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WHO'S NEXT? STRATEGIC SUCCESSION PLANNING FOR LAW FIRMS SPEAKER BIOGRAPHIES

Kerri C. Riley, Moderator

Los Angeles, CA

Kerri C. Riley serves as the global head of conflicts at Quinn Emanuel Urquhart & Sullivan, where she oversees all aspects of the firm's new business and conflicts processes. She ensures the firm maintains the highest standards of ethics and compliance in evaluating and resolving potential conflicts of interest, managing new business intake, and facilitating the clearance and onboarding of lateral attorneys. Additionally, Riley serves as a firm-wide resource on issues of professional conduct and adherence to regulatory requirements across various regions.

Prior to joining the firm, Riley led the business acceptance department at another international law firm. Before that, she investigated and prosecuted disciplinary and civil matters arising out of attorney ethics and regulation for the State Bar of California.

Riley currently serves as a member of the Committee on Professional Responsibility and Conduct, which drafts advisory ethics opinions, advises the State Bar Board of Trustees on professional responsibility, and sponsors educational and outreach programs.

Amber Bevacqua-Lynott

San Diego, CA

Amber Bevacqua-Lynott is of counsel in Buchalter's Portland, San Diego, and Seattle offices. She is the co-chair of the firm's Professional Responsibility Practice Group and a member of the Litigation Practice Group. Bevacqua-Lynott provides guidance and legal representation to attorneys, licensed professionals, and other business clients, including firms and in-house legal departments. Her practice centers on legal ethics, risk management, and discipline defense. She acts as outside counsel to clients in a variety of industries, providing advice and counsel on all manner of ethics issues, including conflicts, confidentiality, malpractice, risk management, and fee issues.

In addition, Bevacqua-Lynott represents lawyers, students, and other professionals in front of regulatory authorities and bar associations on licensing, admissions, reinstatement, reciprocity, character and fitness, consumer protection, unauthorized practice of law, and disciplinary matters.

Bevacqua-Lynott has more than 25 years of legal experience, including extensive civil trial experience. Prior to joining Buchalter, she worked as an assistant disciplinary counsel in the Oregon State Bar's Disciplinary Counsel's Office (DCO), where she enforced the Oregon Rules of Professional Conduct through the investigation and prosecution of alleged misconduct. During her time in DCO, Bevacqua-Lynott successfully first chaired several dozen civil trials, and she investigated or prosecuted hundreds of disciplinary matters. During the last six years

of her tenure with DCO, she was the chief assistant disciplinary counsel and deputy director of Regulatory Services, and she also acted as chief trial counsel.

Bevacqua-Lynott's years of experience both in defending and prosecuting ethical violations offers her clients a unique insight and expertise on ethics issues and professional obligations.

Danielle De Smeth

Ventura, CA

With a background that is rich in many different legal fields, Danielle De Smeth is a well-rounded, experienced attorney who has represented clients in cases involving personal injury, environmental litigation, and criminal defense. Her versatility in the courtroom is matched by her clear, direct communication style and deep understanding of legal strategy.

De Smeth brings both tenacity and practicality to every case, whether she's going up against a powerful insurance company or advocating for someone facing serious charges. Known for her trial experience and meticulous preparation, she approaches each matter with the goal of achieving the best possible result while ensuring her clients understand every step along the way.

Adam L. Pearlman

Santa Barbara, CA

Adam L. Pearlman is the owner of the Law Offices of Adam L. Pearlman, where he has practiced criminal defense since 2004, handling cases ranging from domestic violence and sexual assault to DUI and serious felonies. Before entering private practice, he served as a senior deputy district attorney in Ventura County and later trained prosecutors nationwide in trial advocacy through the National District Attorneys Association.

Pearlman earned his JD with honors from the George Washington University Law School and holds a BS in finance from the University of Southern California. He is an active member of multiple local, state, and national criminal defense and bar associations.

WHO'S NEXT? STRATEGIC SUCCESSION PLANNING FOR LAW FIRMS

ADDITIONAL RESOURCES

1. Standing Committee on Professional Responsibility and Conduct Formal Opinion No. [2024-209](#)
2. David Wood, [*Frustrated With Your Firm's Succession Planning?*](#) (2024)
3. Erin Brereton, [*The Softer Side of Succession Planning*](#) (2024)
4. Standing Committee on Professional Responsibility and Conduct [Proposed Interim Formal Opinion No. 21-0003](#) (circulating for public comment with a deadline of May 7, 2026)
5. Colleen Cochran, [*Demographics as destiny: Making the case for the law firm diversity and inclusion*](#) (2021)
6. [American Bar Association Succession Planning](#) (website)
7. [*Succession Planning for California Attorneys: A Law Practice Guide*](#), The State Bar of California



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Who's Next? Strategic Succession Planning for Law Firms

Kerri C. Riley, Quinn Emanuel Urquhart & Sullivan LLP
Adam Pearlman, Law Offices of Adam L. Pearlman
Danielle De Smeth, Bamieh & De Smeth PLC
Amber Bevacqua-Lynott, Buchalter LLP



29th Annual Statewide Ethics Symposium, April 17, 2026

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Presenters

Danielle De Smeth

Bamieh & De Smeth



Adam L. Pearlman

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Amber Bevacqua-Lynott

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Moderator

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Agenda

Introduction & Why This Matters

- I. What Are We Planning For?
- II. The Ethical Obligations: California and Beyond
- III. Client Relationship Transitions: The Hardest Part
- IV. Identifying & Developing Future Leaders
- V. What a Plan Actually Looks Like
- VI. Q&A & Close



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Introduction

Why This Matters

- Inevitability in both leadership and practice
- Good business but also an ethical obligation
 - [COPRAC Formal Opinion No. 2024-209](#)
 - Mandated in some jurisdictions.
- Mid-size firms, more so than their BigLaw counterparts, have a tendency to neglect succession planning.
 - In a 2018 [Thomson Reuters](#) survey, only 37% of mid-size firms said they had a formal succession planning process, and only 40% said they felt prepared to deal with partner retirement. That can create trouble, particularly when top leaders retire.



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Introduction

Why This Matters

Jeanine Donohue, ["To Retire Or Not? That Is The Question."](#) *Above the Law* (2026)

According to the ABA:

- The median age of lawyers practicing in the U.S. is 46, compared to 42.1 for all U.S. workers
- Out of the 386 occupations evaluated by the U.S. Bureau of Labor Statistics, lawyers rank among the oldest—only surpassed by farmers.
- 13% of lawyers — about 1 in 8 — are 65 or older, whereas only 7% of all U.S. workers fall into that age group.



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What Are We Planning For?



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What Are We Planning For?

- Planned departures: retirement, voluntary step-downs, planned leadership transitions
- Unplanned departures: illness, death, sudden resignation
- Leadership succession: managing partner/CEO, GC, practice group leaders



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What Are We Planning For?



- Firms often have a small group of partners who control a disproportionate share of client relationships and business. When they leave without a plan, firms can unravel quickly.
 - David Wood's "[Frustrated With Your Firm's Succession Planning?](#)" (2024)
- Client protection is at the center – clients need to know their matters are in good hands regardless of what happens to their relationship attorney.



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The Ethical Obligations: California and Beyond



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Regulatory Landscape & CA Considerations

COPRAC Formal Opinion No. 2024-209

- New Mexico: mandatory written succession plan for every lawyer in private practice, annual certification of compliance required
- South Carolina: "should prepare," voluntary registry, detailed written plan recommended
- Florida, Maine: require designation of a successor
- California: encourages it but does not mandate it (yet!)



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Client Relationship Transitions:

The Hardest Part



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Client Relationship Transitions



- The relationship partner often holds critical institutional knowledge that lives nowhere else
 - billing history
 - key contacts
 - unspoken expectations
 - OCGs

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Client Relationship Transitions

- Clients have a right to their counsel of choice
- Abrupt departures = malpractice, communication complaints, dropped balls
- Identify who understands the clients business/key leadership/challenges
- Actively mentor the successor early, slowly transition responsibility
- Framing it as for the benefit of the client, not forcing someone out



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Client Relationship Transitions



If you leave here tomorrow...



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Client Relationship Transitions

When client transitions go badly.

- Secret solicitation
- Breach of fiduciary duties
- Taking physical files or information
- Malpractice by abandonment
- Holding files hostage
- Failures to communicate



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Client Relationship Transitions

- Pick an age where conversations are required to start happening to remove the personal aspect
 - [Attorneys at Steptoe LLP fill out a series of career-related questions when they reach a certain age, which are embedded in the online performance planning form the firm distributes annually.](#)

"If there's no progression plan, all the power [can] rest with people who are only thinking two or three years out. They're going to make decisions to maximize today's income at the expense of the future firm. You want your leadership always thinking, what's going to happen five years from now? How are we best situated to meet the future?"



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Identifying & Developing Future Leaders



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Identifying & Developing Future Leaders



- **Intentional Leadership Development**

- Start before they're ready – bring interested people in early and often



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Identifying & Developing Future Leaders

- **Characteristics:**

- Managing Partner/Executive Committees: business minded, cheerleader, decisive without being reckless
- Practice Group Heads: respected in the field, shares/collaborative
- General Counsel: knowledgeable, reachable/communicative, trusted, "watches the watchers" – speaks truth to power



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Diversity & Succession Planning



- Colleen Cochran, [Demographics as destiny: Making the case for law firm diversity and inclusion](#), *ABA Journal* (2021)
- Client-tendered requirements for diversity – need to ensure that firms are developing the next generation of leaders to continue to support client-driven metrics

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Finding the Right Person (or Not)



- Finding a successor
- vs.
- closing down your practice and exiting gracefully



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What a Plan Actually Looks Like

Building & Implementing Succession Plans

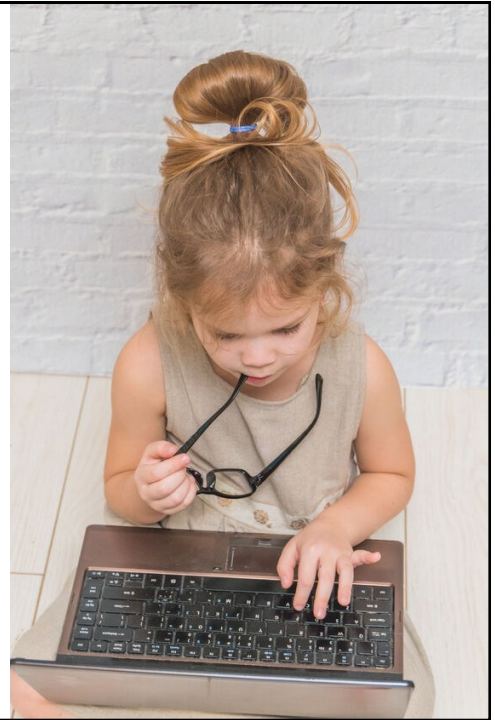


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What a Plan Actually Looks Like

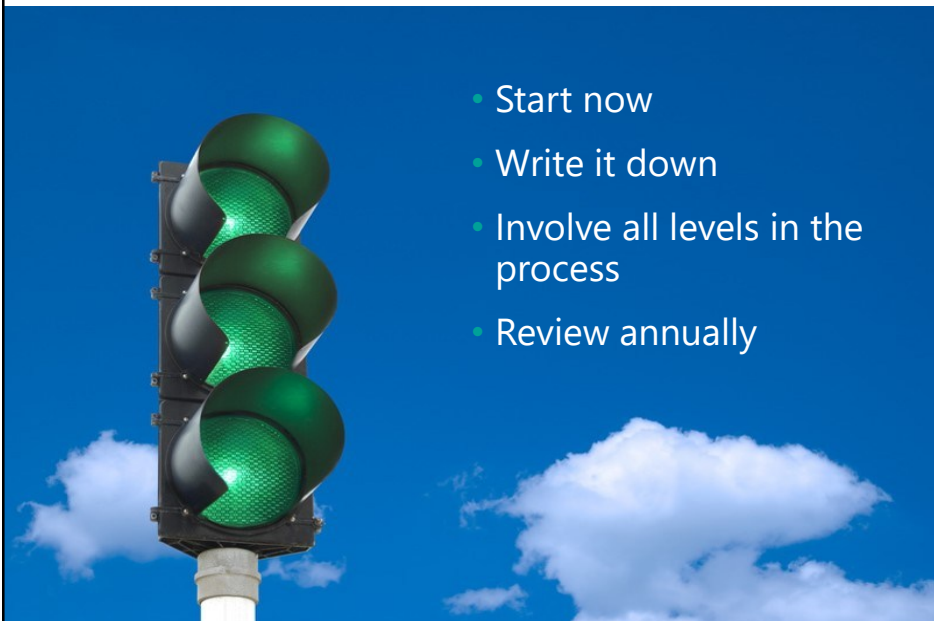
- Goal/Mission Statement
- Accurate and maintained job descriptions for each role being transitioned
- Shadowing/overlap mentor period
- Staggered transition dates (e.g., keep the prior GC and COO in place when a new managing partner starts)
- Timeline and selection criteria
- Diversity goals
- Emergency plans
- Process for client relationship succession
- Where critical files and records are stored – even less critical, like Agency Billing Platform passwords for the State Bar!



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Takeaways

- Start now
- Write it down
- Involve all levels in the process
- Review annually



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Remaining Questions?



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