

Information for the Attorney Who Has Been Designated as a Successor, Caretaker or Closer of a Law Practice

The Successor Attorney designated to manage or close another attorney's office will face myriad responsibilities, some of which will require immediate action. Where a detailed plan is in place (as described in the guidelines in Chapter 3 for designating a successor), the job of the Successor Attorney will be easier. If no such plan is in place, the "Checklist for Closing Another Attorney's Office" and the checklists for concerns when assuming responsibilities of another attorney's practice and the sample letters and forms regarding notification to clients and transfer of files will be helpful to you. The "Checklist for Lawyers Planning to Protect Clients' Interests in the Event of the Lawyer's Disability, Impairment, Incapacity or Death" and Chapter on Closing Your Own Office also may be useful for the Departing Attorney to review prior to designing his or her own Advance Exit Plan and to ensure that the issues raised in those checklists are dealt with in the plan the attorney develops.