

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.

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