

DON'T WAIT UNTIL DECEMBER TO GET YOUR PROFESSIONAL CONDUCT HOURS!

The Lorain County Bar Association
Presents

**SUCCESSION PLANNING FOR PRACTICING ATTORNEYS
AND WHAT TO DO WITH CLIENT FILES**

Featuring
Gretchen Koehler Mote, J.D., Director of Loss Prevention
Ohio Bar Liability Insurance Company

Thursday, October 3, 2018
11:00 – 1:30 p.m.
(includes lunch)

2.5 Hours of Professional Conduct

Succession planning is a multi-faceted process. This CLE will look at strategies for the future of your practice, addressing life-cycle issues and planning for continuity of client service. It will present steps to implement a succession plan for disability or death of the lawyer. Finally, it will look at what to do with all those client files. Planning ahead is key to successfully transitioning your practice. This CLE will provide guidance to do that.

- 11:00-12:00 Strategies for the Future of Your Practice
 - a. Managing Life-Cycle Issues
 - b. Requirements of Practice Entity
 - c. Planning for Continuity of Client Service
- 12:00-1:00 Designating Successor Attorney in the Event of Disability or Death
 - a. Ohio Ethics Guide: Succession Planning
 - b. Dealing with Closed Client Files
 - 1. Ohio Ethics Guide: Client Files
 - 2. Confronting the Closed File Backlog
 - c. Completing the Succession Plan for Disability or Death
- 1:00-1:30 What to Do with Client Files

COST: LCBA Member \$75.00
Non-Member \$100.00

Lorain County Justice Center
Jury Assembly Room
225 Court Street, 1st Floor
Elyria, OH 44035

Mail Registrations to: LCBA
627 Broad Street
Elyria, OH 44035
Call for Credit Cards** 440-323-8416

***A \$5 surcharge will be added for payments made by credit/debit cards. Cancellation Policy: Individuals canceling up to 48 hours prior to the date of the seminar will be issued a credit for attending a future seminar. Those not attending or those leaving early will receive the course materials in full consideration of the seminar fee paid.*



Succession Planning

NAME: _____

COMPANY: _____ PHONE NUMBER: _____