# Letter from Planning Lawyer Advising Clients that They are Closing Down Practice*[[1]](#footnote-1)\**

**[This is a sample only - modify as appropriate]**

Dear [Client]:

Re: [Matter]

I will be [retiring from the practice of law/closing my law practice]on [date] and will no longer be able to act as your lawyer after that time.

A review of my records indicates that you have the following file(s) or documents at this office:

|  |  |  |
| --- | --- | --- |
|  | 1. [file name] | [Relevant details, e.g., open file, closed file, wills, trust funds, corporate records, etc.] |

You have several choices about how to proceed now that I will no longer be able to assist you:

* I have made arrangements with [insert law firm name/Successor Lawyer’s name] to take over your files provided you agree and that they have no conflict in representing you.
* You can choose a different lawyer to take over your files. I would be happy to provide you with a list of other local lawyers who practice in the area of law relevant to your legal needs.
* You can choose to proceed without any lawyer representing you.

I am sending you two copies of this letter. Please let me know what you would like to do by indicating your choice below and returning a signed and dated copy of this letter to me. The other copy is for you to keep for your records.

Since there may be important time deadlines that can affect whether legal cases will succeed, it is imperative that you let me know your decision about a new lawyer as soon as possible so that your case is protected and there is no interruption in the handling of your files.

Once you have decided, would you also contact me as soon as possible to make arrangements to obtain your [file/files] or to provide me with instructions to forward [it/them] to new counsel, including any balance of funds remaining in trust.

Within the next [fill in number] weeks, I will be providing you with a final invoice for the work I have done on your behalf and a full accounting of the money I am holding for you in my trust account.

For many legal files, notifications of the change in solicitor must be given promptly to avoid any legal steps being taken against you. Your new lawyer can do this for you or I would be pleased to assist you in this regard before [date]. Unclaimed trust funds will be sent to the Law Society of Alberta. Other documents that are unclaimed may eventually be destroyed.

*[For corporate records clients:]* I note that my office serves as a registered and records office for [name of company]. I cannot continue to provide this service after [date]. Please let me know where your new registered and records office will be located. A notice of change of registered and records office must be filed with the government. Your new lawyer can do this or I will be pleased to assist you in this regard before [date]. Failure to notify the government can result in the company being struck off the rolls of incorporated companies. All assets of the company would then revert to the Crown.

I look forward to hearing from you as soon as possible.

If you or your new lawyer need a copy of a closed file, please contact me to make the necessary arrangements.

I have appreciated the opportunity of serving as your lawyer. Please do not hesitate to give me a call if you have any questions or concerns.

Sincerely,

**Instructions:**

□ I would like my file to be transferred to [name of new lawyer/law firm]:

.

□ I will be retaining new counsel but am still making the necessary arrangements. I will have them contact you once they have been retained.

□ I will be proceeding without a lawyer representing me.

Client signature Date

1. \* *This letter has been adapted from a sample letter prepared by the Law Society of British Columbia.*  [↑](#footnote-ref-1)