

APPENDIX O

LETTER FROM PLANNING ATTORNEY ADVISING THAT LAWYER IS CLOSING HIS/HER OFFICE

Re: [Name of Case]

Dear [Name]:

Please be advised that as of *[date]*, I will be closing my law practice due to *[provide reason, if possible]*. I will be unable, therefore, to continue to represent you in your legal matter(s). I recommend that you immediately retain new counsel to handle your matter(s). You may select any attorney you wish, or I would be happy to provide you with a list of local attorneys who practice in the area of law relevant to your legal needs to the extent that I can. Also, our local bar association [phone number] and the New York State Bar Association [phone number] provide lawyer referral services that you may utilize.

When you select your new attorney, please provide me with written authority to transfer your file(s) to [him/her]. If you prefer, you may come to our office and pick up [a copy/copies] of your file(s), and deliver [it/them] to your new attorney. In either case, it is imperative that you obtain a new attorney as soon as possible, and in no case later than [date], so that your legal rights may be preserved. *[Insert appropriate language regarding time limitations or other critical time lines of which the client should be aware.]*

I *[or: insert name of the attorney who will store files]* will continue to store my copy of your closed file(s) for seven years. After that time, I *[or, insert name of other attorney if relevant]* may destroy my [copy/copies] unless you notify me forthwith in writing that you do not want me to follow this procedure. *[If relevant, add: If you object to (insert name of attorney who will be storing files) storing my [copy/copies] of your closed file(s), please let me know immediately and I will make alternative arrangements.]*

If you or your new attorney need [a copy/copies] of your closed file(s), please feel free to contact me.

Within the next [fill in number] weeks I will provide you with a full accounting of your funds in my trust account, if any, and of fees you currently owe me.

You will be able to reach me at the address and phone number listed on this letter until [date]. After that time, you or your new attorney may reach me at the following phone number and address:

[Name]

[Address]

[Phone]

I appreciate the opportunity of having provided you with legal services. Please do not hesitate to give me a call if you have any questions or concerns.

Thank you.

Sincerely,

[Attorney] [Firm]