

LDA Client's Bill of Rights and Responsibilities

By the Alliance of Legal Document Assistant Professionals, Inc.

Legal Document Assistants (LDAs) are bonded and registered professionals whose conduct is governed by the California Business & Professions Code. LDAs are required to maintain high professional standards and refrain from unethical

conduct, including the unauthorized practice of law. Accordingly, clients who chose to retain the document preparation services of an LDA are guaranteed certain rights, and are obligated to fulfill key responsibilities in the handling of their legal matters.

Every client has the right to:

- Upfront pricing.
- A fully-executed copy of the Legal Document Assistant Contract, as set forth in 16 CCR § 3950, at the beginning of the LDA-client relationship.
- Clear communication regarding the scope of LDA services available, and the meaning of "self-help service" within the context of the LDA-client relationship.
- Professionally prepared legal documents that accurately reflect the information provided by the client; and any errors being addressed quickly and equitably.
- Referrals to attorneys, legal aid, or other legal service providers to answer specific legal questions regarding the client's particular situation.
- Exclusively control and direct his or her legal case, strategy, argument and implementation.
- Access to published legal materials to assist him or her in making informed decisions.
- Confidentiality, to the fullest extent permitted by law.
- Be presented with a copy of the LDA's registration credentials.
- Information about how to resolve any disputes that may arise out of the LDA-client relationship.
- Reasonable and timely responses to all communications.
- Complete access to the entire client file maintained by the LDA, and immediate return of documents upon request.

Every client has the responsibility to:

- Educate himself or herself of the potential legal options applicable to his or her particular situation or objectives.
- Seek qualified legal counsel if the LDA determines that he or she requires the services of an attorney.
- Refrain from requesting or expecting that the LDA provide legal advice (i.e. asking the LDA to apply the law to the facts of the client's specific situation)
- Provide clear and complete written instructions to direct the LDA in the preparation of legal documents.
- Provide reasonable and timely responses to all communications from the LDA.
- Carefully review any document prepared by the LDA before the document is signed and filed, recorded or served.
- Present any questions or concerns prior to final documents being prepared.
- Make all payments according to the terms stated in the contract.

*Professional Integrity
Consumer Protection*



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