Retirement Schedule of Tasks

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|  | **Tasks** | **Days before Deadline** | **Due Date** | **Completed** | **Comments** |
| 1 | Prepare Master File List | 180 |  |  |  |
| 2 | Review wills and take any appropriate action | 180 |  |  |  |
| 3 | Stop accepting new files | 120 |  |  |  |
| 4 | Advise clients of retirement | 120 |  |  |  |
| 5 | Open file details | 90 |  |  |  |
| 6 | Closed file details | 90 |  |  |  |
| 7 | Review WIP & unbilled disbursements | 75 |  |  |  |
| 8 | Return original docs to clients, or address undertakings and trust conditions | 60 |  |  |  |
| 9 | Return all trust money/property to clients | 60 |  |  |  |
| 10 | Close all trust accounts, provide confirmation of closure to the Trust Safety Department | 30-60 |  |  |  |
| 11 | File final Law Firm Self-Report and Accountant’s Report or Electronic Data Upload with the Trust Safety Department | 30-60 |  |  |  |
| 12 | Provide inactive application to the Membership Department. | 30 |  |  |  |
| 13 | Submit a non-practicing disposal list to the Membership Department | 30 |  |  |  |
| 14 | Cancel email address, LinkedIn account and firm’s website, remove all firm signage & lock the door | 0 |  |  |  |