

Message from the Chair

Trying to Help with Transitions

Dear Section Members:

The focus of the Senior Lawyers Section for this bar year is on helping our members transition into a senior status. In the Spring/Summer edition of this publication I introduced an article written by Stephen Gallagher that discussed lawyer well-being as senior lawyers transitioned their lives. He was NYSBA's first director of law office economics and management, 1990-2003. Stephen's article addressed the appropriateness of our Section looking at this issue of senior lawyers in transition. He helped me to focus on the fact that our Section has many solo and small firm attorneys who are also members of the General Practice Section. We started conversing, emailing, sharing ideas for programs that could help senior lawyers. We broached the subject of an even larger section of NYSBA, the Young Lawyers Section, that is made up of lawyers transitioning into the practice of law. Was there a commonality in these two transitions? Should we be talking to each other?



It seems to be common knowledge that for many lawyers, status and professional achievement have become inseparable from one's identity. The link becomes especially apparent when we are on the cusp of retirement; as we look toward the future, it is only natural to ask, "Who will I be when I am no longer a lawyer?" (See Stephen Gallagher and Leonard Sienko's article of that same name elsewhere in this publication.) I didn't really think about how my practice would change as I grew older. Like most attorneys I knew, I didn't plan what would happen to my practice. My planning was limited to financial planning. Having been in a mid-sized upstate firm, I knew that I had younger colleagues that could assist me. If I could think, they could do the heavy lifting. It really worked quite well. And I had role models to emulate in aging, in my community people like Justin Vigdor and Tony Palermo. Part of transitioning was also the opportunity to spend more time on community service and pro bono work. Support of the organized bar was always important.

Steve and I developed the concept of *Meeting of the Minds* as a series of regional "Gatherings" created by the SLS in partnership with county bar associations around the state. The goal is to connect senior lawyers looking to transition from full-time practice with younger attorneys seeking personal growth in the profession. These gatherings will bring lawyers together with a diverse group of

speakers, coaches, medical professionals, and experienced attorneys to share their success in handling life transitions.

It also seems to be broadly understood—yet rarely discussed—that everyone will need a support team to help manage certain aspects of well-being, and as we age, this need will increase steadily and many of us will become caregivers for our loved ones. All of us need close family connections whenever available. If these are not possible, we can hope to find intimate friendships or form wider community connections. The planning committee for the upcoming *Gatherings* wants to explore what role the bar associations have in helping lawyers prepare for this aging workforce.

I informally explored this idea at the Section Leaders Conference in May and at the Sections Caucus in June at the Cooperstown House meeting. It got support from leadership at NYSBA's Young Lawyer Section and the General Practice Section. We attended meetings of both those Sections in spring/summer to further the discussions. Our Section hired Steve to plan the curriculum and develop the segments.

We decided to form our first "Gathering" in Rochester as a partnership between NYSBA's Senior Lawyers Section and the Monroe County Bar's Young Lawyers Section and Senior Lawyers Committee. We also invited regional Senior Lawyers Section members to join this community. We started with a half-day CLE that will be followed by regular conference calls, and other future in-person events. Going forward we want to involve NYSBA's General Practice Section, which works with small firms and solos and has an active blog. This is not Senior Lawyers Section members trying to help Young Lawyers Section members find jobs. Rather that we can share with each other experiences we have had that brought meaning to what we do. Young Lawyers Section members could help demystify technologies that stress seniors. Senior Lawyers Section members can share their passion for the rule of law. The legal profession is known to be one of high stress. Both the state bar and local bars have multiple programs and services to help members cope (Lawyers Assistance Program, Health & Well-Being, Lawyers Concerned for Lawyers). Senior lawyers may seek coaching on how to transition and what to transition to. Some are ready to hang the shingle up but want guidance on what to do with the rest of their lives. There are attorneys in firms where the firm wants them to retire to make room for younger attorneys with growing practices. They may want help in setting up a part-time practice. This time can be an opportunity for them to give back to the profession and increase access to justice. Community service boards are always looking for new volunteers. Or maybe more time to travel and learn, or just spend time with your grandchildren. The communities

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we are talking about creating need to be a support system with practical advice for transition/succession planning.

The first Gathering held in early October got great reviews from attendees. The seniors in attendance loved the format of programming followed with breakout groups to discuss and comment on each program section. It was like their first opportunity to talk with contemporaries about transitioning. We have heard from NYCLA and the City Bar about an interest in holding joint gatherings with NYSBA. If you want to see the short videos and materials go to the NYSBA website (www.nysba.org), Sections & Committees, Senior Lawyer Section, then click on the Meeting of the Minds link on the left column.

The plan for the Annual Meeting in New York City is to hold a symposium on Thursday, January 17, from 10 to

12 at the Hilton with invited speakers, including bar leaders, bar executives, those involved in Lawyers Concerned for Lawyers to come and speak, and invite Senior Lawyers Section members to attend. The program will include a roundtable discussion of the Gatherings being held by this Section, joint with all co-sponsoring entities including local bar associations, Young Lawyers Section and the General Practice Section. We do not want to overlook key Section and committee leaders who may share this same interest. We want to reach out to the courts, the law school community, and any health care providers who share our concerns about the aging legal workforce and the future of the profession.

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