

## **CHECKLIST FOR DEPARTING LAWYERS**

1. Determine the status of your caseload.
2. Where applicable, determine your financial obligations with respect to office lease, equipment lease, telephones.
3. Where applicable, identify any equipment, software and other assets in which you have an interest.
4. Decide what approach to take with your firm regarding files and clients.
5. Identify clients to notify about your departure.
6. Review the client list at your new office to screen for potential conflicts.
7. Meet with your firm; agree on a departure date finalize your client notification letter.
8. Draft authorization for transfer of client file to be enclosed with notification letter to clients.
9. Mail notification letters and authorizations to clients.
10. File substitutions or withdraw as Solicitor of record on cases you will not be taking with you to your new position.
11. Prepare a memo to the appropriate partner(s) or new lawyer regarding status of files remaining with the former firm. Include information about upcoming deadlines.
12. Make arrangements with your former firm regarding mail, email and incoming calls.
13. Discuss who will retain or store your closed files. Confirm file retention policies with your former firm.
14. Meet with former firm to obtain conflict information that you can take with you to your new position.
15. Determine whether you will need to reimburse your firm in whole or in part for any professional liability coverage paid by the firm. If your firm has excess coverage, check with your excess carrier.
16. Determine whether you will need to reimburse your firm in whole or in part for any bar association dues or memberships fee paid by the firm.
17. Submit a change of address card to the post office.

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18. Prepare a change of address notice for opposing counsel, Prothonotary, vendors, etc
19. Submit new contact information with the Nova Scotia Barristers' Society.
20. Make necessary arrangements to set up trust and general accounts. Contact Glen Greencorn NSBS 422-1491 for detail of trust account requirements.
21. Prepare and mail out announcement cards about your new position
22. Sign new fee agreements with the clients you are maintaining/ transferring to your new firm.
23. Arrange for transfer of trust funds from your old firm. The trust cheque from your former firm should be accompanied by an itemization of funds being transferred, statement of trust funds and copies of the most recent billing statements sent to the clients.