**Succession Planning Quick Hit**

Succession planning need not be burdensome. A few small steps now go a long way.

1. Find someone—preferably another attorney--to close your practice if you cannot.
2. Discuss with that attorney what they will do—the bare minimum or all that is needed?
3. Consider putting in place an agreement with that lawyer—see sample agreements, one short form; one inclusive of winding down all parts. Need checklist for what lawyer will do.
4. If you have a trust account, arrange for someone else to be an authorized signer. (What form is needed here—Limited POA, springing?)
5. Provide client notice in retainer agreement of plan. (Sample retainer agreement language?)
6. Make sure your files are up-to-date and there is a listing of current clients with contact information. (checklist of how to access info?)
7. For solo practitioners—make sure you have a will that authorizes a PR to wind down law office business. (Are there particular will provisions that we recommend?)
8. Avoid keeping original client documents after representation ends, particularly wills and trust documents or property deeds. Return those to the client upon the conclusion of the representation.
9. Provide the individual selected in #1 with key information. (See form with where client names and addresses are, bank account info and computer passwords, etc.).

Forms Needed:

(1) Agreement to Close Office (short form and long form)

(2) Retainer agreement sample language

(3) Sample will provisions

(4) Limited, springing POA to access trust account, etc.?

(5) Fill-in-blank form with important info

(6) Checklist for closing attorney.