

Retirement Planning Materials

Available from the Law Practice Management Resource Library

The publications below provide more thorough and comprehensive information to help you plan for your retirement.

Disclaimer: These materials are intended as general educational resources. While they are from reputable sources, they have not been reviewed for compliance with all applicable Georgia Rules of Professional Conduct. Please consult the State Bar's Ethics Hotline at 800-682-9806 if you need additional information.

- **101+ Practical Solutions for the Family Lawyer, Third Edition: Sensible Answers to Common Problems** by Gregg Mark Herman (2009)
- **The ABA/AARP Checklist for Family Caregivers: A Guide to Making It Manageable** by Sally Balch Hurme (2015)
- **ABA/AARP Checklist for My Family: A Guide to My History, Financial Plans and Financial Wishes** by Sally Balch Hurme (2015)
- **Compensation Plans for Law Firms, Fourth Edition** by James D. Cotterman (2004)
- **Compensation Plans for Law Firms, Fifth Edition** by James D. Cotterman (2010)
- **Compensation Plans for Law Firms, Sixth Edition** by James D. Cotterman (2015)
- **Elder Law and Later-Life Legal Planning** by Lawrence A. Frolik (2017)
- **Employee Benefits Law: The Essential Cases** by Sharon Reece and Max D. Siegel (2014)
- **Estate Planning Strategies: A Lawyer's Guide to Retirement and Lifetime Planning** by Jay A. Soled (2002)
- **The Fulfilled Lawyer** by Kathleen Heather Paukert (2014)

- **Law & ReOrder: Legal Industry Solutions for Restructure, Retention, Promotion & Work/Life Balance** by Deborah Epstein Henry (1999)
- **Law Partnership, Second Edition: Its Rights and Responsibilities** by George H. Cain (1999)
- **Law Partnership Revisited** by George H. Cain (2002)
- **Lawyer Interrupted: Successfully Transitioning from the Practice of Law—and Back Again** by Amy Impellizzeri (2015)
- **Lawyers at Midlife: Laying the Groundwork for the Road Ahead** by Michael Long, John Clyde, and Pat Funk (2009)
- **The Lawyer’s Guide to Buying, Selling, Merging, and Closing a Law Practice** by Sarina A. Butler and Richard G. Paszkiet (2008)
- **A Lawyer’s Guide to Estate Planning, Third Edition: Fundamentals for the Legal Practitioner** by L. Rush Hunt and Lara Rae Hunt (2004)
- **A Lawyer’s Guide to Estate Planning, Fourth Edition: Fundamentals for the Legal Practitioner** by L. Rush Hunt and Lara Rae Hunt (2018)
- **The Lawyer’s Guide to Financial Planning** by Cynthia Sharp (2014)
- **The Lawyer’s Guide to Succession Planning: A Project Management Approach for Successful Law Firm Transitions and Exits** by John W. Olmstead (2016)
- **The Lawyer’s Retirement Planning Guide** by Susan Berson (2010)
- **Life After Law? What Will You Do With The Next 6,000 Days?** by Edward Poll (2013)
- **Modern Rules of Personal Finance for Professionals** by Susan A. Berson (2008)
- **Passing the Torch Without Getting Burned: A Guide to Law Firm Retirement and Succession Planning** by Peter A. Giuliani (2013)
- **Personal Finance for Professionals** by Susan Berson (2015)

- **Selling Your Law Practice: The Profitable Exit Strategy** by Edward Poll (2005)
- **Turning Points: New Paths and Second Careers for Lawyers** by George H. Cain (1994)
- **Turning Points, Volume II: New Paths and Second Careers for Lawyers** by George H. Cain (2009)
- **Understanding Elder Law: Issues in Estate Planning, Medicaid and Long-Term Care Benefits** by L. Rush Hunt, Patricia Day, and Michael McCauley (2002)
- **Withdrawal, Retirement & Disputes: What You and Your Firm Need to Know** by **Lowell E. Rothschild** and Edward B. Berger (1986)

SAMPLE FORMS AVAILABLE:

The following *Closing Your Law Practice* forms are available on the Bar website at www.gabar.org under *Attorney Resources/Practice Management/Sample LPM Forms*. Call the LPM Department at 404-527-8772 if you have any questions about downloading these forms and request for other practice management specific forms.

acknowledgement of receipt of file form	last will single with minor children no trust*
agreement to close law practice-full form	law firm master list of contacts form
agreement to close law practice in the future	letter advising that lawyer is closing his or her practice
agreement to consent to close law practice form-short form	letter from firm offering to continue representation
authorization and consent to close law office	letter of understanding
authorization to transfer of client file form	limited power of attorney to manage law practice at a future date
authorization to return or destroy files letter	living will-Georgia specific*
checklist of concerns when assuming responsibility for another attorney's practice-purchase or acquisition form	notice of designated successor lawyer form
checklist of concerns when assuming temporary responsibility for another attorney's practice-disability or suspension	power of attorney-limited agreement form
checklist for closing your own office	power of attorney for life insurance information-short form*
checklist for lawyers planning to protect clients' interests in the event of the lawyer's disability, impairment, incapacity or death	request for file form
checklist for the fiduciary of a sole practitioner	security deed-Georgia specific*
confidentiality and non-disclosure agreement for use in sale or transfer of a law practice*	special provisions for attorney's will-instructions regarding my law practice form
contingency fee agreement with succession planning clause form*	specimen signature of attorney-in-fact form
engagement letter and fee agreement to follow-up letter to initial review*	succession planning form by the State Bar of Georgia
hourly litigation fee agreement with succession planning clause form*	timeline for closing your law practice
last will married with no children*	what if-answers to frequently asked questions about closing a law practice on a temporary or permanent basis*
last will married with adult children*	what to do when your boss or relative is no longer able to practice law: a checklist for staff and family members*
last will married with minor children*	will provisions
last will single with adult children*	wills and trust consent and form notification-attorney as executor*
last will single with minor children including trust*	withdrawal from representation forms

**Please contact Law Practice Management to order forms.*