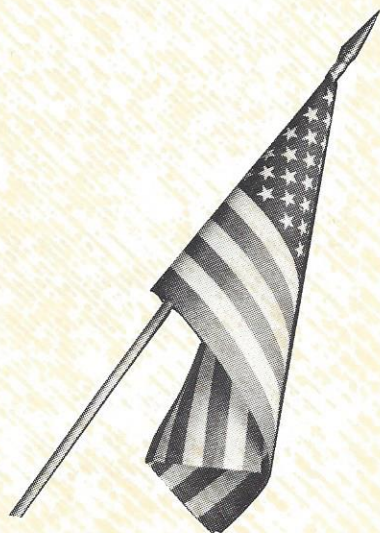


# The Freelance Legal Secretary

Ready to declare  
your independence from the  
9-to-5 office routine? Here's  
what you need to know about  
launching a freelance career.

■ By Patricia A. Garcia,  
Certified PLS



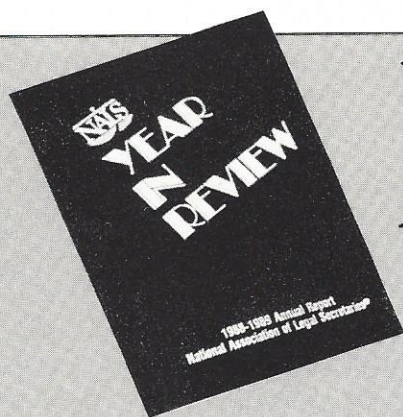
**F**reelancing has long been associated with writers and artists who are commonly not "employed" by anyone; thus, these persons sell their services without long-term commitment to any one employer and remain independent. This concept is changing today to meet the needs of a changing work force. Freedom, variety, and independence are receiving increased emphasis as the attitude toward work shifts to accommodate our modern lifestyles.

I had been a legal secretary/assistant for 10 years, always searching for

the ideal position that would not only give me more responsibility, but one that would present a true challenge. I wanted to set my own goals and know the satisfaction of achieving them. I found the perfect alternative by joining the growing number of Americans who leave the 9-to-5 office routine every year to become self-employed.

Maybe you, too, are thinking it's time to declare your independence and take this step. Freelancing, like any business, is work—hard work—and it pays off in direct proportion to the time and energy put into it. I've found it to be a very rewarding





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career, and profitable, too, one which is not as difficult to embark on as you might think. Let's take a closer look.

### Pros and Cons

The advantages and disadvantages of a freelance career must be weighed based on your own specific needs. One distinct benefit is the sense of pride that comes from running your own business, and the independence achieved by becoming your own boss.

Another obvious plus is the flexibility you gain. Within the demands of the client, you are free to pick the days and hours you prefer to work, and you are free to turn down an assignment that has no appeal to you. You can work as much or as little as you want.

But let's not forget that this is a real job! There will still be deadlines that must be met, the cash flow may not be regular or dependable, and of course, you are responsible for obtaining and maintaining all the necessary business licenses and permits, paying taxes, etc.

The tangible requirements are minimal: a desk, a good chair, a telephone, a typewriter, and a few office supplies. A personal computer, though not a necessity, will certainly be beneficial and may make your services more attractive to some firms.

Finding the right space to house this equipment, however, can be tricky. Most basic simple services can be offered from your home or apartment if you have a spare bedroom or a large enough corner, subject to your local zoning ordinances and the cooperation of your neighbors.

If you prefer the atmosphere of a professional office outside your home, you will still have these features to consider: ample space to work comfortably, adequate power sources, adequate light and ventilation, privacy, and a place to store your files, supplies, reference books, etc.

### Basic Requirements

For acceptance in the field of law, there are several basic professional re-



quirements of the legal secretary: ethical, educational, and experience-related. Of these, the two that carry the most importance are ethics and education.

Ethics is not only the concern for the right-and-wrong of business dealings, but extends to principles of con-

*"Lack of discipline is probably the biggest problem you will encounter. You must be prepared to become self-reliant when you're involved in your own business..."*

duct in all aspects of human relations. The same guidelines that apply to you and your employers in a law office will continue to govern your work as a freelance legal secretary. Avoiding conflicts of interest and maintaining the client's confidences will take on extreme importance when you begin working for more than one attorney or firm.

As for education, you are probably already aware that formal training is not as necessary as a commitment to continuing education. For a freelancing legal secretary, this takes on special importance, as you will need to keep up-to-date with changes in the law and stay abreast of new procedures that will allow you to offer high-quality services.

This can be accomplished through attendance at courses and seminars, and by reading legal publications available through subscription or at your local library. Membership in a professional organization such as NALS is an excellent way to maintain your knowledge and retain your contacts with other legal secretaries.

## Gauging Your Entrepreneurial Aptitude

Of course, you should have a working knowledge of the business world in addition to your technical and administrative skills; experience and training will be the foundation of your business. Finally, you must have

a healthy amount of energy, enthusiasm, courage, and self-discipline. Lack of discipline is probably the biggest problem you will encounter. You must be prepared to become self-reliant when you're involved in your own business, especially if you're working alone, out of your home.

If you have these qualifications and are seriously thinking about going out on your own, it's time to get a paper and pencil and begin making notes. Have you carefully thought out your goals? What are your true capabilities? Aside from your technical skills, do you possess an entrepreneurial spirit? Have you determined why you want to go into business, and what makes you think you can succeed?

The Office of Management Assistance, U.S. Small Business Administration, has published a handbook directed to women who are considering new business ventures. It contains a short quiz that has been developed to help you decide if an independent business venture is really for you.

## Capital Investments

Before you make the commitment, you must take some time and review your financial situation. Starting any new business will require some money, and you must be realistic in your financial planning. Do you know what services you want to offer; what services your prospective employers are willing to contract for? Do you have an idea of the fees you will charge and what your prospective employers are willing to pay?

It takes time to build a clientele, and it may be a while before the cash flow is regular. Be sure to have your personal finances in order by determining your present needs and how you plan to continue meeting them until you get the business off the ground. In your favor is the fact that the initial investment is quite low in comparison to other types of businesses.

You can start slowly, accepting only assignments that will not require much more equipment than is outlined above. Additionally, employers are becoming more receptive to using outside independent services as they

are forced to seek new cost-effective measures in an increasingly competitive world.

If you find you are not ready to take the deep plunge and give up the steady paycheck, freelancing lends itself very well to moonlighting. Begin by accepting assignments that do not conflict with your present job and can be done after hours and on weekends. It will not be easy to maintain a full-time job and deal with your other personal responsibilities, but as your list of clients grows, as you find that you have more work than can be done in the limited hours available, and as the cash flows, you'll be in a better position to make a full-time commitment to self-employment.

## Are Two Heads Better Than One?

After giving much thought to the foregoing details, you should have a

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pretty good idea of whether you are ready or able to step out on your own. If you're still a bit leery, why not consider taking on a partner? If each of you can contribute different skill

lems, and aid in general decision-making.

A complete business plan will identify who is involved in the business and contain a detailed explanation of the services

advertising, meeting with prospective clients, and selling your services.

But once the preliminaries are over, it's time to work. With the sense of pride that comes from all this independence, there is also a sense of dread. The pendulum swings back and forth, up and down. Perhaps it's a little lonely and quiet. Maybe the sunshine is terribly inviting, or there is just too much to do. This is when your self-discipline, those time management skills, and that positive attitude play their role. With the use of a good calendaring system, the support of your family and friends, and your own determination, it will be that much easier to enjoy your independence and exercise the flexibility you have found.

Let's not forget that as the boss, there is one more responsibility you must assume—that of records manager. In the legal field, the maintenance of a client index to avoid conflict of interest situations, clear time-keeping records for billing purposes, and the preservation of confidentiality of a client's records and privileged communications is critical. This is supplemental to the need for accurate, up-to-date financial records for tax reporting purposes, as well as to provide data that will assist you in money management matters.

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levels and expertise in different areas of law, it may be easier to get your business started by working together.

Aside from the obvious necessary technical skills and financial requirements, things to look for in a partner are: patience, a sense of humor, an open and honest willingness to communicate, and someone with whom you have good "chemistry" and share a mutual respect.

If you do decide to team up with a partner, you must both recognize the major commitment each of you needs to make. Talk to a lawyer about the pros and cons of forming a partnership or incorporating, and make sure you both will be operating with the same understandings and goals; put it all in writing.

### Preparing the Plan

Another facet of launching a business is development of a business plan, whether or not you have a partner. Remember, you will be operating a real business, even if it is out of your home and you work alone. A business plan is not simply a tool to obtain bank financing, although that is the common purpose for preparing one. You've probably heard the saying, "A business that fails to plan, plans to fail." It applies to a freelance service as well as to any other business.

After completion, you should be prepared to review and update the plan on a regular basis. This will, in effect, give you a picture of where the business has been and where it is going, alert you to any potential prob-

lems, and aid in general decision-making.

This information should be followed by a description of your working environment, the office space (whether in your home or in leased or owned facilities), and the equipment you have or will acquire and use. A discussion of the expected or actual start-up plans will be helpful, and you also should describe the major underlying operating plans.

Consideration might be given to present trends in the field, how the competition meets the needs of its customers, any technological changes forecasted and proposed methods of dealing with challenges and problems.

A logical follow-up to these considerations is an outline of marketing strategies, goals, and procedures to be used to meet expectations. The most difficult appendix to your business plan, but probably the most important, will be a revenue forecast and proposed budget. Although this might seem like a lot of work for a small-scale operation, remember that the business plan is a plan for the future of your business.

### Mixed Emotions

You may not have many assignments to work on initially, which is just as well, since you'll be busy buying equipment and supplies, designing or redesigning your working space, ordering business cards and/or brochures, planning your

### Finding your Niche

I have only touched on the basics of this flexible alternative to full-time employment. If you're ready to further explore the world of freelancing as a legal secretary, I advise you to check out the many sources of information available. Read other articles and books on self-employment, talk to other professionals—teachers, accountants, lawyers, executives, and successful freelancers, or sign up for a seminar or short course on running a business.

Maybe you, too, can help employers maintain the level of professional services they wish to offer, in your own way. Good luck! ■

*Patricia A. Garcia worked as a freelance legal secretary for four years. She is a member of Santa Fe LSA (NM).*