

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

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
2.	<b>Professional ethics</b>	<p>Experience in applying major ethical principles in real cases:</p> <p><b>(a) Fiduciary duty</b></p> <p><input type="checkbox"/> <b>T</b> <input type="checkbox"/> <b>P</b> • Act in client’s best interests with honesty, openness and fairness</p> <p><input type="checkbox"/> <b>T</b> <input type="checkbox"/> <b>P</b> • Handle conflict check (between solicitor and client and between clients)</p> <p><input type="checkbox"/> <b>T</b> <input type="checkbox"/> <b>P</b> • Identify any potential or actual conflict</p> <p><input type="checkbox"/> <b>T</b> <input type="checkbox"/> <b>P</b> • Take appropriate action to deal with any actual conflict or to avoid any potential conflict arising in the future</p> <p><b>(b) Confidentiality</b></p> <p><input type="checkbox"/> <b>T</b> <input type="checkbox"/> <b>P</b> • Recognise and comply with the duty of confidentiality owed to clients</p> <p><b>(c) Professional undertakings</b></p> <p><input type="checkbox"/> <b>T</b> <input type="checkbox"/> <b>P</b> • Draft professional undertakings taking into account the effect and the responsibilities embodied in such undertakings</p> <p><input type="checkbox"/> <b>T</b> <input type="checkbox"/> <b>P</b> • 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>	

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
2.	Professional ethics (cont'd)	<p>(d) Professional fees</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Draft written advice on cost estimates / availability of legal aid</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Draft bills of costs (interim and final)</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Draft written records of agreed fees</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Follow up on the settlement of the bills / agreed fees</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Understand the office procedures on issue of receipts and payment of fees into office / client accounts / third parties</p> <p><input type="checkbox"/> T <input type="checkbox"/> P • Understand the prohibition against profit sharing with unqualified persons</p>		

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

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
4.	<b>Practice support skills</b>	<p data-bbox="428 326 1140 423"> <span style="border: 1px solid black; padding: 2px;">T</span> <span style="border: 1px solid black; padding: 2px;">P</span> (a) Run small transactions under close supervision and gain experience in case management         </p> <p data-bbox="428 500 1188 565"> <span style="border: 1px solid black; padding: 2px;">T</span> <span style="border: 1px solid black; padding: 2px;">P</span> (b) Work on larger transactions as a member of a team and gain experience in team work         </p>	<p data-bbox="1220 293 1346 321">Ability to</p> <p data-bbox="1220 329 1759 1450">           (i) manage personal workload efficiently;            (ii) work effectively as a team member;            (iii) use information technology competently to improve work efficiency;            (iv) keep appropriate file records in an orderly manner and render timely bills;            (v) keep clients fully informed of all developments in their matter in a professional manner;            (vi) recognise any signs of client dissatisfaction and act appropriately;            (vii) conduct each matter in a way that minimises any risk to client and law firm;            (viii) identify clients' problems and objectives and generate possible solutions for evaluation based on merits and risks;            (ix) plan and review progress of case / transaction and bring matters to a timely and client-satisfactory conclusion.         </p>	

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



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

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

	Area	Briefing / Training / Practical Experience	Target Outcome	Duration (with dates)
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	

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10.	Practice area - Banking	<p>(a) Banking</p> <ul style="list-style-type: none"> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <div> <ul style="list-style-type: none"> <li>• Draft simple loan agreements, guarantees, security documents, related board minutes, director’s certificates and other ancillary documents</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <div> <ul style="list-style-type: none"> <li>• 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</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <div> <ul style="list-style-type: none"> <li>• Assist in Debt Capital Markets transactions, including drafting, reviewing and commenting on offering materials, placement / subscription agreements and ancillary documents</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <div> <ul style="list-style-type: none"> <li>• Assist in preparing debt sell down and transfer documentation including assignments and sub-participations</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <div> <ul style="list-style-type: none"> <li>• Assist in reviewing derivatives documentation (including swap documentation) and be familiar with market standard documentation (ISDA)</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <div> <ul style="list-style-type: none"> <li>• Draft / review legal opinions and liaise with foreign Counsel in relation to legal opinions on foreign law</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <div> <ul style="list-style-type: none"> <li>• Draft / review and collate conditions precedent documents and liaise with various parties throughout the process of fulfilling conditions precedent requirements</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <div> <ul style="list-style-type: none"> <li>• Draft / review and comment on commitment letters, fee letters, term sheets and engagement letters</li> </ul> </div> </div> </li> <li> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 10px;">P</div> <div> <ul style="list-style-type: none"> <li>• Be familiar with loan market standard form documentation (e.g. APLMA and LMA standard form documents) from both lender and borrower perspective</li> </ul> </div> </div> </li> </ul>	

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10.	<b>Practice area – Banking</b> (cont'd)	<table border="0"> <tr> <td data-bbox="415 305 478 354">T</td> <td data-bbox="489 305 552 354">P</td> <td data-bbox="659 293 1734 354">• Arrange for relevant company, court and insolvency searches against companies and review search results</td> </tr> <tr> <td data-bbox="415 394 478 443">T</td> <td data-bbox="489 394 552 443">P</td> <td data-bbox="659 394 1289 427">• Review constitutional documents of companies</td> </tr> <tr> <td data-bbox="415 459 478 508">T</td> <td data-bbox="489 459 552 508">P</td> <td data-bbox="659 459 1251 492">• Prepare Particulars of Charges and Releases</td> </tr> <tr> <td data-bbox="415 532 478 581">T</td> <td data-bbox="489 532 552 581">P</td> <td data-bbox="659 532 1623 565">• Arrange for filing and registration of documents at the Companies Registry</td> </tr> <tr> <td data-bbox="415 597 478 646">T</td> <td data-bbox="489 597 552 646">P</td> <td data-bbox="659 597 1707 667">• Be familiar with issues such as security principles, insolvency rules, company law principles, banking regulations, execution formalities, etc.</td> </tr> <tr> <td data-bbox="415 703 478 751">T</td> <td data-bbox="489 703 552 751">P</td> <td data-bbox="659 703 1644 735">• Prepare know-how and articles on new regulations and market developments</td> </tr> <tr> <td data-bbox="415 768 478 816">T</td> <td data-bbox="489 768 552 816">P</td> <td data-bbox="659 768 1031 800">• Prepare transaction bibles</td> </tr> </table>	T	P	• Arrange for relevant company, court and insolvency searches against companies and review search results	T	P	• Review constitutional documents of companies	T	P	• Prepare Particulars of Charges and Releases	T	P	• Arrange for filing and registration of documents at the Companies Registry	T	P	• Be familiar with issues such as security principles, insolvency rules, company law principles, banking regulations, execution formalities, etc.	T	P	• Prepare know-how and articles on new regulations and market developments	T	P	• Prepare transaction bibles	
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10.	<b>Practice area – Civil litigation</b>	(b) Civil litigation																						
		<table border="0"> <tr> <td data-bbox="415 1455 478 1503">T</td> <td data-bbox="489 1455 552 1503">P</td> <td data-bbox="659 1463 1770 1502"></td> </tr> </table>	T	P																				
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		<ul style="list-style-type: none"> <li>• Attend client meetings / report to and advise client / take instructions from client</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Draft <ul style="list-style-type: none"> <li>- Attendance notes</li> <li>- statements of case / memorials</li> <li>- affirmation (for summary judgment or setting aside default judgment)</li> <li>- lists of document / disclosure statements</li> <li>- requests for further information</li> <li>- summonses</li> <li>- witness statements</li> <li>- expert reports</li> <li>- instructions to Counsel</li> <li>- dispute resolution clauses</li> <li>- costs schedules</li> </ul> </li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Prepare / consider documents for disclosure and prepare disclosure list</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Inspect other party's documents</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Consider issues of privilege</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Instruct Counsel / attend conference with Counsel</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Research and analyse points of law and issues of business importance</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Attend case management conference / interim hearing</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Meet / interview witnesses</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Meet / instruct experts</li> </ul>	
10.	<b>Practice area – Civil litigation</b>	<div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> </div> <ul style="list-style-type: none"> <li>• Observe / conduct settlement negotiations</li> </ul>	

	Area	Briefing / Training / Practical Experience	Duration (with dates)									
	(cont'd)	<table border="0"> <tr> <td data-bbox="415 331 478 380">T</td> <td data-bbox="491 331 554 380">P</td> <td data-bbox="659 331 1058 363">• Conduct / observe advocacy</td> </tr> <tr> <td data-bbox="415 396 478 444">T</td> <td data-bbox="491 396 554 444">P</td> <td data-bbox="659 396 1058 428">• Prepare / agree trial bundles</td> </tr> <tr> <td data-bbox="415 461 478 509">T</td> <td data-bbox="491 461 554 509">P</td> <td data-bbox="659 461 1087 493">• Attend court / tribunal hearing</td> </tr> </table>	T	P	• Conduct / observe advocacy	T	P	• Prepare / agree trial bundles	T	P	• Attend court / tribunal hearing	
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10.	Practice area - Commercial	(c) Commercial										

T	P
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	Area	Briefing / Training / Practical Experience	Duration (with dates)
		<ul style="list-style-type: none"> <li>• Assist in taking instructions from client and researching and selecting a commercial structure that will achieve the client's objectives</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-left: 10px;">P</div> </div> <ul style="list-style-type: none"> <li>• Assist in drafting related documents required to set up the commercial structures which may include: <ul style="list-style-type: none"> <li>- simple sale and purchase agreement for a business and completion documents and attend completion</li> <li>- simple sale and purchase agreement for goods</li> <li>- simple joint venture agreements</li> <li>- simple powers of attorney</li> <li>- Simple franchise agreements</li> </ul> </li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-left: 10px;">P</div> </div> <ul style="list-style-type: none"> <li>• Draft all related documents required to set up the commercial structures</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-left: 10px;">P</div> </div> <ul style="list-style-type: none"> <li>• Draft simple employment contracts</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-left: 10px;">P</div> </div> <ul style="list-style-type: none"> <li>• Attend to completion</li> </ul> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-left: 10px;">P</div> </div> <ul style="list-style-type: none"> <li>• Assist in keeping clients informed of any continuing obligations in relation to the commercial structure</li> </ul>	
10.	Practice area - Company	(d) Company	

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P



	Area	Briefing / Training / Practical Experience	Duration (with dates)
		<ul style="list-style-type: none"> <li>• Incorporate a company in Hong Kong including drafting memorandum and articles of association and all post-incorporation documents.</li> <li style="margin-left: 20px;"><input type="checkbox"/> P</li> <li>• Amend Memorandum and Articles of Association and review the same for particular transactions</li> <li style="margin-left: 20px;"><input type="checkbox"/> T   <input type="checkbox"/> P</li> <li>• Register a non-Hong Kong company under Part XI of the Companies Ordinance</li> <li style="margin-left: 20px;"><input type="checkbox"/> T   <input type="checkbox"/> P</li> <li>• Form a general partnership</li> <li style="margin-left: 20px;"><input type="checkbox"/> T   <input type="checkbox"/> P</li> <li>• 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)</li> <li style="margin-left: 20px;"><input type="checkbox"/> T   <input type="checkbox"/> P</li> <li>• Draft simple sale and purchase agreement for shares of a private limited company</li> <li style="margin-left: 20px;"><input type="checkbox"/> T   <input type="checkbox"/> P</li> <li>• Assist in the due diligence exercise</li> <li style="margin-left: 20px;"><input type="checkbox"/> T   <input type="checkbox"/> P</li> <li>• Prepare completion documents</li> <li style="margin-left: 20px;"><input type="checkbox"/> T   <input type="checkbox"/> P</li> <li>• Attend completion and attend to stamping of share transfer and related contract notes</li> <li style="margin-left: 20px;"><input type="checkbox"/> T   <input type="checkbox"/> P</li> <li>• Assist in the giving of advice on the legal obligations of corporations and their officers</li> <li style="margin-left: 20px;"><input type="checkbox"/> T   <input type="checkbox"/> P</li> <li>• Assist in identifying generally the stamp duty implications of corporate transactions</li> <li style="margin-left: 20px;"><input type="checkbox"/> T   <input type="checkbox"/> P</li> <li>• Draft simple shareholders' agreement</li> </ul>	
10.	<b>Practice area – Criminal litigation</b>	(e) Criminal litigation	
		<input type="checkbox"/> T <input type="checkbox"/> P  <input type="checkbox"/> <input type="checkbox"/>	

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

	Area	Briefing / Training / Practical Experience	Duration (with dates)
	(cont'd)	<p>and the evidence against the client available to the investigation authorities</p> <ul style="list-style-type: none"> <li>• Take proofs of instructions and obtain comments on prosecution evidence</li> <li>• Conduct site visits</li> <li>• Preserve evidence and take witness statements</li> <li>• Attend court proceedings and observe the role of solicitors at court</li> <li>• Prepare Instructions to Counsel</li> <li>• Attend and observe the role of solicitors at conferences with Counsel</li> <li>• Prepare for trial and mitigation</li> <li>• Assist in assessing a case after the close of the Prosecution's case and in giving advice to client</li> <li>• Assist in giving advice on grounds of appeal against conviction and sentence</li> <li>• Keep accurate attendance notes / time records</li> <li>• Draw up bills of costs</li> <li>• Follow up on the recovery of costs</li> </ul>	
10.	<b>Practice area - Family</b>	(f) Family	

T  P

	Area	Briefing / Training / Practical Experience	Duration (with dates)
		<ul style="list-style-type: none"> <li>• Attend clients for instructions in family matters of dispute, divorce, ancillary relief and custody, and access</li> <li>• Be aware of <ul style="list-style-type: none"> <li>- relevant practice directions</li> <li>- major ordinances and rules for matrimonial practice</li> <li>- FDR process</li> <li>- mediation process</li> </ul> </li> <li>• Draft <ul style="list-style-type: none"> <li>- Petition and Answer and all related statutory documents</li> <li>- all forms of Notices</li> <li>- Affidavits / Affirmations</li> <li>- Form E</li> <li>- Summonses / consent summonses</li> <li>- Basic Orders</li> <li>- letters to parties and own clients</li> <li>- instructions to Counsel</li> </ul> </li> <li>• Prepare <ul style="list-style-type: none"> <li>- bundles for hearing</li> <li>- the First Appointment Bundle including preparing the Estimate of Costs.</li> <li>- meeting notes</li> <li>- hearings</li> </ul> </li> <li>• Handle <ul style="list-style-type: none"> <li>- clients</li> <li>- Counsel</li> <li>- accounts</li> <li>- documentary evidence</li> </ul> </li> </ul>	
10.	Practice area - Insolvency	(g) Insolvency	

T P

	Area	Briefing / Training / Practical Experience	Duration (with dates)
		<ul style="list-style-type: none"> <li>• Draft <ul style="list-style-type: none"> <li>- statutory demand</li> <li>- Winding up and Bankruptcy Petitions</li> </ul> </li>   <li> <div style="display: inline-block; vertical-align: middle; margin-right: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">T</div> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">P</div> </div> <ul style="list-style-type: none"> <li>• Obtain Certificate of Compliance from Master</li> </ul> </li>   <li> <div style="display: inline-block; vertical-align: middle; margin-right: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">T</div> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">P</div> </div> <ul style="list-style-type: none"> <li>• Attend <ul style="list-style-type: none"> <li>- the first hearing of the Petition</li> <li>- the creditors' meeting</li> <li>- the election of Committee of Inspection</li> <li>- adjudication of Proof and file Objection if necessary</li> </ul> </li> </ul> </li>   <li> <div style="display: inline-block; vertical-align: middle; margin-right: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">T</div> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">P</div> </div> <ul style="list-style-type: none"> <li>• Prepare Proof of Debt</li> </ul> </li>   <li> <div style="display: inline-block; vertical-align: middle; margin-right: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">T</div> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">P</div> </div> <ul style="list-style-type: none"> <li>• Assist in the paper work for <ul style="list-style-type: none"> <li>- the appointment of Provisional Liquidators</li> <li>- the formation and administration of scheme of arrangement</li> </ul> </li> </ul> </li>   <li> <div style="display: inline-block; vertical-align: middle; margin-right: 10px;"> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">T</div> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">P</div> </div> <ul style="list-style-type: none"> <li>• Understand the present arrangement of the Official Receivers' Office to appoint outside insolvency practitioners as receivers / liquidators</li> </ul> </li> </ul>	
10.	<b>Practice area – Intellectual</b>	(h) Intellectual property	

	Area	Briefing / Training / Practical Experience	Duration (with dates)																																				
	property	<p style="text-align: center;"><u>Contentious</u></p> <table border="0"> <tr> <td style="border: 1px solid black; text-align: center; width: 30px;">T</td> <td style="border: 1px solid black; text-align: center; width: 30px;">P</td> <td style="padding-left: 20px;">• Conduct and/or arrange for company, business, domain name and IP registration searches against infringers</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Search the Internet for evidence of infringement and/or contact details of potential infringers</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Draft warning and chasing letters to infringers</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Negotiate with infringers with a view to obtaining an undertaking and compensation</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Prepare letters of undertaking and attend infringers to execute letters of undertaking</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Report cases to Customs and attend examination of counterfeit merchandise seized by Customs</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• 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 style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Draft instructions to investigators</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Attend Trade Marks Registry hearings</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Draft Writ with a generally endorsed Claim</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Prepare Timetabling Questionnaires</td> </tr> <tr> <td style="border: 1px solid black; text-align: center;">T</td> <td style="border: 1px solid black; text-align: center;">P</td> <td style="padding-left: 20px;">• Advise client on the possibility of mediation / other ADR methods</td> </tr> </table>	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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	Area	Briefing / Training / Practical Experience	Duration (with dates)
		<ul style="list-style-type: none"> <li>• Draft and approve <ul style="list-style-type: none"> <li>- agreements for Sale and Purchase</li> <li>- assignments</li> <li>- tenancy agreement</li> </ul> </li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Attend to stamping and registration</li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Approve title</li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Assist in execution</li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Attend to filing and registration of documents at Companies Registry and Land Registry</li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Peruse Memorandum and Articles of Association of companies and prepare Board and Shareholders' Resolution</li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Prepare Mortgages, Equitable Mortgages, Guarantees and reporting letters to banks and engaging in completion procedures</li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Assist in loan transactions</li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Prepare Releases</li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Manage general file maintenance</li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Assist in dealing with clients</li>   <li><input type="checkbox"/> T <input type="checkbox"/> P • Ensure compliance with Law Society's rules, regulations and guidelines including those on Anti-Money Laundering</li> </ul>	
10.	<b>Practice area –</b>	(j) Trusts, wills and probate	

	Area	Briefing / Training / Practical Experience	Duration (with dates)												
	Trusts, wills and probate	<table border="0"> <tr> <td data-bbox="415 334 474 386">T</td> <td data-bbox="489 334 548 386">P</td> <td data-bbox="659 326 1759 358">• Familiarise with the laws of Wills, Wills Drafting and Testate and Intestate Succession</td> </tr> <tr> <td data-bbox="415 407 474 459">T</td> <td data-bbox="489 407 548 459">P</td> <td data-bbox="659 396 1745 461">• Understand the procedures relating to obtaining estate duty clearance, application for grant of representation and administration of estate</td> </tr> <tr> <td data-bbox="415 496 474 548">T</td> <td data-bbox="489 496 548 548">P</td> <td data-bbox="659 498 1654 563">• Ensure compliance with the Law Society rules and regulations and guidelines including those on Anti-Money Laundering</td> </tr> <tr> <td data-bbox="415 610 474 662">T</td> <td data-bbox="489 610 548 662">P</td> <td data-bbox="659 602 1749 1078"> <ul style="list-style-type: none"> <li>• Draft Wills <ul style="list-style-type: none"> <li>- Understand client's instructions and identify client's goals</li> <li>- Identify and analyze relevant legal and factual issues</li> <li>- Advise clients on matters to consider on Wills drafting before taking instructions on Wills drafting</li> <li>- Critically use precedents to facilitate drafting</li> <li>- Explain the contents of the Will to clients</li> <li>- Attend to attestation of Will</li> </ul> </li> </ul> </td> </tr> </table>	T	P	• Familiarise with the laws of Wills, Wills Drafting and Testate and Intestate Succession	T	P	• Understand the procedures relating to obtaining estate duty clearance, application for grant of representation and administration of estate	T	P	• Ensure compliance with the Law Society rules and regulations and guidelines including those on Anti-Money Laundering	T	P	<ul style="list-style-type: none"> <li>• Draft Wills <ul style="list-style-type: none"> <li>- Understand client's instructions and identify client's goals</li> <li>- Identify and analyze relevant legal and factual issues</li> <li>- Advise clients on matters to consider on Wills drafting before taking instructions on Wills drafting</li> <li>- Critically use precedents to facilitate drafting</li> <li>- Explain the contents of the Will to clients</li> <li>- Attend to attestation of Will</li> </ul> </li> </ul>	
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10.	Practice area –	<table border="0"> <tr> <td data-bbox="415 1442 474 1494">T</td> <td data-bbox="489 1442 548 1494">P</td> <td data-bbox="659 1430 1633 1463">• Obtain estate duty clearance for persons who died before 11 February 2006:</td> </tr> </table>	T	P	• Obtain estate duty clearance for persons who died before 11 February 2006:										
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	Area	Briefing / Training / Practical Experience	Duration (with dates)
	Trusts, wills and probate (cont'd)	<ul style="list-style-type: none"> <li>- Understand key charging and exemption provisions in the Estate Duty Ordinance and case laws</li> <li>- Understand the significance of compliance under the Estate Duty Ordinance to applications for grant of representation</li> <li>- Elicit relevant facts and information for the purpose of obtaining estate duty clearance for the estate</li> <li>- Complete Estate Duty Forms in order to obtain clearance</li> <li>- Attend with representatives of the Home Affairs Department for the opening of Safe Deposit Box and inventory taking</li> </ul> <div style="display: flex; align-items: center; margin: 10px 0;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <ul style="list-style-type: none"> <li>• Obtain Grants of Representation to a Deceased estate including: <ul style="list-style-type: none"> <li>- Understand formalities and procedures to be followed in obtaining a Grant of Representation</li> <li>- Prepare the Schedule of Properties</li> <li>- Draft the necessary affirmations / affidavits to obtain a Grant</li> <li>- Identify the supporting documents required for the application</li> </ul> </li> </ul> </div>	

	Area	Briefing / Training / Practical Experience	Duration (with dates)
10.	Practice area – Trusts, wills and probate (cont'd)	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 20px;"> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">P</div> </div> <ul style="list-style-type: none"> <li>• Practise the Administration of Estates               <ul style="list-style-type: none"> <li>- Identify and apply legal principles in explaining to clients how an estate is distributed</li> <li>- Collect, secure and manage assets</li> <li>- Pay debts and other liabilities</li> <li>- Distribute the estate to the beneficiaries</li> </ul> </li> </ul> </div>	
11.	Practice area – International law	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 20px;"> <div style="margin-bottom: 10px;">(k) International law (Private and Public International Law)</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">P</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">P</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">P</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">P</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-bottom: 10px;">P</div> </div> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Assist in the drafting, interpreting and advising on and enforcing international treaties and conventions.</li> <li>• Assist in bringing or defending claims on international disputes and international law violations such as maritime and territorial and boundary disputes.</li> <li>• Assist in advising on international criminal law and international criminal matters.</li> <li>• Attend hearings in international courts or tribunals or hearings on public international law issues arising in domestic courts, or investment treaty arbitrations.</li> </ul> </div>	

	Area	Briefing / Training / Practical Experience	Duration (with dates)
		<div style="display: flex; flex-direction: column; gap: 10px;"> <div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <ul style="list-style-type: none"> <li>• Liaise with sovereign governments, multinational corporations, international non-governmental organizations such as the United Nations, the European Union and the World Trade Organization.</li> </ul> </div> <div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">T</div> <div style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">P</div> <ul style="list-style-type: none"> <li>• 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.</li> </ul> </div> </div>	

30 April 2021