



Opening a New Law Firm Checklist

<p>1. Sever Any Existing Relationship</p> <ul style="list-style-type: none"><input type="checkbox"/> Advise firm of your decision<input type="checkbox"/> Advise clients of their choice of counsel<input type="checkbox"/> Wrap up/memo/transfer files<input type="checkbox"/> Transfer trust funds <p>2. Satisfy Law Society Requirements</p> <ul style="list-style-type: none"><input type="checkbox"/> Confirm your membership status<input type="checkbox"/> Update contact details<input type="checkbox"/> Apply to be designated a Responsible Lawyer <p>3. Determine Office Arrangements</p> <ul style="list-style-type: none"><input type="checkbox"/> Enter into an independent association and space share?<input type="checkbox"/> Find your own office space? To lease? Purchase?<input type="checkbox"/> Create a virtual office and work from home?<input type="checkbox"/> Find business space you can access as needed? <p>4. Acquire Software/Applications</p> <ul style="list-style-type: none"><input type="checkbox"/> Acquire practice management and trust accounting software<input type="checkbox"/> Consider options for Word processing and cloud storage<input type="checkbox"/> Consider area specific software options <p>5. Acquire Equipment and Supplies</p> <ul style="list-style-type: none"><input type="checkbox"/> Computer/laptop/printer/scanner/copier<input type="checkbox"/> Tablets/iPads for client intake?<input type="checkbox"/> Consider options for phone including VOIP<input type="checkbox"/> Purchase furniture for your office space<input type="checkbox"/> Purchase office supplies	<p>6. Acquire Insurance</p> <ul style="list-style-type: none"><input type="checkbox"/> Confirm when next ALIA payment is due<input type="checkbox"/> Property<input type="checkbox"/> Public liability/tenant's liability<input type="checkbox"/> Business interruption<input type="checkbox"/> Additional Cybersecurity<input type="checkbox"/> Staff trust misappropriation<input type="checkbox"/> Life/disability <p>7. Acquire Legal Resources</p> <ul style="list-style-type: none"><input type="checkbox"/> Research resources<input type="checkbox"/> Monthly newsletters<input type="checkbox"/> Subscribe to the LESA library<input type="checkbox"/> Obtain LESA practice manuals or a LESA Library subscription<input type="checkbox"/> Create templates and retain precedents<input type="checkbox"/> Create and retain practice area specific checklists <p>8. Arrange for Services</p> <ul style="list-style-type: none"><input type="checkbox"/> Courier<input type="checkbox"/> Process server<input type="checkbox"/> Land Titles<input type="checkbox"/> Corporate Registry<input type="checkbox"/> Surrogate and Digital Filing <p>9. Establish Client Relations Policies</p> <ul style="list-style-type: none"><input type="checkbox"/> Create retainer letters for each area of practice<input type="checkbox"/> Develop non-engagement letters<input type="checkbox"/> Consider client expectations and how you will relay these
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10. Prepare a Law Office Manual

- Outline office/personnel policies
- Outline procedures
- Outline file management system
- Outline email management system

11. Develop File Management Systems

- Create bring forward/diary system
- Create limitations system
- Create court date/deadlines system
- Determine how you will track work on files

12. Make Banking and GST Arrangements

- Once approved as Responsible Lawyer – open a general/operating account and if applicable, a trust account
- Apply for office credit card if appropriate
- Register for a GST number

13. Develop Accounting Procedures and Financial Information Systems

- Develop trust safety accounting procedures including withdrawals from trust and reviewing and signing the monthly bank reconciliations
- Develop a billing system
- Develop a system to follow up on accounts receivable
- Develop a system to capture disbursements
- Develop a system to track and ensure payables are paid

14. Announce your New Practice and Start Marketing

- To existing clients
- To new clients
- Hold an open house
- Consider advertising initiatives

15. Seek out Help

- Practice Advisor
- Trust Safety Department
- Practice Management Consultations
- Mentorship
- Assist