CHECKLIST FOR CLOSING YOUR OWN OFFICE

1.   Finalize as many active files as possible.

2.   Write to clients with active files, advising them that you are unable to continue representing them and that they need to retain new counsel. Your letter should inform them about time frames important to their matters. The letter should explain how and where they can pick up copies of their files and should give a deadline for doing so. (See Letter from Planning Attorney Advising That Lawyer Is Closing Law Office).

3.   For cases that have pending court dates, depositions or hearings, discuss with affected clients how to proceed. Where appropriate, request extensions, continuances and the rescheduling of hearing dates. Send written confirmations of these extensions, continuances and rescheduled dates to opposing counsel and to your client.

4.   For cases before administrative bodies and courts, obtain clients' permission to submit motions and orders to withdraw as counsel of record. Review Rule 1.16.

5.   In cases where the client is obtaining a new attorney, be certain that a Substitution of Attorney is filed.

6.   Select an appropriate date and check to see if all matters have a motion and order allowing your withdrawal as counsel of record or a Substitution of Attorney filed with the court.

7.   Make copies of files for clients and yourself. All clients should either pick up their files (and sign a receipt of acknowledging that they received them) or sign an authorization for you to release their files to their new attorneys. (See Authorization for Transfer of Client File and Acknowledgement of Receipt of File forms.)

8.   Write to all clients for whom you have retained original wills, advising them that you are closing your office and request that they pick up their original will. Ask them to sign a receipt and main a record of all wills that are retrieved. Advise them or consequences of failure to comply. (Contact the Law Practice Management Program for file retention and destruction at 404-527-8772.)

9.   Tell all your clients that they can pick up their closed files or where they will be stored and whom they should contact in order to retrieve them. Obtain all clients' permission to destroy their files after approximately six years. If a closed file is to be stored by another attorney, obtain the client's permission to allow the attorney

to store the file for you and provide the client with the attorney's name, address, and phone number.

10.   If you sold your practice, you will have already advised your clients of your prior intent to do so, but advise them also of your having completed the transaction, the location of their files in the event some clients have declined to retain the successor attorney and have not collected or released their files, and readvise your clients of the name, address and phone number of the purchasing attorney.

11.   If you are a sole practitioner, arrange to have your calls forwarded to you or another person who can assist your clients. This eliminates the problem created when clients call your phone number, get a recording stating that the number is disconnected, and do not know where else to turn for information.

12.   Maintain a complete and up-to-date employee file, including resumes,   employment agreements, payroll and tax records and other significant documents. (See Law Firm Master List of Contacts and Important Information form).

13.   Identify all outside service personnel and providers by name, address, phone and fax numbers, and email address. (See Law Firm Master List of Contacts and Important Information form).

14.   Maintain a complete record of all current and past facility and equipment records, including deeds, mortgages, leases and related materials. (See Law Firm Master List of Contacts and Important Information form).

15.   If possible, provide sufficient advance written notice of the closure for your practice so as to provide clients with reasonable and sufficient time to make other arrangements.