

Date

[Name]

[Address]

[City, State ZIP]

Dear [Trusted Colleague, Lawyers Helping Lawyers Team, Other],

Thank you for assisting my clients, family and staff during this difficult time.

#### FIRST THINGS FIRST

My [paralegal] [administrative assistant] is [name]. She can be reached at [home phone number] and [cell phone number]. Her address is [address]. She will be invaluable in taking care of my clients since she knows where everything is. In case she is not available, I have included certain key information to facilitate client care.

#### BANK ACCOUNTS (DO NOT PUT ACCOUNT NUMBERS IN THIS LETTER)

I have a retainer account at [Big Bucks National Bank]. I have a business account at [Green Bucks Credit Union]. My retainer ledger is kept [in the green file in my credenza in my office]. My retainer account check book is kept [under my mattress at home] [in my locked file cabinet in my office, the key to which is on my key chain. A spare is kept by [trusted friend, phone number].

#### MY PRACTICE

My practice area is [estate planning and probate] [dog catcher defense.] I would like [trusted fellow attorney] to take over my active [case type] cases. She can be reached at [phone number].

I would like [trusted fellow attorney] to take over my active [case type] cases. She can be

reached at [phone number]. My active files are kept in my office in the file drawers of my desk and the file cabinet in my office. My inactive files are kept in off-site storage at [storage facility] [in my attic]. I would like my clients to be contacted if possible and given the opportunity to take possession of their file. Client contact information can be found in hard copy [on the inside left side of each file.] [I also maintain a database of client email addresses in my [program name] files.] [Digital files for each client can be found on my laptop on the C Drive under the “Client Files” directory. Clients are listed by last name with first and middle initials.] My client files are organized as follows. Each file contains a form with basic client information [left side of the folder on the bottom] [in each client’s digital file labeled “client info”]. Client deadlines are calendared on [my paper calendar on my desk] [on my google calendar] [on my Blackberry calendar] [in the hard copy file on the left side on top of the client information]. [Include any relevant password info.]

## INSURANCE

I have a malpractice policy with [Lawyers R Us Insurance Company, Policy No. 123abc.] The policy is located in my office in the credenza in my office. I also have a disability policy with [Disability Insurance Company]. The policy is located in my credenza in my office in the file marked “insurance.”

## PERSONNEL/PAYROLL

I have [#] employees. They are [Sally Takenotes, my administrative assistant, phone number; Cathy Workshard, my paralegal, phone number; and Laura Attorney, my associate, phone number.]

Payroll is handled by [my accountant] [me] [my payroll company], [name]. They can be reached at [phone number] and [address].

## BILLING

I use [timeslips] [an excel spreadsheet entitled "billing"] for billing. My billing information can be found [in the "billing" folder on the C Drive of my laptop.] [in a heap on the corner of my desk.]

## VOICEMAIL/EMAIL

My business number is [#]. My voice mail can be retrieved by [dialing 333-333-3333 and entering my password.] [by pressing \* 12 and entering my password on the phone in my office.] [by contacting my answering service at 333-333-3333.] My business email address is [greatattorney@greatattorney.com]. My email password can be found in my master password file [in my locked credenza in my office] [in a file in the hands of [trusted friend].]

[Include information about other important accounts, Facebook, Twitter, website and passwords for protected files and accounts relevant to the practice.]

Thank you again for your assistance.

Sincerely,