Succession Planning for Small Firms & Solo Practitioners

Others do it and so should you!

Many lawyers have built successful practices that will provide no continuing income if they stop working. This, unfortunately, shortchanges the attorneys, their families, and their clients, who may be left searching for new counsel. Fortunately, there are now techniques to capitalize on the value of a successful practice.

This program explores options for attorneys seeking to realize the value of their practices and provide ongoing representation to their clients. The program covers the following topics, among others:

- Contingency planning for the possibility of death or disability in order to preserve the value of the business and protect clients,
- Alternative structures for law firm succession planning,
- Benefits to growing law firms by engaging in succession planning with senior attorneys,
- Malpractice coverage issues,
- Conflicts of interest,
- Client confidentiality,
- What to do with old files,
- Technology solutions,
- The future of law practice in general and,
- Overcoming inertia and the issue of lawyer identity

Agenda and written materials

- Monetize Practice; Responsibility to Clients, Family, and Self; Data
- Contingency Planning for Death or Disability
- Structuring the Succession Plan from the Perspective of the Senior Attorney and Successor Firm
- Professional Responsibility and Insurance Issues
- "Ask the Experts" Q&A Session

FACULTY

Harry S. Margolis, Esq.
Margolis & Bloom LLP, Boston, Chair

Robert M. McGill, Esq.
McGill Law Firm, Boston

Jeremy E. Poock, Esq.
Senior Attorney Match, Needham

BOSTON

9:00 a.m. – 12:00 noon,
Thursday, December 5, 2013
MCLE Conference Center,
10 Winter Place, via Winter Street
Program No. 2140174P01

LIVE WEBCAST

9:00 a.m. – 12:00 noon,
Thursday, December 5, 2013
Register at www.mcle.org
Program No. 2140174WBC

RECORDED WEBCAST

2:00 p.m. - 5:00 p.m.,
Thursday, December 12, 2013
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- $165 New lawyers admitted to law practice after 2009, pending admittees and law students

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- $125 MCLE Sponsor Members

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