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1. Technology Trends for 2008

Legal technology expert [Dennis Kennedy](#) writes an annual legal technology trend update. His article for the current year, [Eight Legal Technology Trends for 2008 - Good Times, Bad Times or Hard Times in Legal Tech?](#) is featured on the website <http://www.llrx.com/> which is itself a good source for information on legal technology and related issues. Also on the topic of legal technology, the American Bar Association's March 2008 issue of [Law Practice](#) magazine focuses entirely on technology and provides numerous valuable tips from many of the presenters at the recent ABA Tech Show.

2. Cheque Imaging and Record-Keeping

Law Society Rules [5-42\(1\)](#) and [5-48.1\(1\)\(c\)](#) require that lawyers maintain up-to-date records for all trust accounts and general accounts. In addition to the basic records, lawyers must also maintain all documentation to support the entries made in those records. This includes such documents as: bank statements, pass books, cash receipts, deposit slips, bank advices, invoices and copies of any correspondence on a file that relates to a trust transaction. Cancelled (cleared) cheques are an integral support document and should always be maintained with the bank statement. Many financial institutions (FI) now advise that they will no longer return the actual cheque to their banking customers; instead, they will provide a paper copy of a cheque image or an on-line image. Lawyers should remember that they must obtain the original cleared cheque or request from their FI a legible imaged copy of both front and back of the cheque. Too many images on the printed page will greatly reduce the legibility. Also remember that you must maintain a hardcopy of each cheque image; if your FI only provides on-line access to the images, you must ensure you print the images each month. For further details, read [Cheque Imaging: How to meet Law Society Requirements](#) published in the April 2007 issue of [Communiqué](#).

3. A Vacation Planning Resource (and more!)

Although it's only April, it's already time to start planning for your summer vacation. If you weren't there, [get the materials](#) from the recent Law Society CLE program *Family Practice Makeover* and read the article *The Nuts & Bolts of Taking a Vacation* by Lonny Balbi, Q.C. The article provides a thorough review of the issues you need to address before you go so that you can truly relax and enjoy the down time you've scheduled. (And while you're at it, also take a look at the articles on flat-fee billing and client selection in the same materials.)

4. Client Relations Resources

The January/February 2008 issue of the American Bar Association's [*GP Solo Magazine*](#) is themed *The Care & Feeding of Clients* and contains the following articles:

- [*The Client Matters*](#) by Robert A. Kraft
- [*Customer Service Essentials*](#) by Nina L. Kaufman
- [*Client Communication and Contact*](#) by Betty Adams
- [*Malpractice: What We Have Here Is a Failure to Communicate*](#) by Timothy J. Gephart
- [*Billing 101*](#) by Allison C. Shields
- [*Ethical Hazards of Solo and Small Firm Practice*](#) by Benjamin Cowgill

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