	<b>Communication skills</b>	<p><b>T</b> <b>P</b> (a) Draft letters to clients, internal notes and memos</p> <p><b>T</b> <b>P</b> (b) Report orally to clients and others by telephone or at meetings</p>	<p>Ability to</p> <p>(i) identify with respect to a proposed communication:</p> <ul style="list-style-type: none"> <li>- the purpose; and</li> <li>- the most appropriate and effective way of making it; and</li> </ul> <p>(ii) present thoughts, advice and submission orally and in writing in a logical, clear and succinct manner, having regard to the circumstances and the recipient to whom the communication is directed.</p>	

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
4.	Practice support skills	<p data-bbox="452 272 1211 379"> <span style="border: 1px solid black; padding: 2px;">T</span> <span style="border: 1px solid black; padding: 2px;">P</span> (a) Run small transactions under close supervision and gain experience in case management         </p> <p data-bbox="452 464 1263 531"> <span style="border: 1px solid black; padding: 2px;">T</span> <span style="border: 1px solid black; padding: 2px;">P</span> (b) Work on larger transactions as a member of a team and gain experience in team work         </p>	<p data-bbox="1299 240 1870 1489">           Ability to            (i) manage personal workload efficiently;            (ii) work effectively as a team member;            (iii) use information technology competently to improve work efficiency;            (iv) keep appropriate file records in an orderly manner and render timely bills;            (v) keep clients fully informed of all developments in their matter in a professional manner;            (vi) recognise any signs of client dissatisfaction and act appropriately;            (vii) conduct each matter in a way that minimises any risk to client and law firm;            (viii) identify clients' problems and objectives and generate possible solutions for evaluation based on merits and risks;            (ix) plan and review progress of case / transaction and bring matters to a timely and client-satisfactory conclusion.         </p>	

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
5.	<b>Legal research skills</b>	<p><input type="checkbox"/> T <input type="checkbox"/> P (a) Research specific legal issues using traditional and computerised research tools and sources</p> <p><input type="checkbox"/> T <input type="checkbox"/> P (b) Record the results of research and apply them to the facts in question</p> <p><input type="checkbox"/> T <input type="checkbox"/> P (c) Record orally and in writing the results and application to the supervising solicitor</p>	<p>Ability to</p> <p>(i) identify and investigate factual and legal issues;</p> <p>(ii) select appropriate resources to help find solutions;</p> <p>(iii) record, analyse, apply and communicate research results.</p>	
6.	<b>Drafting skills</b>	<p><input type="checkbox"/> T <input type="checkbox"/> P (a) Draft legal documents (such as leases, agreements and pleadings) both with and without the use of precedents</p> <p><input type="checkbox"/> T <input type="checkbox"/> P (b) Understand the proper use of precedents</p> <p><input type="checkbox"/> T <input type="checkbox"/> P (c) Explain legal documents drafted by others</p> <p><input type="checkbox"/> T <input type="checkbox"/> P (d) Draft general correspondence, advice letters, instructions to Counsel</p>	<p>Ability to draft documents which</p> <p>(i) are factually and legally accurate;</p> <p>(ii) meet the intended purpose;</p> <p>(iii) are well organised, clear and precise;</p> <p>(iv) form a consistent and coherent whole.</p>	



	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
7.	Interviewing skills	<p><b>T</b> <b>P</b> (a) Prepare for an interview</p> <p><b>T</b> <b>P</b> (b) Attend meetings with clients and witnesses with the supervising solicitor and take notes of meetings</p> <p><b>T</b> <b>P</b> (c) Conduct interviews with clients and witnesses under the close supervision of solicitor</p> <p><b>T</b> <b>P</b> (d) Take any follow up action after the interview</p>	<p>Ability to</p> <p>(i) identify the client's goals and priorities and use appropriate interviewing techniques to take accurate instructions;</p> <p>(ii) explain the legal situation clearly and accurately;</p> <p>(iii) ensure that there is a mutual understanding with clients on retainers and fees;</p> <p>(iv) accurately record the interview, confirming instructions and action that needs to be undertaken following the interview;</p> <p>(v) help the client decide the most appropriate course of action taking into account his goals and priorities.</p>	

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
8.	Negotiation skills	<p><b>T</b> <b>P</b> (a) Prepare for negotiation on a matter on behalf of a client (identify the issues, assess the position and plan the strategy)</p> <p><b>T</b> <b>P</b> (b) Observe negotiations conducted by experienced solicitors</p> <p><b>T</b> <b>P</b> (c) Conduct negotiations under close supervision</p> <p><b>T</b> <b>P</b> (d) Takes notes of the negotiation</p> <p><b>T</b> <b>P</b> (e) Take any follow up action including drafting a settlement agreement</p>	<p>Ability to</p> <p>(i) negotiate effectively engaging appropriate techniques and strategies a matter on behalf of a client, including a settlement and / or representing or co-representing a client at a mediation;</p> <p>(ii) identify possible options to resolve dispute and explain to the client the benefits and disadvantages of each option with respect to the matter.</p>	
9.	Advocacy	<p><b>T</b> <b>P</b> (a) Understand the rights of audience for trainee solicitors and solicitors</p> <p><b>T</b> <b>P</b> (b) Prepare for court / tribunal appearances</p> <p><b>T</b> <b>P</b> (c) Exercise the rights of audience available to trainee solicitors</p>	<p>Ability to</p> <p>(i) advocate a case on behalf of a client effectively both orally and in writing;</p> <p>(ii) exercise with confidence the rights of audience available to solicitors.</p>	

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
10.	Practice areas	<input type="checkbox"/> (a) Banking <input type="checkbox"/> (b) Civil litigation <input type="checkbox"/> (c) Commercial <input type="checkbox"/> (d) Company <input type="checkbox"/> (e) Criminal litigation <input type="checkbox"/> (f) Family <input type="checkbox"/> (g) Insolvency <input type="checkbox"/> (h) Intellectual property <input type="checkbox"/> (i) Property <input type="checkbox"/> (j) Trusts, wills and probate	Ability to (i) handle reasonably complex client matters relating to at least 3 practice areas with confidence (ii) display a good working knowledge and understanding of the legal and practice issues that commonly arise in at least 3 practice areas (iii) apply the knowledge and understanding correctly and in manner appropriate to everyday legal practice	

	Area	Briefing / Training / Practical Experience	Duration (with dates)
10.	Practice area - Banking	<p>(a) Banking</p> <ul style="list-style-type: none"> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Draft simple loan agreements, guarantees, security documents, related board minutes, director's certificates and other ancillary documents</li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Assist in loan transactions, including drafting, reviewing and commenting on related documents, liaising and coordinating with client, foreign Counsel and opposing Counsel, collating and organising transaction and conditions precedent documents, following up on conditions subsequent requirements</li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Assist in Debt Capital Markets transactions, including drafting, reviewing and commenting on offering materials, placement / subscription agreements and ancillary documents</li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Assist in preparing debt sell down and transfer documentation including assignments and sub-participations</li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Assist in reviewing derivatives documentation (including swap documentation) and be familiar with market standard documentation (ISDA)</li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Draft / review legal opinions and liaise with foreign Counsel in relation to legal opinions on foreign law</li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Draft / review and collate conditions precedent documents and liaise with various parties throughout the process of fulfilling conditions precedent requirements</li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Draft / review and comment on commitment letters, fee letters, term sheets and engagement letters</li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Be familiar with loan market standard form documentation (e.g. APLMA and LMA standard form documents) from both lender and borrower perspective</li> </ul> </div> </li> </ul>	

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10.	Practice area – Banking (cont'd)	<table border="0"> <tr> <td data-bbox="443 245 506 304">T</td> <td data-bbox="521 245 584 304">P</td> <td data-bbox="703 239 1850 304"> <ul style="list-style-type: none"> <li>• Arrange for relevant company, court and insolvency searches against companies and review search results</li> </ul> </td> </tr> <tr> <td data-bbox="443 347 506 406">T</td> <td data-bbox="521 347 584 406">P</td> <td data-bbox="703 347 1375 384"> <ul style="list-style-type: none"> <li>• Review constitutional documents of companies</li> </ul> </td> </tr> <tr> <td data-bbox="443 418 506 477">T</td> <td data-bbox="521 418 584 477">P</td> <td data-bbox="703 424 1335 461"> <ul style="list-style-type: none"> <li>• Prepare Particulars of Charges and Releases</li> </ul> </td> </tr> <tr> <td data-bbox="443 494 506 553">T</td> <td data-bbox="521 494 584 553">P</td> <td data-bbox="703 501 1731 537"> <ul style="list-style-type: none"> <li>• Arrange for filing and registration of documents at the Companies Registry</li> </ul> </td> </tr> <tr> <td data-bbox="443 571 506 630">T</td> <td data-bbox="521 571 584 630">P</td> <td data-bbox="703 577 1821 646"> <ul style="list-style-type: none"> <li>• Be familiar with issues such as security principles, insolvency rules, company law principles, banking regulations, execution formalities, etc.</li> </ul> </td> </tr> <tr> <td data-bbox="443 679 506 738">T</td> <td data-bbox="521 679 584 738">P</td> <td data-bbox="703 686 1756 722"> <ul style="list-style-type: none"> <li>• Prepare know-how and articles on new regulations and market developments</li> </ul> </td> </tr> <tr> <td data-bbox="443 756 506 815">T</td> <td data-bbox="521 756 584 815">P</td> <td data-bbox="703 762 1102 799"> <ul style="list-style-type: none"> <li>• Prepare transaction bibles</li> </ul> </td> </tr> </table>	T	P	<ul style="list-style-type: none"> <li>• Arrange for relevant company, court and insolvency searches against companies and review search results</li> </ul>	T	P	<ul style="list-style-type: none"> <li>• Review constitutional documents of companies</li> </ul>	T	P	<ul style="list-style-type: none"> <li>• Prepare Particulars of Charges and Releases</li> </ul>	T	P	<ul style="list-style-type: none"> <li>• Arrange for filing and registration of documents at the Companies Registry</li> </ul>	T	P	<ul style="list-style-type: none"> <li>• Be familiar with issues such as security principles, insolvency rules, company law principles, banking regulations, execution formalities, etc.</li> </ul>	T	P	<ul style="list-style-type: none"> <li>• Prepare know-how and articles on new regulations and market developments</li> </ul>	T	P	<ul style="list-style-type: none"> <li>• Prepare transaction bibles</li> </ul>	
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10.	Practice area – Civil litigation	<p>(b) Civil litigation</p> <ul style="list-style-type: none"> <li>• Attend client meetings / report to and advise client / take instructions from client</li> <li>• Draft <ul style="list-style-type: none"> <li>- Attendance notes</li> <li>- statements of case / memorials</li> <li>- affirmation (for summary judgment or setting aside default judgment)</li> <li>- lists of document / disclosure statements</li> <li>- requests for further information</li> <li>- summonses</li> <li>- witness statements</li> <li>- expert reports</li> <li>- instructions to Counsel</li> <li>- dispute resolution clauses</li> <li>- costs schedules</li> </ul> </li> <li>• Prepare / consider documents for disclosure and prepare disclosure list</li> <li>• Inspect other party's documents</li> <li>• Consider issues of privilege</li> <li>• Instruct Counsel / attend conference with Counsel</li> <li>• Research and analyse points of law and issues of business importance</li> <li>• Attend case management conference / interim hearing</li> <li>• Meet / interview witnesses</li> <li>• Meet / instruct experts</li> </ul>	

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10.	Practice area – Civil litigation (cont'd)	<table border="0"> <tr> <td data-bbox="443 268 501 325">T</td> <td data-bbox="517 268 575 325">P</td> <td data-bbox="703 268 1301 304">• Observe / conduct settlement negotiations</td> </tr> <tr> <td data-bbox="443 352 501 410">T</td> <td data-bbox="517 352 575 410">P</td> <td data-bbox="703 344 1128 381">• Conduct / observe advocacy</td> </tr> <tr> <td data-bbox="443 421 501 478">T</td> <td data-bbox="517 421 575 478">P</td> <td data-bbox="703 419 1128 456">• Prepare / agree trial bundles</td> </tr> <tr> <td data-bbox="443 496 501 553">T</td> <td data-bbox="517 496 575 553">P</td> <td data-bbox="703 494 1158 531">• Attend court / tribunal hearing</td> </tr> </table>	T	P	• Observe / conduct settlement negotiations	T	P	• Conduct / observe advocacy	T	P	• Prepare / agree trial bundles	T	P	• Attend court / tribunal hearing	
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10.	Practice area - Commercial	<p>(c) Commercial</p> <ul style="list-style-type: none"> <li> <div style="display: flex; gap: 10px;"> <div style="border: 1px solid black; padding: 2px 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Assist in taking instructions from client and researching and selecting a commercial structure that will achieve the client's objectives</li> </ul> </li> <li> <div style="display: flex; gap: 10px;"> <div style="border: 1px solid black; padding: 2px 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Assist in drafting related documents required to set up the commercial structures which may include:               <ul style="list-style-type: none"> <li>- simple sale and purchase agreement for a business and completion documents and attend completion</li> <li>- simple sale and purchase agreement for goods</li> <li>- simple joint venture agreements</li> <li>- simple powers of attorney</li> <li>- Simple franchise agreements</li> </ul> </li> </ul> </li> <li> <div style="display: flex; gap: 10px;"> <div style="border: 1px solid black; padding: 2px 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Draft all related documents required to set up the commercial structures</li> </ul> </li> <li> <div style="display: flex; gap: 10px;"> <div style="border: 1px solid black; padding: 2px 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Draft simple employment contracts</li> </ul> </li> <li> <div style="display: flex; gap: 10px;"> <div style="border: 1px solid black; padding: 2px 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Attend to completion</li> </ul> </li> <li> <div style="display: flex; gap: 10px;"> <div style="border: 1px solid black; padding: 2px 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Assist in keeping clients informed of any continuing obligations in relation to the commercial structure</li> </ul> </li> </ul>	



	Area	Briefing / Training / Practical Experience	Duration (with dates)
10.	Practice area - Company	<p>(d) Company</p> <ul style="list-style-type: none"> <li>• Incorporate a company in Hong Kong including drafting memorandum and articles of association and all post-incorporation documents.</li> <li>• Amend Memorandum and Articles of Association and review the same for particular transactions</li> <li>• Register a non-Hong Kong company under Part XI of the Companies Ordinance</li> <li>• Form a general partnership</li> <li>• Assist in the listing of a company on The Stock Exchange of Hong Kong Limited (including assisting in the due diligence exercise and preparation of verification notes)</li> <li>• Draft simple sale and purchase agreement for shares of a private limited company</li> <li>• Assist in the due diligence exercise</li> <li>• Prepare completion documents</li> <li>• Attend completion and attend to stamping of share transfer and related contract notes</li> <li>• Assist in the giving of advice on the legal obligations of corporations and their officers</li> <li>• Assist in identifying generally the stamp duty implications of corporate transactions</li> <li>• Draft simple shareholders' agreement</li> </ul>	

	Area	Briefing / Training / Practical Experience	Duration (with dates)
10.	Practice area – Criminal litigation	<p>(e) Criminal litigation</p> <ul style="list-style-type: none"> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Ensure compliance with relevant Law Society rules and regulations including those related to Anti-Money Laundering</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Conduct legal visits to clients in custody / identification parades</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Locate clients in custody and assist in               <ul style="list-style-type: none"> <li>- advising clients the availability of bail</li> <li>- negotiating the bail terms</li> <li>- advising clients the availability of bail review procedure</li> <li>- advising clients the possible requirement of a surety so that they may identify the likely candidate</li> <li>- advising clients the possible requirement for available funds for bail</li> <li>- contacting family members of clients to update the bail arrangement</li> <li>- advising clients of appropriate behavior in custody e.g. not to talk about their case with other persons in custody</li> </ul> </li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Make periodic enquiry with the law enforcement case office (usually before the bail reporting) to find out the progress of the investigation and the release / charge date</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Assist in advising clients their right of silence – when to exercise it, and when to make use of the first opportunity to speak</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Interview clients and take instructions on the charge, the offence and the nature of defence</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Obtain Prosecution documents to understand the nature and extent of discovery and any unused material</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Familiarise with the admissibility of evidence, prosecution and defence evidence and pre-trial procedures relating to evidential issues e.g. alibi and expert evidence notices</li> </ul> </div> </div> </li> </ul>	

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10.	Practice area – Criminal litigation (cont'd)	<table border="0"> <tr> <td style="border: 1px solid black; text-align: center; width: 30px;">T</td> <td style="border: 1px solid black; text-align: center; width: 30px;">P</td> <td style="padding-left: 20px;">• Assist in assessing a case taking into account the alleged role of the client in the crime and the evidence against the client available to the investigation authorities</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Take proofs of instructions and obtain comments on prosecution evidence</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Conduct site visits</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Preserve evidence and take witness statements</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Attend court proceedings and observe the role of solicitors at court</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Prepare Instructions to Counsel</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Attend and observe the role of solicitors at conferences with Counsel</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Prepare for trial and mitigation</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Assist in assessing a case after the close of the Prosecution's case and in giving advice to client</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Assist in giving advice on grounds of appeal against conviction and sentence</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Keep accurate attendance notes / time records</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Draw up bills of costs</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Follow up on the recovery of costs</td> </tr> </table>	T	P	• Assist in assessing a case taking into account the alleged role of the client in the crime and the evidence against the client available to the investigation authorities	T	P	• Take proofs of instructions and obtain comments on prosecution evidence	T	P	• Conduct site visits	T	P	• Preserve evidence and take witness statements	T	P	• Attend court proceedings and observe the role of solicitors at court	T	P	• Prepare Instructions to Counsel	T	P	• Attend and observe the role of solicitors at conferences with Counsel	T	P	• Prepare for trial and mitigation	T	P	• Assist in assessing a case after the close of the Prosecution's case and in giving advice to client	T	P	• Assist in giving advice on grounds of appeal against conviction and sentence	T	P	• Keep accurate attendance notes / time records	T	P	• Draw up bills of costs	T	P	• Follow up on the recovery of costs	
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10.	Practice area - Family	<p>(f) Family</p> <ul style="list-style-type: none"> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Attend clients for instructions in family matters of dispute, divorce, ancillary relief and custody, and access</li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Be aware of               <ul style="list-style-type: none"> <li>- relevant practice directions</li> <li>- major ordinances and rules for matrimonial practice</li> <li>- FDR process</li> <li>- mediation process</li> </ul> </li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Draft               <ul style="list-style-type: none"> <li>- Petition and Answer and all related statutory documents</li> <li>- all forms of Notices</li> <li>- Affidavits / Affirmations</li> <li>- Form E</li> <li>- Summonses / consent summonses</li> <li>- Basic Orders</li> <li>- letters to parties and own clients</li> <li>- instructions to Counsel</li> </ul> </li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Prepare               <ul style="list-style-type: none"> <li>- bundles for hearing</li> <li>- the First Appointment Bundle including preparing the Estimate of Costs.</li> <li>- meeting notes</li> <li>- hearings</li> </ul> </li> </ul> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <ul style="list-style-type: none"> <li>• Handle               <ul style="list-style-type: none"> <li>- clients</li> <li>- Counsel</li> <li>- accounts</li> <li>- documentary evidence</li> </ul> </li> </ul> </div> </li> </ul>	

	Area	Briefing / Training / Practical Experience	Duration (with dates)
10.	Practice area - Insolvency	<p>(g) Insolvency</p> <ul style="list-style-type: none"> <li>• Draft <ul style="list-style-type: none"> <li>- statutory demand</li> <li>- Winding up and Bankruptcy Petitions</li> </ul> </li>   <li>• Obtain Certificate of Compliance from Master</li>   <li>• Attend <ul style="list-style-type: none"> <li>- the first hearing of the Petition</li> <li>- the creditors' meeting</li> <li>- the election of Committee of Inspection</li> <li>- adjudication of Proof and file Objection if necessary</li> </ul> </li>   <li>• Prepare Proof of Debt</li>   <li>• Assist in the paper work for <ul style="list-style-type: none"> <li>- the appointment of Provisional Liquidators</li> <li>- the formation and administration of scheme of arrangement</li> </ul> </li>   <li>• Understand the present arrangement of the Official Receivers' Office to appoint outside insolvency practitioners as receivers / liquidators</li> </ul>	

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10.	Practice area – Intellectual property	<p>(h) Intellectual property</p> <p><u>Contentious</u></p> <table border="0"> <tr> <td data-bbox="456 389 517 443">T</td> <td data-bbox="533 389 593 443">P</td> <td data-bbox="719 384 1883 448">• Conduct and/or arrange for company, business, domain name and IP registration searches against infringers</td> </tr> <tr> <td data-bbox="456 488 517 542">T</td> <td data-bbox="533 488 593 542">P</td> <td data-bbox="719 491 1883 560">• Search the Internet for evidence of infringement and/or contact details of potential infringers</td> </tr> <tr> <td data-bbox="456 608 517 662">T</td> <td data-bbox="533 608 593 662">P</td> <td data-bbox="719 603 1368 635">• Draft warning and chasing letters to infringers</td> </tr> <tr> <td data-bbox="456 683 517 737">T</td> <td data-bbox="533 683 593 737">P</td> <td data-bbox="719 678 1854 710">• Negotiate with infringers with a view to obtaining an undertaking and compensation</td> </tr> <tr> <td data-bbox="456 758 517 812">T</td> <td data-bbox="533 758 593 812">P</td> <td data-bbox="719 753 1845 785">• Prepare letters of undertaking and attend infringers to execute letters of undertaking</td> </tr> <tr> <td data-bbox="456 833 517 887">T</td> <td data-bbox="533 833 593 887">P</td> <td data-bbox="719 828 1883 892">• Report cases to Customs and attend examination of counterfeit merchandise seized by Customs</td> </tr> <tr> <td data-bbox="456 956 517 1010">T</td> <td data-bbox="533 956 593 1010">P</td> <td data-bbox="719 935 1883 1042">• Visit the places of business of infringers to check for counterfeit merchandise and assess the use of confusingly similar marks and/or reproduction of copyrighted works and report</td> </tr> <tr> <td data-bbox="456 1078 517 1133">T</td> <td data-bbox="533 1078 593 1133">P</td> <td data-bbox="719 1074 1205 1106">• Draft instructions to investigators</td> </tr> <tr> <td data-bbox="456 1169 517 1224">T</td> <td data-bbox="533 1169 593 1224">P</td> <td data-bbox="719 1149 1267 1181">• Attend Trade Marks Registry hearings</td> </tr> <tr> <td data-bbox="456 1244 517 1299">T</td> <td data-bbox="533 1244 593 1299">P</td> <td data-bbox="719 1240 1335 1272">• Draft Writ with a generally endorsed Claim</td> </tr> <tr> <td data-bbox="456 1319 517 1374">T</td> <td data-bbox="533 1319 593 1374">P</td> <td data-bbox="719 1315 1238 1347">• Prepare Timetabling Questionnaires</td> </tr> <tr> <td data-bbox="456 1378 517 1433">T</td> <td data-bbox="533 1378 593 1433">P</td> <td data-bbox="719 1374 1626 1406">• Advise client on the possibility of mediation / other ADR methods</td> </tr> </table>	T	P	• Conduct and/or arrange for company, business, domain name and IP registration searches against infringers	T	P	• Search the Internet for evidence of infringement and/or contact details of potential infringers	T	P	• Draft warning and chasing letters to infringers	T	P	• Negotiate with infringers with a view to obtaining an undertaking and compensation	T	P	• Prepare letters of undertaking and attend infringers to execute letters of undertaking	T	P	• Report cases to Customs and attend examination of counterfeit merchandise seized by Customs	T	P	• Visit the places of business of infringers to check for counterfeit merchandise and assess the use of confusingly similar marks and/or reproduction of copyrighted works and report	T	P	• Draft instructions to investigators	T	P	• Attend Trade Marks Registry hearings	T	P	• Draft Writ with a generally endorsed Claim	T	P	• Prepare Timetabling Questionnaires	T	P	• Advise client on the possibility of mediation / other ADR methods	
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T	P	<ul style="list-style-type: none"> <li>Draft / review IP licences / assignments</li> </ul>																																											
T	P	<ul style="list-style-type: none"> <li>Prepare trade mark applications</li> </ul>																																											

	Area	Briefing / Training / Practical Experience	Duration (with dates)															
10.	Practice area – Intellectual property (cont'd)	<table border="0"> <tr> <td style="border: 1px solid black; padding: 2px; text-align: center;">T</td> <td style="border: 1px solid black; padding: 2px; text-align: center;">P</td> <td style="padding-left: 20px;">• Advise on registrability of trade marks</td> </tr> <tr> <td style="border: 1px solid black; padding: 2px; text-align: center;">T</td> <td style="border: 1px solid black; padding: 2px; text-align: center;">P</td> <td style="padding-left: 20px;">• Draft deficiencies reports to client</td> </tr> <tr> <td style="border: 1px solid black; padding: 2px; text-align: center;">T</td> <td style="border: 1px solid black; padding: 2px; text-align: center;">P</td> <td style="padding-left: 20px;">• Report official actions to client</td> </tr> <tr> <td style="border: 1px solid black; padding: 2px; text-align: center;">T</td> <td style="border: 1px solid black; padding: 2px; text-align: center;">P</td> <td style="padding-left: 20px;">• Prepare arguments to overcome citations</td> </tr> <tr> <td style="border: 1px solid black; padding: 2px; text-align: center;">T</td> <td style="border: 1px solid black; padding: 2px; text-align: center;">P</td> <td style="padding-left: 20px;">• Handle domain name registrations</td> </tr> </table>	T	P	• Advise on registrability of trade marks	T	P	• Draft deficiencies reports to client	T	P	• Report official actions to client	T	P	• Prepare arguments to overcome citations	T	P	• Handle domain name registrations	
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	Area	Briefing / Training / Practical Experience	Duration (with dates)
10.	Practice area - Property	<p>(i) Property</p> <ul style="list-style-type: none"> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Draft and approve               <ul style="list-style-type: none"> <li>- agreements for Sale and Purchase</li> <li>- assignments</li> <li>- tenancy agreement</li> </ul> </li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Attend to stamping and registration</li> </ul> </div> </div> </li> <li> <div style="display: flex; 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align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Peruse Memorandum and Articles of Association of companies and prepare Board and Shareholders' Resolution</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Prepare Mortgages, Equitable Mortgages, Guarantees and reporting letters to banks and engaging in completion procedures</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Assist in loan transactions</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Prepare Releases</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <div style="margin-left: 20px;"> <ul style="list-style-type: none"> <li>• Manage general file maintenance</li> </ul> </div> </div> </li> <li> <div style="display: flex; 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	Area	Briefing / Training / Practical Experience	Duration (with dates)
10.	Practice area – Trusts, wills and probate	<p>(j) Trusts, wills and probate</p> <ul style="list-style-type: none"> <li>• Familiarise with the laws of Wills, Wills Drafting and Testate and Intestate Succession</li> <li>• Understand the procedures relating to obtaining estate duty clearance, application for grant of representation and administration of estate</li> <li>• Ensure compliance with the Law Society rules and regulations and guidelines including those on Anti-Money Laundering</li> <li>• Draft Wills <ul style="list-style-type: none"> <li>- Understand client’s instructions and identify client’s goals</li> <li>- Identify and analyze relevant legal and factual issues</li> <li>- Advise clients on matters to consider on Wills drafting before taking instructions on Wills drafting</li> <li>- Critically use precedents to facilitate drafting</li> <li>- Explain the contents of the Will to clients</li> <li>- Attend to attestation of Will</li> </ul> </li> </ul>	



	Area	Briefing / Training / Practical Experience	Duration (with dates)
10.	Practice area – Trusts, wills and probate (cont'd)	<div style="display: flex; gap: 10px;"> <div style="border: 1px solid black; padding: 2px 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Practise the Administration of Estates <ul style="list-style-type: none"> <li>- Identify and apply legal principles in explaining to clients how an estate is distributed</li> <li>- Collect, secure and manage assets</li> <li>- Pay debts and other liabilities</li> <li>- Distribute the estate to the beneficiaries</li> </ul> </li> </ul>	

9 November 2009