

LitigationGod

HOW TO START YOUR OWN LAW FIRM

A Practical Guide for Attorneys

From Insurance to AI Tools: Everything You Need to Launch

2026 Edition

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1. Insurance

Before you see your first client, you need to be properly insured. Three types of coverage are essential for any new law firm: professional liability (malpractice), cyber liability, and commercial general liability (CGL).

1.1 Professional Liability (Malpractice) Insurance

Malpractice insurance protects you if a client alleges you made an error, missed a deadline, or otherwise failed to meet the standard of care. While Florida does not mandate malpractice insurance for attorneys, operating without it is a significant financial risk. Many courts and clients will require proof of coverage before you can take on work.

1.1.1 Top Carriers and Brokers

- **ALPS:** The largest legal malpractice carrier focused exclusively on solo and small firms. Endorsed by more state bar associations than any other insurer. Coverage ranges from \$100K/\$300K up to \$2M/\$4M for solos, with deductibles from \$1,000 to \$25,000.
- **CNA:** One of the biggest players in professional liability. Provides dedicated underwriting for firms with 1 to 34 attorneys through exclusive state administrators.
- **Travelers:** Policies automatically include network and information security coverage, acquisitions coverage, and crisis event expense coverage.
- **Chubb:** Additional well-known option worth getting quotes from, especially for larger or multi-practice firms.
- **Liberty Mutual:** Another strong carrier for professional liability, particularly for firms that want to bundle multiple coverage types.

Pro Tip

Work with a broker who specializes in professional liability for lawyers. General commercial insurance brokers often don't understand the nuances of legal malpractice policies, which can leave you with coverage gaps you won't discover until it's too late.

1.1.2 Eroding vs. Non-Eroding Policies

One of the most important distinctions in legal malpractice insurance is how the policy treats defense costs. This single factor can mean the difference between having full coverage when you need it and discovering your limits have been eaten up by legal fees before a case even reaches resolution. Every attorney shopping for malpractice insurance needs to understand this distinction before signing a policy.

Eroding Policies (Defense Within Limits)

An eroding policy, sometimes called a "wasting" or "burning limits" policy, means that every dollar your insurer spends defending you against a malpractice claim reduces the amount of coverage left to pay a settlement or judgment. So if you carry \$500,000 in coverage and your defense costs run \$150,000, you only have \$350,000 remaining to cover any damages.

Pros

- Lower premiums. Eroding policies are significantly cheaper because the insurer's total exposure is capped at the policy limit regardless of how much the defense costs.
- Widely available. Most legal malpractice policies in the market are eroding, so you have more options to choose from.
- Adequate for many solos and small firms. If you practice in lower-risk areas and carry sufficient limits, the eroding structure may never become an issue.

Cons

- Your coverage shrinks as defense costs mount. In a complex or prolonged claim, defense fees can consume a large portion of your limits before you even get to settlement or trial.
- Creates a built-in conflict of interest. You want to preserve your limits for a potential settlement, while your insurer-appointed defense counsel may aggressively litigate, burning through your coverage in the process.
- Risky for high-exposure practices. If you handle litigation, real estate closings, or trust and estate work where claim values can be high, an eroding policy can leave you dangerously underinsured.

Non-Eroding Policies (Defense Outside Limits)

A non-eroding policy covers defense costs separately from, and in addition to, your stated liability limits. Your full policy limits remain intact regardless of how much the insurer spends defending you. If you carry \$500,000 in coverage and defense costs hit \$150,000, you still have the full \$500,000 available for damages.

Pros

- Your full limits are always available for settlement or judgment. Defense costs never eat into the money available to resolve a claim.
- No conflict of interest. Since defense spending doesn't reduce your coverage, there's no tension between mounting a vigorous defense and preserving your limits.
- Better protection for complex claims. If a case goes to trial or involves extensive discovery, you're not penalized for the cost of your own defense.

Cons

- Higher premiums. Non-eroding policies cost more because the insurer's potential payout is higher (full limits plus defense costs).
- Harder to find. Not every carrier offers non-eroding policies for legal malpractice, particularly at the solo and small firm level.
- May be overkill for low-risk practices. If you handle transactional work with low claim frequency and severity, the premium difference may not be justified.

Bottom Line

If you can afford it, a non-eroding policy is the stronger choice. Defense costs in a malpractice claim can easily reach six figures, and you do not want those dollars coming out of the coverage that's supposed to protect you from a judgment. At minimum, if you go with an eroding policy,

consider carrying higher limits to create a buffer. Ask your broker to quote both structures side by side so you can make an informed decision.

1.2 Cyber Liability Insurance

Law firms are high-value targets for cyberattacks because of the sensitive client data they hold. A breach can result in regulatory fines, notification costs, and devastating reputational damage. Cyber insurance covers incident response, forensics, client notification, credit monitoring, and legal defense costs.

1.2.1 Top Cyber Insurance Carriers

- [Cowbell](#): Standout option for solo and small firms. Pioneered Adaptive Cyber Insurance, which continuously assesses your risk profile. Their partnership with The Bar Plan makes them especially accessible to legal professionals. Available in all 50 states.
- [Coalition](#): One of the largest cyber insurance providers, offering active insurance paired with cybersecurity tools. Their platform continuously monitors your digital footprint and alerts you to vulnerabilities.
- [Embroker](#): Digital-first brokerage that bundles cyber with professional liability and D&O coverage. Particularly startup-friendly with a streamlined online application process.
- [At-Bay](#): Combines cyber insurance with a unified security platform that includes advisory services, exposure management, and incident response. Not just insurance, but an active security partner.
- [Beazley](#): Full-spectrum cyber coverage for mid to larger firms. Their in-house Beazley Security team (merged with cybersecurity firm Lodestone) provides integrated incident response.
- [Hiscox](#): Well-known small business insurer with competitive cyber policies suited for solo practitioners and small firms.

1.3 Commercial General Liability (CGL)

CGL insurance covers third-party bodily injury, property damage, and advertising injury claims. If a client slips in your office, or if you accidentally damage property at a client site, CGL is what responds. It also covers claims of slander, libel, and copyright infringement in your advertising.

1.3.1 Providers to Consider

- [ALPS](#): Offers CGL specifically tailored for law firms, making it easy to bundle with your malpractice policy.
- [The Hartford](#): Popular with small businesses across industries, including law firms.
- [Progressive Commercial](#): Competitive rates for small firms.
- [Chubb](#): Strong option for firms that want higher coverage limits.

Note

Many landlords and court systems require proof of CGL coverage. It's also common for clients, especially corporate clients, to request certificates of insurance before engaging your firm.

2. Document Management

A solid document management system (DMS) is the backbone of your practice. You need to be able to store, organize, search, and secure every document that touches your firm, from engagement letters to court filings. The choice you make early on will shape your daily workflow for years.

Platform	Key Features	Pricing
FileVine	Case management with AI-powered doc analysis, client portal, task automation, unlimited storage with Docs add-on	Custom pricing; free trial
Clio	Industry-leading practice management; client intake, billing, doc automation, calendar sync, AI features	\$49–\$159/user/month
LexWorkplace	Purpose-built DMS for law firms; one-click save, OCR, version control, role-based access, audit logs	Contact for pricing
NetDocuments	Cloud-native DMS built for strict security and governance; advanced encryption, AI-powered search	Contact for pricing
iManage	AI-powered document and email management; automatic classification, enterprise security	Contact for pricing
PracticePanther	Practice management with secure cloud storage, custom tagging, built-in eSignature, strong automation	\$49–\$99/user/month
Smokeball	Cloud-based productivity software with automatic time tracking, extensive legal forms library	\$179–\$219/user/month
MyCase	Practice management with unlimited storage, real-time collaboration, client portals	\$39–\$99/user/month
Dropbox Business	Cloud storage with MFA, SOC 2 and ISO 27001 certified, HIPAA BAA available	\$15–\$24/user/month

2.1 Platform Pros and Cons

Every DMS has trade-offs. Here is a quick breakdown to help you narrow down your options:

2.1.1 Legal-Specific Platforms

FileVine offers fast document access with strong task management and communication features, but lacks native document version history and requires significant customization to get document workflows dialed in.

Clio is the most complete all-in-one solution with great Microsoft Office and Google Drive integrations, but the extensive feature set creates a steep learning curve, and the full suite can be overwhelming for very small practices.

LexWorkplace excels at collaboration and legal-specific features like document profiling and ethical walls, with solid Microsoft 365 integration. The downside is that subscription plans run more expensive, which can be a stretch for firms on tight budgets.

NetDocuments has the strongest security features and audit trails of any legal DMS, with built-in encryption and AI-powered search. However, Mac compatibility is limited (may require Parallels) and there is no built-in migration support.

iManage offers AI-powered automatic classification and is built for enterprise-level security needs. It is a strong choice for larger firms but can be expensive and complex to implement for solos and small firms.

2.1.2 Practice Management with DMS

PracticePanther is budget-friendly with strong automation features and integrations with QuickBooks and LawPay. The basic tier is limited, though, and it is less comprehensive than dedicated enterprise DMS solutions.

Smokeball stands out for automatic time tracking and an extensive legal forms library. It functions more as desktop software than a fully cloud-based platform, and pricing on higher tiers can get steep.

MyCase is affordable with excellent client communication features including portals and secure messaging. The basic plan lacks some key features, so you will likely need a higher tier.

2.1.3 General-Purpose Cloud Storage

Dropbox Business offers excellent cloud storage with broad app integrations (Slack, Zoom, Clio). However, it lacks legal-specific features like matter-centric organization, ethical walls, and advanced compliance measures. It also carries a risk of syncing conflicts across multiple devices.

2.2 Minimum Security Requirements

Regardless of which platform you choose, the Florida Bar and your ethical obligations require that you take reasonable steps to protect client data. At minimum, your document management system should meet the following standards:

- **Encryption:** AES-256 encryption for data at rest, plus encryption for data in transit (TLS 1.2 or higher).
- **Access Controls:** Role-based access with the principle of least privilege. Only the people who need a file should be able to see it.
- **Multi-Factor Authentication:** MFA should be enabled for every user, no exceptions.
- **Audit Logging:** The system should track who accessed, edited, or downloaded every document.
- **Compliance Certifications:** Look for SOC 2 Type II, ISO 27001, and HIPAA compliance if you handle medical records.
- **Backup and Recovery:** Automated, encrypted backups with a tested disaster recovery plan.

Florida Bar Guidance

Rule 4-1.6(e) requires attorneys to make reasonable efforts to prevent unauthorized disclosure of client information. This includes your technology systems. If you experience a data breach, you may have ethical obligations to notify affected clients.

2.3 Privacy Considerations

ABA Model Rule 1.6 requires lawyers to make reasonable efforts to prevent unauthorized access to or disclosure of client information. Beyond that baseline, several regulatory frameworks may apply depending on the type of data you handle and where your clients are located:

- **Data Residency:** Know where your DMS provider stores data geographically. If you handle EU client data, GDPR may require EU-based servers.
- **Encryption Standards:** Encrypt all client data both at rest and in transit using AES-256 or RSA-2048 equivalent.
- **Ethical Walls:** If your firm handles matters that create potential conflicts, your DMS should support ethical walls that prevent cross-matter visibility.
- **Data Retention and Deletion:** Establish clear policies for how long you keep documents and how you securely delete them.
- **Vendor Due Diligence:** Require Business Associate Agreements from any vendor that touches client data.

Sobering Statistic

According to the ABA 2023 Cybersecurity TechReport, 29% of law firms reported experiencing a security breach. Law firms hold trade secrets, intellectual property, PII, and privileged communications, making them prime targets. Invest in your security posture from day one.

2.4 HIPAA Compliance

If your practice involves any health-related information, such as personal injury, medical malpractice, workers' compensation, or mass tort litigation, you are almost certainly handling protected health information (PHI). That makes your firm a Business Associate under HIPAA, and you are directly liable for compliance.

2.4.1 When HIPAA Applies to Law Firms

Any time you receive, store, or transmit electronic PHI (ePHI), HIPAA applies. This includes medical records obtained during discovery, records from healthcare provider clients, or any engagement where you access patient health data. If you are not sure whether HIPAA applies to a particular matter, assume it does and protect the data accordingly.

2.4.2 Key Requirements

- **Multi-Factor Authentication:** Under the 2026 HIPAA Security Rule updates (the most significant changes since 2013), MFA is now mandatory on every system that touches ePHI.
- **Encryption:** AES-256 encryption is required for all ePHI, both at rest and in transit. The 2026 rule updates eliminated the previous distinction between "addressable" and "required" safeguards.
- **Business Associate Agreements:** You must have a signed BAA with every vendor that processes or stores ePHI on your behalf.

- **Risk Assessments:** Conduct regular risk assessments to identify vulnerabilities in how you handle ePHI.
- **Incident Response:** Have a written incident response plan. Under the updated rules, you must verify adherence within 24 hours of activation.
- **Staff Training:** All firm personnel who handle ePHI must receive HIPAA training. Document the training and update it annually.

2026 Compliance Deadline

The updated HIPAA Security Rule is expected to finalize in mid-2026 with a 240-day compliance window. If your firm handles any medical records, start preparing now. Update your Notice of Privacy Practices, audit your encryption and MFA across all systems, and ensure every vendor has a current BAA in place.

3. Timekeeping Software

Accurate time tracking is how you get paid. Whether you bill hourly, flat fee, or contingency, you still need to track your time for profitability analysis, staffing decisions, and trust accounting compliance. Firms that adopt legal SaaS tools with built-in invoicing and payment features report saving up to 10 hours per month on billing tasks alone.

3.1 Top Timekeeping and Billing Platforms

Platform	Key Features	Pricing
TimeSolv	Time tracking, invoicing, trust accounting with three-way reconciliation, 30+ reports	\$49.99/mo (up to 4 users)
Clio	Full practice management with time tracking, billing, utilization/realization reporting	\$49–\$159/user/month
PracticePanther	Email-driven workflows, Kanban task management, automated billing, ePayments	\$49/user/month and up
Bill4Time	Dedicated time tracking with real-time timers, mobile access, project accounting	From \$27/month
Smokeball	Automatic time capture across emails and documents, invoice automation	\$179–\$219/user/month
CosmoLex	Practice management with built-in accounting, matter management, conflict checker	\$89–\$99/user/month
Rocket Matter	Practice management suite with integrated billing, automated workflows	Contact for pricing

3.2 TimeSolv (Recommended for Solos)

TimeSolv deserves special mention because it is purpose-built for law firms and stands out for its trust accounting compliance features, including automated three-way reconciliation, which is critical for meeting Florida Bar requirements.

3.2.1 Key Features

- Time tracking by task, project phase, or deliverable across desktop, mobile, and offline
- Flexible billing: hourly, retainer, or per-project
- Customizable invoice templates with auto-populated billing data
- Trust accounting with three-way reconciliation automation
- Secure online payments via credit card and ACH
- 30+ customizable reports for revenue, risk, and retention analysis
- Integrations with QuickBooks, NetDocuments, Dropbox, and LawPay

Pricing starts at \$49.99/month for up to four users with a 10-day free trial. Every plan includes all core features.

4. E-Discovery

If your practice involves any form of litigation, you will eventually need to deal with electronic discovery. E-discovery is the process of identifying, collecting, processing, reviewing, and producing electronically stored information (ESI) in connection with legal proceedings.

4.1 Enterprise / High-Cost Platforms

These are the industry heavyweights, designed for complex litigation, large document sets, and multi-party matters.

Platform	Key Features	Pricing
Relativity	Leading AI-powered cloud platform (RelativityOne); search, analytics, ML, contract analysis	Per-volume + features; custom quote
Everlaw	Cloud-native with intuitive UI; Deep Dive AI for natural language queries across millions of docs	Per-user + per-GB; custom quote
Nuix	Processing, ECA, review, production in one; ML document review; 4500+ file types	Per-user or per-volume; custom
Exterro	End-to-end EDRM coverage plus privacy suite; legal hold, data management, collection, review	\$50K+/year; custom quote
Concordance	LexisNexis litigation doc management used by 70K+ professionals; in-house review and production	Annual subscription; custom

4.2 DISCO

DISCO (NYSE: LAW) has positioned itself as a leader in AI-powered e-discovery with its Cecilia AI platform, which saw over 600% revenue growth in Q4 2025. Their all-inclusive per-GB pricing model is one of the most transparent in the industry: a single flat rate covers ingestion, processing, early case assessment, review, and production with no per-user license fees.

Cecilia AI includes Q&A across your entire case, single-document Q&A, automated document review with plain-English tag descriptions, document summaries in any language, and legal timeline generation from uploaded complaints. In 2026, DISCO announced agentic AI capabilities that autonomously reason through document sets to identify connections across large collections.

Contact: Dalton Cade, cade@csdisco.com

4.3 Budget-Friendly Platforms

You do not need an enterprise platform to handle e-discovery competently. These options are built for solo practitioners and small firms.

Platform	Key Features	Pricing
Logikcull	Drag-and-drop ingestion; auto dedup, PII detection, bulk redaction; unlimited users	\$199/month flat rate
GoldFynch	Simplified e-discovery with auto OCR, free processing, unlimited users, drag-and-drop	From \$27/month (3GB)
CloudNine	Hybrid on-prem/SaaS; processes 4500+ file types; handles SMS, Slack, Teams data	\$12-\$35/GB/month
Nextpoint	Per-user pricing with unlimited data uploads, processing, hosting, OCR, and production	Per-user; free productions
Reveal	Advanced AI/ML for predictive coding, clustering, network visualization; cloud or on-prem	Custom quote
Zapproved	Legal hold and doc review for corporate teams; now part of Exterro; M365/Google/Slack integration	Custom quote

For Solo and Small Firms

If you are just starting out and need to handle occasional discovery, GoldFynch or Logikcull are hard to beat on value. GoldFynch starts at \$27/month with all features included and no contracts. Logikcull at \$199/month gives you unlimited users and integrations with tools like Clio and Slack. As your caseload grows, you can always move up to DISCO, Everlaw, or Relativity.

5. Conflict Checks

Before you can take on any new client or matter, you must run a conflict of interest check. This is not just good practice; it is an ethical obligation under the Florida Rules of Professional Conduct (Rules 4-1.7 through 4-1.10). A conflict check searches your firm's records to determine whether representing a new client would create a conflict with any current or former client.

5.1 Why It Matters

Failing to identify a conflict before accepting a matter can lead to disqualification, malpractice liability, and Bar discipline. Even at a solo firm, your database of former clients, adverse parties, and related entities grows quickly. Reliable conflict checking protects you, your clients, and your license.

5.2 Top Conflict Check Software

- **[Intapp Conflicts](#)**: The market leader for larger firms. AI-assisted review with centralized firm-wide data, native integration with D&B, Microsoft 365, and S&P Capital IQ. Custom enterprise pricing.
- **[Clio](#)**: Built-in conflict checking as part of its practice management platform. Searches across your entire client and matter database. Included in all Clio plans (\$49–\$159/user/month).
- **[Lawmatics](#)**: Legal CRM with automated conflict scanning whenever new leads are added. Searches across all fields, notes, and records. Custom pricing.
- **[CosmoLex](#)**: Integrated conflict checker bundled with practice management and accounting. \$89–\$99/user/month.
- **[PracticePanther](#)**: Conflict checking integrated into the matter workflow. Good for small to mid-sized firms. \$49/user/month and up.
- **[iManage Conflicts Manager](#)**: Enterprise-grade conflict checking through internal and external data analysis. Custom pricing.
- **[MyCase](#)**: Full-text search for conflict detection with an intuitive workflow integration. Affordable option for smaller firms.

Practical Advice

Even if you are a solo practitioner on day one, start running conflict checks and documenting them immediately. Build the habit and the database now. When your firm grows, you will be glad you have a clean record of every check you ran from the beginning.

6. Banking

Every Florida law firm must maintain at least two bank accounts: an operating (business checking) account and an IOLTA trust account. The rules around trust accounts are strict, and violations are among the most common reasons attorneys face disciplinary action.

6.1 Trust Account Requirements

Under the Florida Rules, every attorney who receives client funds or funds belonging to third parties must deposit those funds into a trust account. This is not optional. The trust account must be maintained at a bank approved by the Florida Bar, and the account must be clearly labeled as a trust account.

Rule 5-1.1	<p>Trust Accounts</p> <p>Governs the establishment and maintenance of lawyer trust accounts. Money or other property entrusted to a lawyer for a specific purpose, including advances for fees, costs, and expenses, must be held in trust and applied only to that purpose.</p>
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Rule 4-1.15	<p>Safekeeping Property</p> <p>Requires lawyers to hold client property separate from their own. Client funds must be kept in a separate trust account. The lawyer must maintain complete records and render a full accounting upon request.</p>
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6.2 Trust Accounting Best Practices

- Never commingle personal or firm funds with client trust funds.
- Maintain a separate ledger for each client whose funds are in trust.
- Perform three-way reconciliation monthly: bank statement vs. trust account ledger vs. individual client ledgers.
- Keep trust account records for at least six years after the representation ends.
- Only withdraw earned fees after providing the client with an invoice or billing statement.
- Disputed funds must remain in trust until the dispute is resolved.

6.3 Operating Account

Your operating account is where earned fees, after being properly transferred from trust, are deposited. It covers rent, salaries, software subscriptions, insurance premiums, and all other business expenses. Keep this account completely separate from your personal finances and from your trust account.

Practical Advice

Choose a bank that has experience working with law firms and understands IOLTA requirements. Many Florida banks offer dedicated IOLTA products. Ask about overdraft protection policies; some banks will let you opt in to alerts if your trust balance drops below a threshold, which helps you catch problems early.

7. Website

Your website is your digital storefront. For most potential clients, it will be their first impression of your firm. It needs to look professional, load fast, and clearly communicate who you are and what you do.

7.1 Building Your Site with AI

AI tools like Claude can dramatically speed up website creation. You can use Claude to draft your entire site's content, including attorney bios, practice area descriptions, FAQ pages, and blog posts. AI can also help generate meta descriptions and SEO-optimized copy.

7.1.1 Recommended Platforms

- [Squarespace](#): All-in-one platform with built-in hosting, domain registration, and an AI builder called Blueprint. Great for attorneys who want a polished site without touching code.
- [WordPress](#): More flexible and powerful than Squarespace, but requires a separate hosting provider. AI tools like 10Web and ZipWP can generate full WordPress sites from a text description.

7.2 Domain and Hosting

Register your domain through your hosting provider or a registrar like Namecheap or Google Domains. For a law firm, your domain should ideally be your firm name followed by .com or .law. Avoid hyphens and unusual extensions. For hosting, managed WordPress hosting from providers like WP Engine or Flywheel gives you better security and performance than budget shared hosting.

8. Social Media

Social media is a free (or nearly free) way to build your brand, establish thought leadership, and generate referrals. The key is to focus on the platforms where your potential clients and referral sources actually spend time, and to show up consistently.

8.1 Platform Priorities

- [LinkedIn](#): Non-negotiable for any attorney. This is where other lawyers, corporate counsel, and professionals will find and evaluate you. Post regularly about your practice areas and engage with your network.
- [Instagram](#): Works well for consumer-facing practices like personal injury, family law, and immigration. Visual storytelling and short-form video perform well here.
- [TikTok](#): If your target clients skew younger, short legal explainer videos can generate enormous reach. Several attorneys have built massive practices through TikTok alone.
- [Google Business Profile](#): Technically not social media, but equally important. Claim your profile, keep your hours and contact info current, and actively request reviews.

Ethics Reminder

Florida Bar advertising rules (Rules 4-7.11 through 4-7.21) apply to social media. Every post is potentially an advertisement. Avoid making promises about outcomes, be careful with testimonials, and make sure any specialization claims comply with Bar rules.

9. Hiring

Building your team is one of the most impactful decisions you'll make. The right hires multiply your capacity and let you focus on the work that only you can do. The wrong hires drain your time, your money, and your energy.

9.1 Legal Staffing Agencies

When you need to scale up, staffing agencies can place experienced legal talent quickly.

9.1.1 Latitude Legal

Latitude Legal specializes in placing experienced legal professionals from Big Law and in-house backgrounds. They offer contract, contract-to-hire, and direct-hire placements across a range of practice areas, including commercial contracting, data privacy, M&A, employment law, and litigation. They also provide fractional General Counsel placements.

Contact: Kyle Robisch, KRobisch@latitudelegal.com

9.1.2 Other Staffing Agencies

- **[Robert Half Legal](#):** One of the oldest and largest legal staffing firms with 300+ locations nationally. Can place talent in as little as 48 hours.
- **[Axiom Law](#):** Global leader in on-demand legal talent with a network of 14,000+ lawyers and 3,500+ corporate clients.
- **[Hire an Esquire \(MLA\)](#):** Tech-driven platform with 29,000+ attorneys and paraprofessionals available on-demand 24/7.
- **[Lateral Link](#):** Global legal recruiting firm specializing in partner and group placements.
- **[Special Counsel \(LHH\)](#):** Legal staffing brand under the Adecco Group. Serves law firms with flexible staffing solutions.
- **[BCG Attorney Search](#):** Specialized legal recruiting firm with an attorney-led recruitment team.

9.2 Remote Paralegals from South America

A growing number of U.S. law firms are hiring remote paralegals and legal assistants from South America, particularly Colombia, to handle tasks like legal research, document preparation, and medical lien management. The cost savings are substantial: a qualified South American paralegal typically costs \$15,000 to \$25,000 annually, compared to \$50,000 or more for a U.S.-based paralegal.

9.2.1 Key Considerations

- Vet candidates for English fluency, legal research skills, and familiarity with U.S. legal systems.
- Use reputable staffing platforms like GlobalTeam, Remote Legal Staffing, or Virtual Latinos.
- Set clear expectations around working hours, communication cadences, and confidentiality.
- Provide access to your firm's systems through secure VPN and enforce the same data security standards you would for U.S.-based staff.

9.3 Employment Contracts

Every person who works for your firm, whether full-time, part-time, or contract, should sign a written agreement that covers at minimum:

- Scope of work and reporting structure
- Compensation, benefits, and payment terms
- Confidentiality and non-disclosure obligations
- Non-solicitation of clients (consult Florida law on enforceability of non-competes)
- Data security obligations and acceptable use of firm technology
- Termination provisions

Critical

Confidentiality provisions are not just good practice; they're an ethical obligation. Under Rule 4-5.3, you are responsible for ensuring that non-lawyer assistants comply with the Rules of Professional Conduct. A solid confidentiality agreement is your first line of defense.

10. Engagement Letters

An engagement letter is the foundation of the attorney–client relationship. It sets expectations, defines the scope of your work, and protects both you and your client when misunderstandings arise. Failing to use engagement letters is one of the most common sources of malpractice claims and Bar complaints.

According to the Lawline course on engagement letters by Anthony Davis, Jayne Reardon, and Jackie Schimmel, engagement letters serve multiple purposes: they cement the attorney–client relationship, replace fear with trust, avoid misunderstanding, and help avoid claims.

10.1 What to Include

A comprehensive engagement letter should address each of the following areas:

10.1.1 Identification of the Client

- Name the client (and any co-clients) explicitly.
- Explain the duty of loyalty owed to the client.
- State clearly that you are not representing shareholders, partners, affiliates, subsidiaries, officers, directors, employees, or any other person or entity.

10.1.2 Scope of Services

- Provide a detailed, itemized description of the work to be performed and the client’s desired objective.
- Describe any limitations on the scope of your services.
- Detail how the firm will communicate with the client, including status updates and document sharing.
- Include a no–guarantees provision stating that no warranties or representations have been made about the outcome.
- Include Corporate Transparency Act (CTA) disclaimers if the engagement involves entity formation.

10.1.3 Conflicts of Interest

- Disclose any potential conflicts and include advance waiver language if appropriate.
- Encourage the client to consult with other counsel regarding the waiver.
- Include an acknowledgment that the client has had an opportunity to consult with other counsel.

10.1.4 Fees and Billing

- Specify the fee structure: hourly, flat fee, capped fee, or contingent.
- For hourly billing, provide rates for each attorney and staff member who will work on the matter.
- Explain retainer requirements and how the retainer will be handled (evergreen/replenishing vs. applied against bills until exhausted).

- Specify billing frequency, payment terms, and what will be billed in addition to fees (costs, expenses, etc.).

10.1.5 Termination of Representation

- State that the client may terminate the representation at any time upon written notification.
- Reserve the firm's right to withdraw as per the Rules of Professional Conduct.
- Specify that fees and costs for work already performed remain payable.

10.1.6 Additional Provisions

- Choice of law clause.
- Arbitration or dispute resolution clause.
- Entire agreement provision.
- Effective date and signature block for both parties.

10.2 Florida Bar Rules on Engagement Letters

<p>Rule 4-1.5</p>	<p>Fees and Costs for Legal Services</p> <p>Requires that all fees be reasonable. Contingent fee arrangements must be in writing and signed by the client, clearly stating the fee calculation method, whether the percentage varies by case stage, how expenses are deducted, and whether the client is responsible for costs if there is no recovery.</p>
<p>Rule 4-1.2</p>	<p>Objectives and Scope of Representation</p> <p>Allows a lawyer to limit the scope of representation if the limitation is reasonable under the circumstances and the client gives informed consent.</p>
<p>Rule 4-1.7 / 4-1.8</p>	<p>Conflicts of Interest</p> <p>Rule 4-1.7 addresses current client conflicts. Rule 4-1.8 governs specific conflict situations including business transactions with clients, malpractice liability limitations, and financial assistance to clients. Advance conflict waivers should be drafted carefully.</p>

11. AI Tools

Artificial intelligence is reshaping legal practice, and solo and small firms stand to benefit the most. AI can level the playing field by giving you access to capabilities that used to require a team of associates or expensive outside vendors.

11.1 Claude by Anthropic

Claude is a powerful AI assistant that excels at document analysis, legal drafting, and research support. Its large context window lets you upload and analyze full-length contracts, briefs, and medical records in a single conversation. Attorneys report that Claude can reduce drafting time by 60 to 80 percent for routine documents like demand letters, motions, and client correspondence.

11.1.1 How Attorneys Use Claude

- Drafting and revising pleadings, motions, demand letters, and engagement letters
- Summarizing lengthy documents, depositions, and medical records
- Legal research and case law analysis (always verify citations independently)
- Generating website content, blog posts, and marketing copy
- Preparing for depositions and oral arguments through simulation
- Building internal templates and checklists

Important Caveat

AI tools are assistants, not replacements. You must verify every citation, check every factual claim, and exercise independent professional judgment. Consider including language in your engagement letter explaining how AI may be used in your representation.

11.2 Google NotebookLM

Google NotebookLM is an AI-powered research assistant that analyzes materials you upload (PDFs, Google Docs, website links, YouTube transcripts) and answers questions exclusively based on that content. For lawyers, this means you can upload a set of contracts, deposition transcripts, or case filings and get AI-generated analysis grounded in your actual documents.

The free tier supports 50 sources per notebook. Google Workspace Plus (\$14/user/month) bumps that to 300 sources. The Ultra tier at \$249.99/month is designed for heavy professional use. For law firms, the Workspace version is the only appropriate option because Google commits to not training models on Workspace user data.

11.3 Other Notable AI Tools

11.3.1 Legal-Specific

- **Harvey:** Purpose-built for legal work with best-in-class privacy. Never trains on customer data. SOC 2 Type II, ISO 27001 certified.

- **Spellbook:** Focused on contract drafting and review. Offers clause suggestions, automated redlines, and benchmarking tools.
- **Lexis+ AI:** LexisNexis’s AI assistant with conversational legal search, case summaries, and citation verification.
- **CoCounsel:** Thomson Reuters’ legal AI built on Westlaw and Practical Law. Deep Research agentic capabilities for large-scale document analysis.
- **EvenUp:** AI for personal injury firms. Generates demand letters and medical chronologies from case files.
- **Eve by Luminance:** AI that reviews, redlines, and negotiates contracts autonomously.

11.3.2 General-Purpose Tools Useful for Lawyers

- **Clio Manage AI:** Built into Clio’s practice management platform. Summarizes case notes and drafts communications.
- **Perplexity AI:** AI-powered research assistant that provides sourced answers with citations. Enterprise tier required for data protection.
- **Microsoft Copilot:** Integrated into Microsoft 365 for document drafting, email summarization, and data analysis.

11.4 AI Privacy and Data Protection

This is one of the most important considerations for any law firm using AI tools. Under your ethical obligations, you must take reasonable steps to protect client confidentiality. That means understanding exactly what happens to the data you put into an AI system.

11.4.1 The Core Rule

Never use a free or consumer-tier AI product for any work involving client data, privileged communications, or confidential information. Period. Free and consumer tiers almost always reserve the right to use your inputs for model training, which is a direct conflict with your duty of confidentiality under Rule 4-1.6.

11.4.2 Platform Privacy by Tier

Platform	Key Features	Pricing
Claude (Anthropic)	Free/Pro: trains on data by default (opt-out available). Team/Enterprise: never trains.	Team: \$30/user/mo; Enterprise: custom
ChatGPT (OpenAI)	Free/Plus: trains by default (disable in Settings > Data Controls). Team/Enterprise: never trains.	Team: \$30/user/mo; Enterprise: custom
Google NotebookLM	Consumer: may use data for training. Workspace: never trains on data.	Workspace: \$14/user/mo; Ultra: \$250/mo
Google Gemini	Consumer: trains by default. Workspace: never trains on data.	Included with Workspace
Microsoft Copilot	Enterprise M365: never trains. Prompts and responses not retained.	~\$30/user/mo with M365

Platform	Key Features	Pricing
Harvey	Never trains on customer data on any plan. SOC 2 Type II, ISO 27001.	Enterprise pricing only
Perplexity AI	Free/Pro: trains by default (opt-out in settings). Enterprise: never trains.	Enterprise: custom pricing

11.4.3 How to Protect Your Firm

- Use Team or Enterprise tiers for any AI tool that touches client data.
- For Claude, go to Settings and disable model improvement if you are on a Pro plan. Better yet, upgrade to Team.
- For ChatGPT, go to Settings, then Data Controls, and turn off model training. Or use Team/Enterprise.
- Avoid AI-powered meeting transcription tools like Otter.ai and Fireflies.ai for privileged conversations.
- Establish a firm-wide AI use policy that specifies which tools are approved, which tiers must be used, and what types of data can and cannot be entered.
- Consider including language in your engagement letters disclosing that the firm may use AI tools.

Sobering Stat

According to the Clio 2025 Legal Trends Report, 79% of legal professionals now use AI tools, but 44% of firms have no formal AI governance policy. Do not be part of that 44%. Draft a policy before your first client engagement.

12. Legal Research

No matter how good your AI tools are, you still need access to authoritative legal research platforms. Case law, statutes, regulations, and secondary sources are the foundation of everything you do.

12.1 Westlaw

Westlaw is the most widely used legal research platform in the United States, with roughly 49 percent market share. It offers access to over 40,000 databases, including case law, state and federal statutes, administrative codes, law journals, treatises, and legal forms. The West Key Number System provides a standardized classification of U.S. law that makes research more efficient, and KeyCite lets you instantly verify whether a case or statute is still good law.

Thomson Reuters has invested heavily in AI across the Westlaw platform. Westlaw Precision uses AI-assisted search that interprets natural language queries and maps them to the most relevant legal concepts. Quick Check analyzes your briefs and memos, identifies the legal issues you've addressed, and flags authorities you may have missed or that your opposing counsel might cite against you.

Their newer AI-Assisted Research feature, powered by CoCounsel, lets you ask research questions in plain English and get AI-generated answers grounded in Westlaw's database with direct citations to primary authority. Litigation Analytics gives you data-driven insights on judges, courts, law firms, and attorneys, including motion grant rates, average time to trial, and damages awarded.

12.2 LexisNexis

LexisNexis is the other major legal research platform alongside Westlaw, and together they dominate the market. Lexis offers access to a massive collection of case law, statutes, regulations, secondary sources, and news content. Its Shepard's Citations service lets you verify whether a case is still good law.

Lexis has a broader news and public records database than Westlaw, which is useful for due diligence and background research. Their Lexis+ AI with Protege provides a generative AI research assistant that pulls from authoritative Lexis sources with built-in citation verification.

Negotiation Tip

Both Westlaw and LexisNexis offer significant discounts for solo and small firm practitioners, especially if you are willing to sign a multi-year contract. Always negotiate. Get quotes from both before committing, and don't be afraid to tell each vendor what the other offered.

12.3 Trellis (LexisNexis)

Trellis fills a gap that traditional platforms leave open: state trial court data. While Westlaw and Lexis focus heavily on appellate courts, the vast majority of litigation happens at the trial court level. Trellis aggregates and structures trial court data from over 2,600 counties across 45 states, giving you access to hundreds of millions of motions, briefs, and judicial rulings.

Beyond analytics, Trellis is also an enormous library of real-world litigation documents. If you are a new attorney and you have never drafted a motion to compel in Miami-Dade County, or you need to file a motion for summary judgment in a product liability case, Trellis lets you search for actual motions and briefs that other attorneys have filed on similar issues in the same court. It is basically a massive database of templates drawn from real filings, organized by court, judge, motion type, and legal issue.

12.3.1 What Makes Trellis Valuable

- Judge analytics: see how specific judges have ruled on particular motion types
- Opposing counsel analytics: understand their filing patterns and win rates
- Case outcome predictability based on historical data
- Access to trial court filings that aren't available on other platforms
- Searchable database of real motions and briefs you can use as starting points
- Filter by court, judge, practice area, and legal issue to find the most relevant examples

Cost-Saving Strategy

If budget is tight when you're first starting out, consider Trellis for state court analytics and a basic Westlaw or Lexis plan for federal and appellate research. Some bar associations offer discounted access to members. Also check whether your law school alumni association provides any research platform access.

Final Thoughts

Starting your own law firm is one of the most rewarding and challenging things you can do in your legal career. There's no single right way to do it, but there are plenty of wrong ways, and most of them come down to not planning ahead.

This guide covers the essentials, but every firm is different. Your practice area, your target clients, your geographic market, and your personal risk tolerance will all shape the decisions you make. The important thing is to make those decisions deliberately rather than by default.

Get your insurance in place before you take on clients. Set up your trust account correctly from day one. Use technology to punch above your weight. And invest in good engagement letters, because they're the single most effective tool for preventing problems before they start.

Good luck. You've got this.

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