

Whether you're a seasoned firm owner—or just starting out—the AIA Trust offers you a host of useful tools to make your life easier and your practice more successful.



New Project Resources

- [Project Intake Checklist](#) – This form may help you & your firm to evaluate and manage potential risk.
- [Client Profile Form & Information Checklist](#) – Since appropriate client selection is one of the most important steps in ensuring payment for services, this form and checklist may help you to evaluate whether to proceed with a client.
- [Go-No Go Checklist](#) – The investigation of the client and project, as well as the client education, should lead to a rational and strategic “yes/no” decision whether to proceed with a project – this checklist may help you to make the right decision.
- [Post-Project Evaluation Form](#) – The end of a project may be viewed as a critical opportunity for preparation for the next project.
- [Client Waiver and Informed Consent](#) to Use Experimental Green Product
- [Condo Project Evaluation Form](#)

Office Management Resources

- Financial Tools to assist the New Small Firm*:
 - 1) MyCorp Accountant Incorporation Guide that explains to the new architect the various structures of entities available with a step by step guide.
 - 2) QB Family Guide that offers a quick overview of which QuickBooks product is suitable to the complexity of your business.
 - 3) Sample Balance Sheet from QuickBooks Pro for automatic accounts provided for a LLC (Limited Liability Company) in the Design, Architecture or Engineering industry.
 - 4) Sample Profit & Loss from QuickBooks Pro with additions of Interest Income, Salaries and Wages, Accounting Fees, Outside Services and Drafting Supplies.

*Various trial versions of QuickBooks software can be downloaded for free at www.intuit.com. When purchasing QuickBooks, search for the best deal from Intuit online or other online discount distributors.

Office Management Resources - continued

- [Professional Employer Organization \(PEO\)](#) summary to help you determine whether your firm may outsource cost-effectively to lower expenses. Look for a new PEO program for AIA Members from the AIA Trust in 2015!
- [Sample Document Retention Policy](#)
- Tips for Reviewing a Contract - provided by the AIA Trust Professional Liability Program Insurer, CNA/Schinnerer, designed especially for their Small Firm Policyholders

Professional Liability & Risk Management Resources

- [A report to help you assess your firm's potential risk](#) when applying for professional liability insurance identifying important factors to position your firm in the best light possible.
- [2009 Small Firm Claims Study](#) offers insights of causes and tips on how you can avoid these claims.
- [Understanding the Claims Process](#), a general guide to assist members in the handling of a claim, from the anticipating, reporting & managing a claim, to defending, resolving and even litigating a claim.

More Risk Management Resources:

- [The AIA Trust Professional Liability Database](#) - Visit the database for a searchable directory of Professional Liability Insurers plus several short publications about important considerations and useful tips on how to go about selecting professional liability insurance and selecting a broker.
- **Get a Practice Coach!** [Enroll in LegalLine](#) – for access to a/e legal information and answers to your architectural practice-related legal questions—to prevent costly & destructive legal problems and make your firm more productive. **NEW Introductory member rates** now available for *first-time* subscribers.
- **Helpful Guides, Tips, Reports, Links and More!** Check out [AIA Trust Member Resources](#) for starting and running a firm, managing your risks and your practice—on the AIA Trust website - new ones are always being added!

www.TheAIATrust.com

