

Transfer memo to file or new lawyer

Memo to: *[File, new lawyer name]*

Client Name:

File Name:

File Number:

Date:

Important to Note: *[limitation periods, appearance dates, and outstanding obligations]*

Retainer: I was retained by *[client]* on *[date]* with respect to the following:
[list all items, include original retainer letter to client or retainer agreement signed by client]

Summary: A summary of the history of this matter is as follows:
[summarize facts and history of matter to present; include details of litigation, negotiations, etc.]

Client Position: The client's position on each issue is:
[summarize the client's position on each issue of the matter, any changes, etc.]

Opposite Position: The opposing side's position on each issue is:
[summarize the opposing side's position on each issue of the matter, any changes, etc.]

Other Information: Additional relevant information about this matter includes:

[summarize any other information that may be relevant or of assistance]

File Transfer: I have transferred the file to you per *[client's instructions or sale or transfer of the practice to the new lawyer]*.

[include copy of the client's authorization/direction to the transfer of the file or, where the client could not be reached, copy of the notice of transfer sent to the client]