

10 TIPS TO AVOID A CLAIM

OAMIC was formed by Oklahoma lawyers in 1980. Now a mutual company, OAMIC is policyholder-owned and still the only local provider of lawyers professional liability insurance. After more than four decades in the Oklahoma legal community, we've seen, heard and learned a lot. Below are some of the biggest issues we see Oklahoma lawyers facing.

- **Missing deadlines** | Although the rest of these aren't necessarily in order of importance, there's a reason this one is the first on the list. Calendar-related issues account for one third of all claims both in Oklahoma and nationwide. Use a dual-calendar system - every time.
- **Ineffective client screening** | Be selective and never ignore red flags. If a potential client has hired and fired several lawyers, ask enough questions to know why.
- **Poor client relations** | Manage client expectations, starting with an engagement letter, and always respond to clients in a timely manner.
- **Inadequate documentation** | Be fastidious with your record keeping, stay organized and always get it in writing.
- **Inadequate research and experience** | Dabbling in areas of law you don't normally practice can be dangerous. Don't get in a hurry, do your homework and know your limitations.
- **Conflicts of interest** | Establish and maintain a system to evaluate all new matters. Develop protocols for onboarding new lawyers to ensure no accidental overlap in matters.
- **Inappropriate involvement in client interest** | Do not be a stakeholder in your clients' businesses and utilize your conflict-of-interest system to avoid even accidental involvement.
- **Suing for client fees** | Billing as you go will avoid one single, large bill for an entire matter at the end. This helps manage cost and payment expectations for both you and your client.
- **Stress and substance abuse** | The practice of law is one of the most stressful professions. Know your mental state and don't overlook or dismiss concerns. The Lawyers Helping Lawyers Assistance Program provides free assistance to all OBA members.
- **Believing it cannot happen to you** | You're a good lawyer, but any lawyer can be sued and even claims without merit require defense. The best way to avoid the hardship that can come with them is to maintain quality professional liability insurance.



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