

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
 - (xi) international law

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. | Induction | <p>(a) Briefing on office procedures</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) Briefing on office and IT systems</p> <ul style="list-style-type: none"> <input type="checkbox"/> • Filing system <input type="checkbox"/> • Archiving system <input type="checkbox"/> • Library <input type="checkbox"/> • Research facilities <input type="checkbox"/> • Computer software in use <input type="checkbox"/> • Use of Internet <input type="checkbox"/> • Use of E-mail <p>(c) Briefing on structure of training</p> <ul style="list-style-type: none"> <input type="checkbox"/> • Registration of trainee solicitor contract <input type="checkbox"/> • Seat rotation <input type="checkbox"/> • Requirement on the completion and maintenance of a training record for the duration of the contract <input type="checkbox"/> • Continuing professional development requirement for trainees <input type="checkbox"/> • Student membership of the Law Society | | |

| | 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>(a) Fiduciary duty</p> <p>T P • Act in client's best interests with honesty, openness and fairness</p> <p>T P • Handle conflict check (between solicitor and client and between clients)</p> <p>T P • Identify any potential or actual conflict</p> <p>T P • Take appropriate action to deal with any actual conflict or to avoid any potential conflict arising in the future</p> <p>(b) Confidentiality</p> <p>T P • Recognise and comply with the duty of confidentiality owed to clients</p> <p>(c) Professional undertakings</p> <p>T P • Draft professional undertakings taking into account the effect and the responsibilities embodied in such undertakings</p> <p>T 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> | |

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|----|---------------------------------|--|----------------|--------------------------|
| 2. | Professional ethics (cont'd) | <p>(d) Professional fees</p> <p>T P • Draft written advice on cost estimates / availability of legal aid</p> <p>T P • Draft bills of costs (interim and final)</p> <p>T P • Draft written records of agreed fees</p> <p>T P • Follow up on the settlement of the bills / agreed fees</p> <p>T P • Understand the office procedures on issue of receipts and payment of fees into office / client accounts / third parties</p> <p>T P • Understand the prohibition against profit sharing with unqualified persons</p> | | |

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|----|----------------------|--|---|--------------------------|
| 3. | Communication skills | <div> <div>T</div> <div>P</div> <div>(a)</div> <div>Draft letters to clients, internal notes and memos</div> </div> <div> <div>T</div> <div>P</div> <div>(b)</div> <div>Report orally to clients and others by telephone or at meetings</div> </div> | <p>Ability to</p> <p>(i) identify with respect to a proposed communication:</p> <ul style="list-style-type: none"> - the purpose; and - the most appropriate and effective way of making it; and <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> | |

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| 4. | Practice support skills | <div> <div>T</div> <div>P</div> <div>(a)</div> <div>Run small transactions under close supervision and gain experience in case management</div> </div> <div> <div>T</div> <div>P</div> <div>(b)</div> <div>Work on larger transactions as a member of a team and gain experience in team work</div> </div> | <p>Ability to</p> <div> <div>(i)</div> <div>manage personal workload efficiently;</div> </div> <div> <div>(ii)</div> <div>work effectively as a team member;</div> </div> <div> <div>(iii)</div> <div>use information technology competently to improve work efficiency;</div> </div> <div> <div>(iv)</div> <div>keep appropriate file records in an orderly manner and render timely bills;</div> </div> <div> <div>(v)</div> <div>keep clients fully informed of all developments in their matter in a professional manner;</div> </div> <div> <div>(vi)</div> <div>recognise any signs of client dissatisfaction and act appropriately;</div> </div> <div> <div>(vii)</div> <div>conduct each matter in a way that minimises any risk to client and law firm;</div> </div> <div> <div>(viii)</div> <div>identify clients' problems and objectives and generate possible solutions for evaluation based on merits and risks;</div> </div> <div> <div>(ix)</div> <div>plan and review progress of case / transaction and bring matters to a timely and client-satisfactory conclusion.</div> </div> | |

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

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

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

| | Area | Briefing / Training / Practical Experience | Target Outcome | Duration (with dates) |
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| 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 <input type="checkbox"/> (k) International law | 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"> <div>T</div> <div>P</div> Draft simple loan agreements, guarantees, security documents, related board minutes, director's certificates and other ancillary documents <div>T</div> <div>P</div> 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 <div>T</div> <div>P</div> Assist in Debt Capital Markets transactions, including drafting, reviewing and commenting on offering materials, placement / subscription agreements and ancillary documents <div>T</div> <div>P</div> Assist in preparing debt sell down and transfer documentation including assignments and sub-participations <div>T</div> <div>P</div> Assist in reviewing derivatives documentation (including swap documentation) and be familiar with market standard documentation (ISDA) <div>T</div> <div>P</div> Draft / review legal opinions and liaise with foreign Counsel in relation to legal opinions on foreign law <div>T</div> <div>P</div> Draft / review and collate conditions precedent documents and liaise with various parties throughout the process of fulfilling conditions precedent requirements <div>T</div> <div>P</div> Draft / review and comment on commitment letters, fee letters, term sheets and engagement letters <div>T</div> <div>P</div> Be familiar with loan market standard form documentation (e.g. APLMA and LMA standard form documents) from both lender and borrower perspective | |

| | Area | Briefing / Training / Practical Experience | | Duration (with dates) |
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| 10. | Practice area – Banking (cont'd) | <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> | <ul style="list-style-type: none"> • Arrange for relevant company, court and insolvency searches against companies and review search results • Review constitutional documents of companies • Prepare Particulars of Charges and Releases • Arrange for filing and registration of documents at the Companies Registry • Be familiar with issues such as security principles, insolvency rules, company law principles, banking regulations, execution formalities, etc. • Prepare know-how and articles on new regulations and market developments • Prepare transaction bibles | |
| 10. | Practice area – Civil litigation | <div>T</div> <div>P</div> <div>T</div> <div>P</div> | <p>(b) Civil litigation</p> <ul style="list-style-type: none"> • Attend client meetings / report to and advise client / take instructions from client • Draft <ul style="list-style-type: none"> - Attendance notes - statements of case / memorials - affirmation (for summary judgment or setting aside default judgment) - lists of document / disclosure statements - requests for further information - summonses - witness statements - expert reports - instructions to Counsel - dispute resolution clauses - costs schedules | |

| | Area | Briefing / Training / Practical Experience | | Duration (with dates) |
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| 10. | Practice area – Civil litigation (cont'd) | <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> | <ul style="list-style-type: none"> • Prepare / consider documents for disclosure and prepare disclosure list • Inspect other party's documents • Consider issues of privilege • Instruct Counsel / attend conference with Counsel • Research and analyse points of law and issues of business importance • Attend case management conference / interim hearing • Meet / interview witnesses • Meet / instruct experts • Observe / conduct settlement negotiations • Conduct / observe advocacy • Prepare / agree trial bundles • Attend court / tribunal hearing | |

| | Area | Briefing / Training / Practical Experience | Duration (with dates) |
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| 10. | Practice area - Commercial | <p>(c) Commercial</p> <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> Assist in taking instructions from client and researching and selecting a commercial structure that will achieve the client's objectives <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> Assist in drafting related documents required to set up the commercial structures which may include: <ul style="list-style-type: none"> simple sale and purchase agreement for a business and completion documents and attend completion simple sale and purchase agreement for goods simple joint venture agreements simple powers of attorney Simple franchise agreements <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> Draft all related documents required to set up the commercial structures <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> Draft simple employment contracts <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> Attend to completion <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> Assist in keeping clients informed of any continuing obligations in relation to the commercial structure | |

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| 10. | Practice area - Company | <p>(d) Company</p> <ul style="list-style-type: none"> <div>T</div> <div>P</div> Incorporate a company in Hong Kong including drafting memorandum and articles of association and all post-incorporation documents. <div>T</div> <div>P</div> Amend Memorandum and Articles of Association and review the same for particular transactions <div>T</div> <div>P</div> Register a non-Hong Kong company under Part XI of the Companies Ordinance <div>T</div> <div>P</div> Form a general partnership <div>T</div> <div>P</div> 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) <div>T</div> <div>P</div> Draft simple sale and purchase agreement for shares of a private limited company <div>T</div> <div>P</div> Assist in the due diligence exercise <div>T</div> <div>P</div> Prepare completion documents <div>T</div> <div>P</div> Attend completion and attend to stamping of share transfer and related contract notes <div>T</div> <div>P</div> Assist in the giving of advice on the legal obligations of corporations and their officers <div>T</div> <div>P</div> Assist in identifying generally the stamp duty implications of corporate transactions <div>T</div> <div>P</div> Draft simple shareholders' agreement | |

| | Area | Briefing / Training / Practical Experience | Duration (with dates) |
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| 10. | Practice area – Criminal litigation | <p>(e) Criminal litigation</p> <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> • Ensure compliance with relevant Law Society rules and regulations including those related to Anti-Money Laundering <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> • Conduct legal visits to clients in custody / identification parades <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> • Locate clients in custody and assist in <ul style="list-style-type: none"> - advising clients the availability of bail - negotiating the bail terms - advising clients the availability of bail review procedure - advising clients the possible requirement of a surety so that they may identify the likely candidate - advising clients the possible requirement for available funds for bail - contacting family members of clients to update the bail arrangement - advising clients of appropriate behavior in custody e.g. not to talk about their case with other persons in custody <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> • 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 <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> • Assist in advising clients their right of silence – when to exercise it, and when to make use of the first opportunity to speak <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> • Interview clients and take instructions on the charge, the offence and the nature of defence <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> • Obtain Prosecution documents to understand the nature and extent of discovery and any unused material <div> <div>T</div> <div>P</div> </div> <ul style="list-style-type: none"> • 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 | |

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| 10. | Practice area – Criminal litigation (cont’d) | <table><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr><tr><td>T</td><td>P</td></tr></table> | T | P | T | P | T | P | T | P | T | P | T | P | T | P | T | P | T | P | T | P | T | P | T | P | T | P | <ul style="list-style-type: none">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 authoritiesTake proofs of instructions and obtain comments on prosecution evidenceConduct site visitsPreserve evidence and take witness statementsAttend court proceedings and observe the role of solicitors at courtPrepare Instructions to CounselAttend and observe the role of solicitors at conferences with CounselPrepare for trial and mitigationAssist in assessing a case after the close of the Prosecution's case and in giving advice to clientAssist in giving advice on grounds of appeal against conviction and sentenceKeep accurate attendance notes / time recordsDraw up bills of costsFollow up on the recovery of costs | |
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| 10. | Practice area - Family | <p>(f) Family</p> <div> <div>T</div> <div>P</div> <ul style="list-style-type: none"> Attend clients for instructions in family matters of dispute, divorce, ancillary relief and custody, and access </div> <div> <div>T</div> <div>P</div> <ul style="list-style-type: none"> Be aware of <ul style="list-style-type: none"> relevant practice directions major ordinances and rules for matrimonial practice FDR process mediation process </div> <div> <div>T</div> <div>P</div> <ul style="list-style-type: none"> Draft <ul style="list-style-type: none"> Petition and Answer and all related statutory documents all forms of Notices Affidavits / Affirmations Form E Summonses / consent summonses Basic Orders letters to parties and own clients instructions to Counsel </div> <div> <div>T</div> <div>P</div> <ul style="list-style-type: none"> Prepare <ul style="list-style-type: none"> bundles for hearing the First Appointment Bundle including preparing the Estimate of Costs. meeting notes hearings </div> <div> <div>T</div> <div>P</div> <ul style="list-style-type: none"> Handle <ul style="list-style-type: none"> clients Counsel accounts documentary evidence </div> | |

| | Area | Briefing / Training / Practical Experience | Duration (with dates) |
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| 10. | Practice area - Insolvency | <p>(g) Insolvency</p> <ul style="list-style-type: none"> <div> <div>T</div> <div>P</div> </div> Draft <ul style="list-style-type: none"> - statutory demand - Winding up and Bankruptcy Petitions <div> <div>T</div> <div>P</div> </div> Obtain Certificate of Compliance from Master <div> <div>T</div> <div>P</div> </div> Attend <ul style="list-style-type: none"> - the first hearing of the Petition - the creditors' meeting - the election of Committee of Inspection - adjudication of Proof and file Objection if necessary <div> <div>T</div> <div>P</div> </div> Prepare Proof of Debt <div> <div>T</div> <div>P</div> </div> Assist in the paper work for <ul style="list-style-type: none"> - the appointment of Provisional Liquidators - the formation and administration of scheme of arrangement <div> <div>T</div> <div>P</div> </div> Understand the present arrangement of the Official Receivers' Office to appoint outside insolvency practitioners as receivers / liquidators | |

| | Area | Briefing / Training / Practical Experience | | Duration (with dates) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| 10. | Practice area – Intellectual property | (h) | <div>Intellectual property</div> <div><u>Contentious</u></div> <div><table><tr><td>T</td><td>P</td><td>• Conduct and/or arrange for company, business, domain name and IP registration searches against infringers</td></tr><tr><td>T</td><td>P</td><td>• Search the Internet for evidence of infringement and/or contact details of potential infringers</td></tr><tr><td>T</td><td>P</td><td>• Draft warning and chasing letters to infringers</td></tr><tr><td>T</td><td>P</td><td>• Negotiate with infringers with a view to obtaining an undertaking and compensation</td></tr><tr><td>T</td><td>P</td><td>• Prepare letters of undertaking and attend infringers to execute letters of undertaking</td></tr><tr><td>T</td><td>P</td><td>• Report cases to Customs and attend examination of counterfeit merchandise seized by Customs</td></tr><tr><td>T</td><td>P</td><td>• 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>T</td><td>P</td><td>• Draft instructions to investigators</td></tr><tr><td>T</td><td>P</td><td>• Attend Trade Marks Registry hearings</td></tr><tr><td>T</td><td>P</td><td>• Draft Writ with a generally endorsed Claim</td></tr><tr><td>T</td><td>P</td><td>• Prepare Timetabling Questionnaires</td></tr><tr><td>T</td><td>P</td><td>• Advise client on the possibility of mediation / other ADR methods</td></tr></table></div> | 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 | • Search the Internet for evidence of infringement and/or contact details of potential infringers | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| 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 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| T | P | • Prepare Timetabling Questionnaires | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| T | P | • Advise client on the possibility of mediation / other ADR methods | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| | Area | Briefing / Training / Practical Experience | | Duration (with dates) |
|-----|--|---|--|--------------------------|
| 10. | Practice area – Intellectual property (cont’d) | <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <ul style="list-style-type: none">• Advise on registrability of trade marks• Draft deficiencies reports to client• Report official actions to client• Prepare arguments to overcome citations• Handle domain name registrations | | |
| 10. | Practice area - Property | <div>(i)</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <div>T</div> <div>P</div> <ul style="list-style-type: none">• Property<ul style="list-style-type: none">• Draft and approve<ul style="list-style-type: none">- agreements for Sale and Purchase- assignments- tenancy agreement• Attend to stamping and registration• Approve title• Assist in execution• Attend to filing and registration of documents at Companies Registry and Land Registry• Peruse Memorandum and Articles of Association of companies and prepare Board and Shareholders’ Resolution | | |

| | Area | Briefing / Training / Practical Experience | | Duration (with dates) |
|-----|--|---|--|--------------------------|
| 10. | Practice area – Property (cont'd) | <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Prepare Mortgages, Equitable Mortgages, Guarantees and reporting letters to banks and engaging in completion procedures <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Assist in loan transactions <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Prepare Releases <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Manage general file maintenance <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Assist in dealing with clients <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Ensure compliance with Law Society's rules, regulations and guidelines including those on Anti-Money Laundering | | |
| 10. | Practice area – Trusts, wills and probate | <div>(j)</div> <div>Trusts, wills and probate</div> <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Familiarise with the laws of Wills, Wills Drafting and Testate and Intestate Succession <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Understand the procedures relating to obtaining estate duty clearance, application for grant of representation and administration of estate <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Ensure compliance with the Law Society rules and regulations and guidelines including those on Anti-Money Laundering | | |

| | Area | Briefing / Training / Practical Experience | Duration (with dates) |
|-----|--|---|--------------------------|
| 10. | Practice area – Trusts, wills and probate (cont'd) | <div> <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Draft Wills <ul style="list-style-type: none"> - Understand client's instructions and identify client's goals - Identify and analyze relevant legal and factual issues - Advise clients on matters to consider on Wills drafting before taking instructions on Wills drafting - Critically use precedents to facilitate drafting - Explain the contents of the Will to clients - Attend to attestation of Will </div> <div> <div>T</div> <div>P</div> <ul style="list-style-type: none"> • Obtain estate duty clearance for persons who died before 11 February 2006: <ul style="list-style-type: none"> - Understand key charging and exemption provisions in the Estate Duty Ordinance and case laws - Understand the significance of compliance under the Estate Duty Ordinance to applications for grant of representation - Elicit relevant facts and information for the purpose of obtaining estate duty clearance for the estate - Complete Estate Duty Forms in order to obtain clearance - Attend with representatives of the Home Affairs Department for the opening of Safe Deposit Box and inventory taking </div> | |

| | Area | Briefing / Training / Practical Experience | Duration (with dates) |
|-----|--|---|--------------------------|
| 10. | Practice area – Trusts, wills and probate (cont'd) | <div> <div>T</div> <div>P</div> <ul style="list-style-type: none"> Obtain Grants of Representation to a Deceased estate including: <ul style="list-style-type: none"> Understand formalities and procedures to be followed in obtaining a Grant of Representation Prepare the Schedule of Properties Draft the necessary affirmations / affidavits to obtain a Grant Identify the supporting documents required for the application </div> <div> <div>T</div> <div>P</div> <ul style="list-style-type: none"> Practise the Administration of Estates <ul style="list-style-type: none"> Identify and apply legal principles in explaining to clients how an estate is distributed Collect, secure and manage assets Pay debts and other liabilities Distribute the estate to the beneficiaries </div> | |

| | Area | Briefing / Training / Practical Experience | Duration (with dates) |
|-----|--------------------------------------|--|--------------------------|
| 11. | Practice area – International law | <p>(k) International law (Private and Public International Law)</p> <ul style="list-style-type: none"> <div>T</div> <div>P</div> Assist in advising on international matters such as international trade and investment law, international environmental and energy law, privileges and immunities of States and international organizations, international human rights law, State recognition, secession and succession, international sanctions and export control matters, the law of war, the Law of the Sea. <div>T</div> <div>P</div> Assist in the drafting, interpreting and advising on and enforcing international treaties and conventions. <div>T</div> <div>P</div> Assist in bringing or defending claims on international disputes and international law violations such as maritime and territorial and boundary disputes. <div>T</div> <div>P</div> Assist in advising on international criminal law and international criminal matters. <div>T</div> <div>P</div> Attend hearings in international courts or tribunals or hearings on public international law issues arising in domestic courts, or investment treaty arbitrations. <div>T</div> <div>P</div> Liaise with sovereign governments, multinational corporations, international non-governmental organizations such as the United Nations, the European Union and the World Trade Organization. <div>T</div> <div>P</div> Attend international meetings and conferences which discuss multilateral agreements and treaties amongst different countries such as meetings organized by the World Trade Organization, the Hague Conference on Private International Law, the United Nations Commission on International Trade Law or the International Civil Aviation Organization. | |