

# Essentials: Effective file management strategies

Recorded: 30 May 2019 | 60 minutes  
2019/2020 CPD year

## Overview

This session covers the fundamental file management steps that should be taken for all matters including guidance on how to:

- store and retrieve key information regarding all firm clients and opposing parties
- open and maintain active client files
- check for conflicts
- check for limitation periods
- close, retain, and dispose of closed files
- identify clients' property and place in safe custody

1 CPD Point

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60 minutes

## Effective file management strategies



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- store and retrieve key information regarding all firm clients and opposing parties
- open and maintain active client files
- check for conflicts
- check for limitation periods
- close, retain, and dispose of closed files
- identify clients' property and place in safe custody
- ensure processes comply with the *Australian Solicitors Conduct Rules 2012*.

Presenters:

**Mark Illidge**, Practice Support Solicitor, QLS Ethics and Practice Centre, Queensland Law Society

**Judy Hayward**, Risk Solicitor, Lexon Insurance

Host: **Eleanor Sondergeld**, Junior Legal Professional Development Executive, Queensland Law Society

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