

**Group Legal Services Association  
Solo, Small Firm, and General Practice Section  
2014 Annual Conference  
May 1-3, 2014, Las Vegas, Nevada**

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**How Group Legal Plans Can Help  
Underemployed Lawyers**

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**Thursday, May 1**

**4:00 pm - 5:00 pm**

**Presenter: Rinky Parwani, Parwani Law, PA**



## **Rinky Parwani**

Ms. Parwani has a solo practice in Tampa, Florida. She was the winner of the 2010 Brandon Small Business of the Year Award for Minority and Women Owned Businesses. She serves as the ABA General and Solo Small Firm Diversity Fellow. She is admitted to the bars in Florida, Texas, California and Iowa, as well as the US Supreme Court, Ninth Circuit, Eleventh Circuit and four US District Courts. She is a Fellow of the Life Management Institute, has her CMA from the Institute of Certified Management Accountants. She received her BS with double majors in Accounting and Corporate Finance from Drake University, her MBA from Drake and her JD from the University of Minnesota.

# LEGAL PLAN SERVICES

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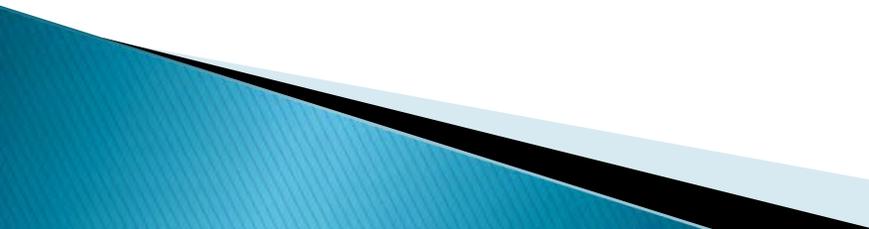
# Brief Overview of Legal Plan Services

- ▶ What are legal plan services?
- ▶ How is it defined? Insurance v. Plan?
- ▶ How does it benefit the client?
- ▶ How does it benefit the law firm?



# Setting the Appointment

Many attorneys drop the ball when setting the appointment. This is the most important contact with the client. You have heard of first impressions, this is it. This is where you make or break the case. Considerations to take in mind to meet your ethical obligations are to always check conflicts and also verify legal coverage. Asking the client about the other parties involved and also verifying the coverage will help the consultation go smoothly once the client arrives at your office.



# Initial Consultations

The initial consultation is the first time the client is meeting with an attorney. First impressions are vital in a law practice. It is very important that a client is treated with the utmost courtesy and care whether a full price client or a legal plan client. The level of customer service cannot be any different.



# Retainer Agreement

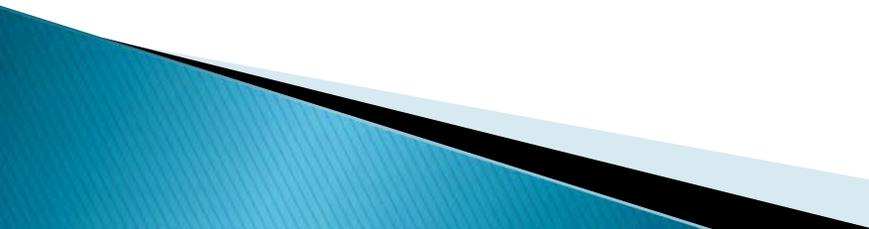
The retainer agreements for unbundled and legal plan clients are very important. The details of the agreement can vary by the type of matter. A good retainer agreement is not a substitution for good client communication.

When dealing with unbundled legal services, it is very important to discuss the retainer amount at the initial meeting and explain what is covered and not covered during an initial consultation.



# Communicating With Your Client

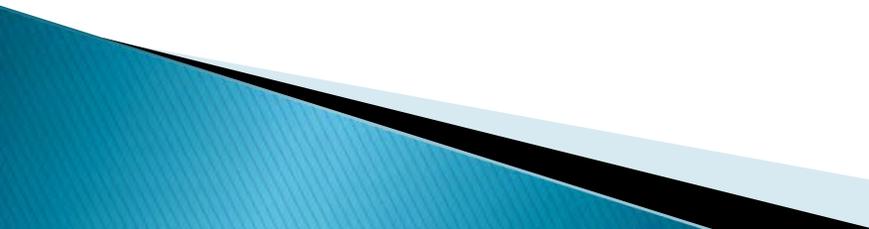
Whether by email or regular mail, it is very important that client understand what it is you are doing for them. One of the best ways to have a happy client is to send them every piece of paper in their case and advise them if any action is needed on their part. Also provide them with a deadline for providing you with information. Make sure you are following what you said you would in your unbundled agreement. Point out issues and costs that are not covered by the unbundled agreement.



# Concluding the Engagement

If you providing a legal plan service, the withdrawal must also carefully be laid out in your retainer as to the conclusion of services. Please make sure you contain withdrawal provisions in your retainer agreement.

Be sure to use an appropriate closing letter. Advise the client when you plan to destroy the file. Review your bar rules for requirements as well as specific practice requirements.



# Tricks to Advise the Client

- ▶ The Emotion Rollercoaster
- ▶ Providing Options Not Ultimatums
- ▶ Financial Constraints
- ▶ Agreements and Ethical Traps

