NOVA SCOTIA
BARRISTERS' SOCIETY

**Legal Services Support**

**Targeted Paper Reduction Project Guide**

Do you have paper files? To help your retirement or succession go smoothly, we recommend a targeted paper reduction project aimed at the biggest long-term storage and succession hurdles. Eliminate indefinite responsibilities that weigh you down most, and move on to shredding to reduce volume and protect privacy.

1.  **Create** a file retention/destruction policy. You may use our *Template Policy*. Do this now.

2.  **End** the practice of keeping the papers mentioned in this plan. Do this now.

Then go through your old files systematically, over time. As you do:

3.  **Return** paper responsibilities to your clients, over time, wherever possible:
    *   All original wills and single-original POAs;
    *   Original client documents in closed files;
    *   All minute books, or at least those where you are: not actively engaged in updating them, or have any risk of losing contact with your client;
    *   Other returnable papers – *see (possible new guide of checklist for closing file)*.

4.  **Purge** duplicates, research (your memos are likely electronic, save them that way), materials that can reliably be reproduced later from an authority and other unnecessary contents.

5.  **Scan** three burdensome things, then index and back them up. Scan over time, but set a time. Scan in house. Convert these three long-term succession obstacles into electronic form. Make them easily received - without undue burden - by a successor. Each is described in more detail in our *Guide to Succession Planning*:
    *   Will & POA files (not the original wills or POA)
    *   Foundation documents from real estate transactions [i]
    *   The irreplaceable [ii] documents from old unreturnable minute books (see *Guide*)

As you scan, shred the paper copies.

6.  **Shred**
    *   Follow your policy and shred. A good policy will help you achieve significant reduction. Start soon and watch your burden shrink.
    *   Group your remaining files by destruction date to make it easier to shred them.

To make this work well, set goals, devote regular time, and make tasks part of people's responsibilities.

Get creative about finding clients to return documents: use Facebook, Google, LinkedIn, POL, RJSC…

If you reduce your existing paper, even in a targeted way, you will boost your ability to:

- change category and retire when you want,
- change careers smoothly and quickly,
- attract someone to take your practice,
- help your successor or steward wind up your practice, and
- reduce worry.

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[i] *LPA Regulation* 1.1.1 (ma) "foundation documents" means information on which a practicing lawyer relied in support of the exercise of professional judgment in rendering an opinion of title or certificate of legal effect, and includes an abstract of title, searches, documents, notes, survey fabric, or other title information, whether prepared by the lawyer or others and all information required to be kept pursuant to the Land Registration Administration Regulations.

[ii] In a typical NS minute book, the irreplaceable parts are any evidence of ownership (legal or beneficial) like share certificates and share ledgers, and minutes. The replaceable parts are the Articles, Memorandum, Special Resolutions and list of officers and directors, because they are on file at RJSC.