

Checklist for Closing Your Own Office

- Amounts Owed from Clients (Accounts Receivable): Ensure that these balances are paid or total in the aggregate in the low four figures before you announce your intentions to anyone.
- Give notice to staff
- Cease taking new matters from new clients
- Cease taking new matters from existing clients
- Give notice of termination of any rental/lease agreements
- Give notice to clients
- Conclude active cases
- Transfer files to new lawyer
- Give files to clients
- Deal with retained files such as closed files and original wills
- Finalize accounting
- Prepare time records and list of work in progress
- Meet with Accountant
- Close accounts such as banking law firm accounts
- Client Trust Accounts (after audit)
- Deal with unclaimed funds
- Lenders
- Accounts Receivable
- Safe Deposit Box
- Notify WSBA, professional organizations, and other bar associations
- Notify Insurance Carriers such as malpractice, premises liability
- Fringe benefits such as health, life, disability
- Check with financial planner re retirement plans: IRAs, SEP, 401K
- Cancel other memberships, subscriptions
- Take down computer system
- Determine disposition of furniture, fixtures, library, art, etc.
- Notify post office, legal messengers
- Notify telephone companies and have forwarding number
- Write goodwill farewell thank you notes
- Deal with unresolved matters
- Enjoy the next steps in your path!