SUCCESSION PLANNING CHECKLIST FOR PLANNING ATTORNEY

1. **Designate an Assisting Attorney, Authorized Signer, and/or Emergency Practice Coordinator**
   - Identify and confirm an attorney willing to manage and/or close your practice.
   - Forms to Use:
     - *Notice of Designated Assisting Attorney*
     - *Notice of Designated Authorized Signer* (if authorizing for client trust accounts)
     - *Notice of Designated Emergency Practice Coordinator* (if applicable)

2. **Formalize the Succession Planning Agreement**
   - Execute the appropriate agreements listed in *Step 1* with any necessary designees (i.e., Assisting Attorney, Authorized Signer, and/or Emergency Practice Coordinator).
   - Complete the Succession Planning Agreement with all relevant parties.
   - If necessary, complete any additional Power of Attorney templates as you see fit.
   - Forms to Use:
     - *Succession Planning Agreement Template*
     - *Power of Attorney Documents* (if applicable)
     - *Specimen Signature of Attorney-In-Fact*

3. **Notify Key Parties**
   - Inform staff, family, and relevant parties of the succession plan.

4. **Update Your Estate Plan (if applicable)**
   - A Planning Attorney who intends to include reference to their law practice in their estate plan should consult the Probate Code regarding the appointment of a practice administrator. See Prob. Code, §§ 2468, 9764, & 17200, subd. (b)(22) & (23); Bus. & Prof. Code, § 6185. For further discussion of the role of an assisting attorney, see, e.g., Phila. Bar Assoc. Prof. Guidance Committee Opn. No. 2014-100, § III.
   - Forms to Use:
     - *Will Provisions*

5. **Client Communication Plan (Optional but recommended)**
   - Draft client letters explaining the succession plan.

6. **Organize Office and File Systems**
   - Create and maintain a document with all relevant information associated with your firm (i.e., important contact information, password manager software access, safe deposit box information, etc.)
   - Forms to Use:
     - *Law Office List of Contacts*

7. **Review Annually**
   - Confirm Assisting Attorney availability annually and update all forms as needed.
   - Refresh contact and file lists regularly.