

Unbundled Family Legal Services – Where the Rubber Hits the Road #2

Family Law Limited Scope Services Project / OBA Supporting Partner



In-Person

Date: Thursday, February 20, 2020| 3:00 pm to 7:00 pm

Location: Program:  
Peel Family Mediation Services, Suite 405 (2nd floor)  
7700 Hurontario, Brampton, ON L6Y 4M3  
Across from the A. Grenville and William Courthouse (next to Longos)  
Entry via main building next to Oxford Learning

Social:  
Fionn MacCool’s  
11 Ray Lawson Blvd, Brampton ON L6Y 5L8

Agenda: 3:00 pm Registration  
3:20 pm Program Begins  
5:30 pm Program Concludes  
5:30 pm – 7:00 pm Social



This program contains:  
2h 0m of Professionalism Content

The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Ontario.

Limited scope services and legal coaching are emerging models of service provision aimed at helping self-represented litigants to better navigate their family law disputes without full representation. This program will provide you with the essential training, resources and best practices you need to be comfortable when providing limited scope services to family law clients, and to join the Project Directory. Come and see what it is all about!

Program Chairs: Tami Moscoe, Office of the Chief Justice, Superior Court of Justice  
Frankie Wood, Wood Gold LLP, OBA Family Law Section Vice-Chair

3:00 pm Registration and Refreshments

3:20 pm Welcome and Opening Remarks  
Frankie Wood, Wood Gold LLP

3:25 pm Introduction to Unbundled Services and the FLLSS Project  
Tami Moscoe, Office of the Chief Justice, Superior Court of Justice

- What are unbundled legal services?
- About the FLLSS Project

3:40 pm Project Website and the Lawyer Directory  
Helena Birt, Project Senior Program Director

- Website quick tour
- Resource materials and precedents
- Why you should join the Directory, admission requirements and how to apply

3:55 pm Best Practices and Managing Risk Relating to Unbundled Services and Coaching  
Brian Burke, Epstein Cole LLP  
Lisa Eisen, Family Law: A La Carte  
Frankie Wood, Wood Gold LLP

- Identifying appropriate and inappropriate clients for limited scope retainers
- Review of precedent retainers

- Best practices in providing unbundled legal services including:
  - Managing client expectations
  - Defining the scope of services to be provided
  - Acting in accordance with and only with the retainer, ending services at completion
  - Communications with clients, opposing counsel and the Court
  - Other ways to identify and minimize risk

4:40 pm Coaching as a Distinct Model of Unbundled Services  
Lisa Eisen, Family Law: A La Carte

- How coaching differs from limited scope services
- Key features and benefits of legal coaching
- The ideal coaching client
- Forms of coaching

5:05 pm Introduction to Summary Legal Counsel Family Law Pilots (Toronto and Barrie)  
Tami Moscoe, Office of the Chief Justice, Superior Court of Justice

- Service delivery model and bundle
- Retainers, conflict checks and onsite payments

5:15 pm Questions and Concluding Remarks

5:30 pm Social

	CBA Member	CBA Student Member	Non-Member
Live (Includes Social)	Complimentary	Complimentary	Complimentary
Social Only	Complimentary	Complimentary	Complimentary

Choose an item. [www.oba.org/pd](http://www.oba.org/pd)  
Questions? [pd@oba.org](mailto:pd@oba.org)