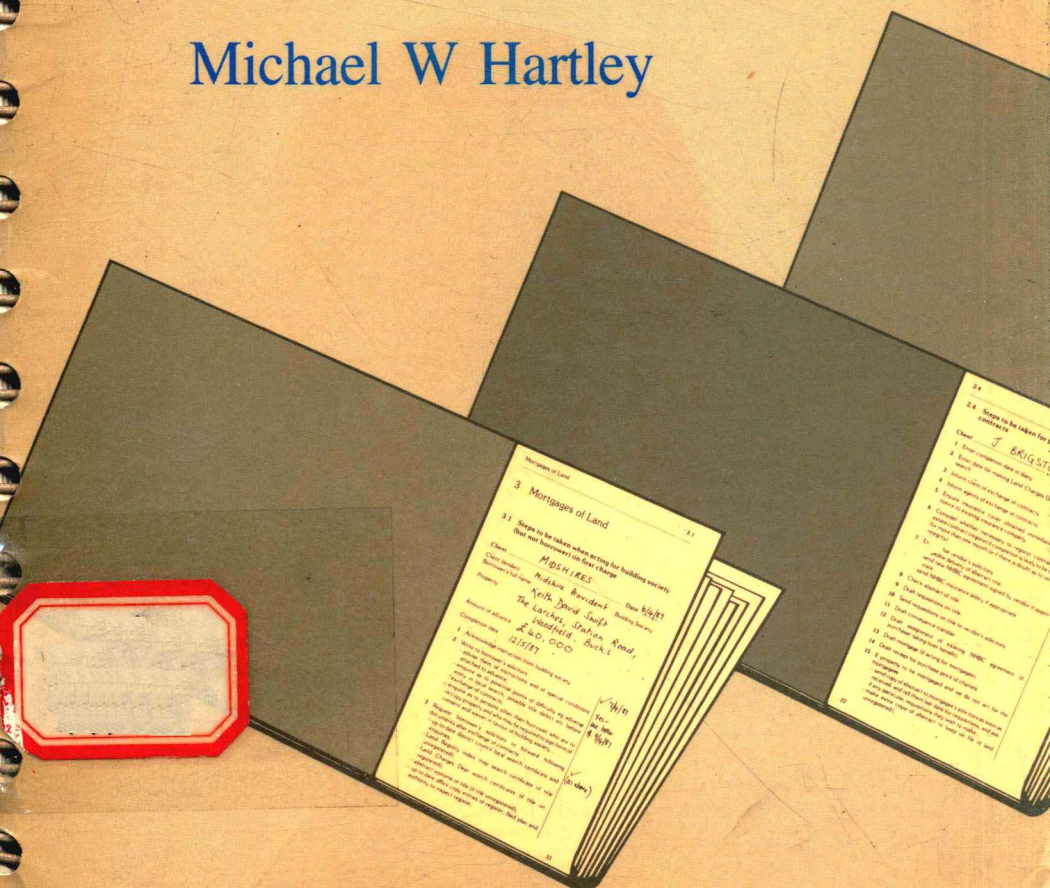


# Checklists For Solicitors

Michael W Hartley



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*fifth edition*

Michael W. Hartley

*Solicitor, Partner with Speechly Bircham*

  
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## Preface

This new edition of Checklists for Solicitors is larger than the earlier admirable book. This increase in size is due to the addition of several new headings, as well as expansion of some earlier ones and generally the change of format to which I will refer below.

First, however, I would issue a warning. My local newsagent sells paperback books purporting to tell the layman how to perform various tasks from buying and selling houses to writing his own will. The do-it-yourself movement is rampant—but this book forms no part of it!

It has been assumed that users of this book will be practising, qualified lawyers who have access to the various well-known authorities on the branches of the law covered and who will use the checklists for their intended purpose, namely, as a useful tool for monitoring the progress of the file and having available an immediate indication, at a glance, of the stage reached and the steps remaining to be performed. The checklists themselves should never be used as a statement of the law or of correct practice since each matter and each client must be dealt with individually. The modest hope is that the book will be an aide-mémoire to busy practitioners to obviate the need to read laboriously through a correspondence file and other paperwork to ascertain the current position. To this end, many detailed points of law intentionally have not been referred to, thus, it is hoped, maintaining forms of manageable length.

It is anticipated that copies will be made of the pages in order that the checklists can be attached to the inside cover of a file. To make this simpler, the present edition has been bound so as to facilitate photocopying of pages. On the photocopies taken, no doubt users will wish to make their own notes pertinent to the particular matter.

Among the new forms are included checklists dealing with Employment Law, Taxation, Business Tenancies, and Sales and Purchases of Private Companies and Businesses, to reflect the growth of this type of work. At the other end of the scale, it was felt that notes upon administering oaths and witnessing statutory declarations could be of practical assistance. Additionally, the opportunity has been taken to expand such heads as Powers of Attorney, and Liquor Licensing. Further, it is hoped that the

forms containing matters for consideration and for taking instructions will help, for example, the newly qualified as well as the more experienced.

Limited space prevents me from listing all those whose guidance and encouragement in the preparation of this edition has been invaluable. Nevertheless, I should like to place on record the gratitude due to the author of the earlier editions, Mr Shuttleworth. This edition is, of course, completely different from the earlier books in content as well as format. This is a result, first, of the fact that the work comprises a collection of checklists provided by a team of contributors and, secondly, of consideration given to the means by which the book can be made easier to use. I think that the continued loyalty of established users coupled with the interest shown by prospective ones constitute evidence that the idea of such a book was definitely a good one. I know that many of the contributors, whose names are listed on another page, have put in hours of their own time and I am grateful to them all for their cheerfulness and co-operation.

Michael W. Hartley

# List of Contributors

As indicated elsewhere, this edition is the result of team work. Although, the majority of contributions are from partners and colleagues within Speechly Bircham, I would like to thank David R. Stanton, Barrister at Law, for his contributions of the checklists in respect of Road Traffic Acts and Criminal Proceedings.

## A Transactions relating to land

Michael W. Hartley, Brian M. Shacklady, Martin F. Steer for forms relating to non-contentious matters

Vivien M. Huleatt-James and Bradley D. Brown for forms relating to business tenancies

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N Criminal proceedings

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O Court of Protection

Mark J. Musgrave

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# 1 Sale of Land

## 1.1 Initial instructions

**Client** \_\_\_\_\_ **Date** \_\_\_\_\_

1 Property

2 Vendor's full name

Address

Telephone

(Home)

(Work)

3 Purchaser's name

Solicitors

Solicitors' address

4 Sale price

Additional items to be sold and prices

5 Estate agents' name

Negotiator's name

Address

Preliminary deposit