# Successor Lawyer Timeline – The First Month*\** [[1]](#footnote-1)

First Two Weeks

* Check the lawyer’s calendar for anything that is urgent and scheduled for Chambers, Questioning, trials and closings.
* Review all active files in case the calendar isn’t complete or up to date. Determine whether anyone has a list of clients with active files.
* Write to those clients to let them know their lawyer will not be able to assist them any longer and that they need to engage new counsel. Include time limitations and time frames important to their cases. Explain how and where they can pick up their files. Include a deadline for doing so.
* For cases with pending court dates, Questioning, or hearings, discuss with the clients how to proceed. When appropriate, request extensions.
* Contact courts and opposing counsel immediately where Questioning or court appearances have been scheduled. Reschedule when necessary. Confirm extensions in writing.
* For cases before administrative bodies and courts, obtain the clients' permission to file a Notice of Change of Representation.
* Open and review all unopened mail.
* Look for an office procedure manual.

Within First Month

* Arrange for clients to pick up their files. Clients should either pick up their files themselves (and sign a receipt when they do) or sign an authorization for you to release their files to their new lawyer.
* If a client is picking up their file, return original documents to them. Decide whether it is necessary or advisable to retain copies of client files.
* Tell all clients where their closed files will be stored and whom they should contact to retrieve them.

If the lawyer is a sole practitioner, ask the telephone company for a new phone number to be given out when the disconnected phone number is called. This eliminates the problem created when clients call the prior phone number and get a recording stating that the number has been disconnected.

1. \*Adapted from *Succession Planning: Preparing for the Unthinkable*, State Bar of Arizona [↑](#footnote-ref-1)