Office Policies and Procedures Manual
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Legal letters

Introduction
Before writing a legal letter you should familiarise yourself with your firm’s letter writing standards. These standards may appear in your office’s Policies and Procedures manual. Check your own office for the location of these standards. If the standards have not been documented then you should obtain copies of previous letters, as these will reflect your firm’s standards.

Some firms have templates that can be used to create legal letters. Templates will reflect the firm’s standards and help you structure your letter correctly.

For further clarification on legal correspondence you should consult the Legal Secretary’s Handbook.

Legal letters normally follow the same basic rules as other business letters, but there are a number of issues about writing legal letters that you should be familiar with.
Writing a legal letter

Introduction
When you are creating a legal letter you will need to consider the following points:

- **Without prejudice**
- **Headings**
- **Matter numbers**
- **Document identification**
- **DX Number**
- **Date**
- **Addressee**
- **Envelopes**

These points will now be discussed in further detail.

Writing the letter

**Without prejudice**
You will often see the words “Without Prejudice” on a legal letter. These words are used where the writer intends that the letter should not be used as evidence. “Without Prejudice” appears above the main body of text. If the lawyer has specifically asked for these words to be included then you must ensure that you have done so.

**Headings**
Headings are used in all legal letters except for personal letters. If you are unsure whether a heading should be used then ask the lawyer for whom you are preparing the letter. If there are two parties involved then both their names should appear in the heading. Your firm’s client should always appear first.

Examples of headings:

Conveyancing
RE: WONG PURCHASE FROM BROWN
PROPERTY: 32 CREEK ROAD, SOUTH YARRA

The word “from” is used if your firm is acting for the purchaser. If your firm is acting for the vendor then the word “to” is used.

Probate
RE: ESTATE OF THE LATE MARIA DE ANGELIS

Study a number of letters that your firm has created to ensure you understand the various headings you will need to use.
Matter numbers
As with other business letters you should always include your reference number on legal correspondence. In a legal office the reference number will be the matter number. The matter number is the unique number given to each file. The matter number allows all related documents to be filed together.

Remember that you should also include the reference number of the firm, company or authority to which the letter is being sent.

Document identification
Most letters will include a document identification number. Normally a document identification number appears at the bottom of the page. A document identification is used to easily identify who created a document and when. Each firm will have its own way of creating document identification numbers. Make sure that you understand your firm’s system for creating document identification numbers.

DX number
If your firm is a member of the Australian Document Exchange, also known as DX or Ausdoc, then you should always include the firm’s DX number in your correspondence.

The DX system is an alternative to the postal system and courier companies. For further information on the document exchange system you should consult the Legal Secretary’s Handbook.

Date
All business correspondence should include the date. In legal correspondence the date can prove to be crucial, for example, where contracts have specific time limits.

Addressee
Exercise care when addressing legal correspondence. If an incorrect address is used then the item could be delivered to the wrong building. Using the wrong name could mean that someone else accidentally opens the document. This can be avoided by the use of initials and the appropriate courtesy titles.

Envelopes
If a letter is being sent to a client care of a firm then the envelope should have “PRIVATE & CONFIDENTIAL” printed on it.

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Guidelines for letters in this office

When you are required to create a letter you should use the Centonza Gleitman Luong & Associates’ template. When using the template you should:

- Enter our reference number (Our ref). This should be the same as the matter number.
- Enter the recipient’s reference number (Your ref) if one exists.
- Enter the date.
- Enter the name and address of the addressee (the inside address).
- Enter the subject (subject line).
- Enter the name and title of the signatory (the signature line).
- Select the appropriate option for enclosures.
- Enter the file number (document identification number).

Ensure that the information you have entered is correct and that the text is appropriately positioned on the page.

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How to complete the daily timesheet

You are required to accurately complete timesheets, detailing the number of hours spent on different business activities each day. The information is used for client billing and to help plan future workloads.

- For each timesheet, you should:
- Enter your name and the date.
- Enter the client’s name.
- Enter the matter number.
- Enter the time you started working on the task.
- Enter the time you stopped working on the task.
- Enter the number of 6 minute units spent on the task.
- Refer to the task code sheet for the appropriate code.
- Enter an appropriate description of the task. For example, “creating a letter from a hand written note”.
- Ensure that the information is correct.
- Save the completed timesheet to a disk.

The completed timesheets should be emailed to your Legal Support Manager.

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Entering an event in a lawyer’s diary

To record an event in a lawyer’s diary you must always include the following details if appropriate:

♦ A short description of the event
♦ The matter number
♦ The name of the client
♦ The address of the event.