

PLANNING LAWYER CHECKLIST FOR MANAGING YOUR LAW PRACTICE TO FACILITATE THE TASK OF THE REPLACEMENT LAWYER

Current as at October 2014

Consider taking the following steps to prepare your law practice for the entry of a Replacement Lawyer.

- Have a system in place for the opening, closing and destruction of client files and ensure that this system is followed.

Resources

- [File Management Practice Management Guideline](#)
 - [Guide to Retention and Destruction of Closed Client Files for Lawyers](#)
- Have a complete client list with contact information that can be produced at any time.
- Document your files well so that the Replacement Lawyer reviewing the file will know what has transpired in the file.
- Confirm your retainer in writing with the client and have a copy of the retainer agreement or correspondence in the file. Also consider inserting a provision in your retainer agreement with the client indicating your arrangement with the Replacement Lawyer to manage or dispose of your law practice in the event of your death, disability or unexpected absence from your law practice.

Resources

- [Retainer Agreement or Engagement Letter](#)
 - [Sample Retainer Agreements](#) (LawPRO)
- Have a conflict checking system in place and keep it up to date.

Resources

- [Selecting a Conflict Checking System](#)
 - [Managing Conflict of Interest Situations](#) (LawPRO)
- Have a tickler or reminder system in place and keep it up to date.

Resources

- [Time Management Practice Management Guideline](#)
- Keep your bookkeeping and accounting records up to date.
- Keep your time and billing records up to date.

Resources

- [The Bookkeeping Guide for Lawyers](#)
- Prepare a law office procedural manual outlining the key processes in your law firm and

important information about your firm and keep it up to date.

Resources

- [Practice Tips – Preparation of a Law Office Procedural Manual](#)
- Have a contingency plan in place and periodically review and update the plan.
- Ensure that you have sufficient funds available to the Replacement Lawyer to cover office overhead and expenses for a period of time. Note that a line of credit issued to a lawyer may not be used to advance funds after the lawyer's death or disability.
- Discuss with your bank or determine what happens to your bank accounts, line of credit and other loans if you die or become disabled.
- Consider all types of insurance, including: professional liability insurance coverage, property insurance (if you own your building); contents insurance, including extra riders for computers or other equipment of significant value; commercial general liability for third-party bodily injury or property damage; business interruption insurance; crimes coverage; and disability, life, or other appropriate personal coverage. With respect to professional liability insurance, consider whether the standard \$250,000.00 LAWPRO run-off coverage is sufficient or whether it should be increased with Optional Run-off Buy-up coverage in the event that you pass away and discuss this with your Estate Trustee for the Law Practice.