

Basic Types of Legal Documents

- Instrument
 - This is a formal legal document that grants (or proves the grant) of a right. Examples:
 - Deeds, Wills, Mortgages, etc.
- Pleading
 - This is a formal statement by a party in the context of litigation. Examples:
 - Complaints, answers
- Document
 - This applies to any other communication set to a permanent medium that is relevant to a legal issue. Examples:
 - Police reports, photographs, letters, etc.

Types of Legal Instruments

- Contract
 - Any written agreement can fall under this heading
- Deed
 - This transfers any interest in real estate
 - Including easements, mortgages, etc.
- Business Documents
 - Article of incorporation, bylaws, partnership agreements
- Will/ Codicil
 - These are special legal documents that allow gifts to be given after one's death
- Trust
 - Establishes an agreement whereby the trustee agrees to hold property for the beneficiary

Obtaining Background Information

- Preparation and execution of any legal task requires, at its threshold, certain information from the clients. This can be obtained at an interview and/or through a questionnaire. This information includes:
 - Family information
 - Financial information and which other advisors the client is working with
 - Employment information
 - Health information
 - Important documents relevant to the client
 - (If a civil action) All information and documentation relevant to the case

Where to Get Forms

- Very few documents are drafted from scratch. Almost all documents are drafted from templates belonging to the firm or accessed elsewhere.
- A big part of drafting many forms is locating appropriate templates. There can be gotten from:
 - Documents done for previous clients
 - Commercial forms producers, such as:
 - American Jurisprudence Legal Forms
 - West Legal Forms
 - Online sources

General Form of Legal Writings

- For the most part, you can choose your own type of paper, ink, etc. However, for certain instruments and in papers submitted to a court, there are often rules regarding these things, which must be followed.
- Court that have such rules often publish them in a circular that can be obtained from the court.
- Always ask the clerk when in doubt!

Some physical aspects to Legal Documents

- Paper
 - Use letter size in general; legal size is sometimes used as well and may be required for certain types of instruments such as deeds
- Typeface
 - Use a conservative, traditional font
- Margins
 - Make sure to use margins big enough to make reading comfortable; such as 1-1.5 inch margins
- Spacing
 - Pleadings and some instruments should be double spaced
 - Most other documents can be 1.5 spaced
 - Letters are often single spaced

Special Components of Legal Documents

- In addition to the body of the document, legal documents often must contain:
 - Caption (for anything submitted to the court)
 - Heading (for most legal documents, including letters, etc.)
 - Place for signatures, especially for instruments
 - Acknowledgment/ space for the document to be notarized, where appropriate
 - Filings with the court often must also have space for the attorney to sign as well

Special Mechanical Rules for Legal Documents

- The following are often put in ALL CAPS:
 - Names of people or businesses, organizations, etc.
 - Title of the instrument
 - Header words of important paragraphs (e.g., “WHEREAS”)
- Grammar and spelling
 - Correct grammar and spelling are important not only to avoid changing the meaning of the document, but also to present an aura of professionalism
- Numbers are often written in both English and Arabic numbers; e.g.,
 - Ten thousand Dollars (\$10,000)
- Page numbering
 - The first page is not numbered; all subsequent pages are numbered at the bottom center.

A scroll of parchment is unrolled, showing a large, blank space in the center. The parchment is yellowed and has some texture. The scroll is held by wooden rods at the top and bottom. The text "QUIZ TIME!" is written in the center of the scroll.

QUIZ TIME!

Pre-Printed Forms

- Sometimes, courts or other agencies will have specific forms that they will require for certain tasks. To use such forms:
 - Some may be available in Word (or similar) format. There can be filled in easily on your computer.
 - Sometimes, courts require affidavits that you did not change anything substantive about the form so that the clerk does not have to read through the entire form
 - If you cannot secure these forms in Word (or similar) format, the best thing is to fill it in with a typewriter, though very neat print writing is usually also accepted.
- Inserting “N/A” or “0” is preferable to leaving the space blank.