New Law Firm Setup Checklist



INITIAL STRATEGIC PLAN

Vision	
Expectations	
Initial members	
Key personnel	
Client considerations	
Selection of consultants	
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FINANCIAL PLAN

Income	
Operating expenses	
Cash flow	
Financing needs	
Draw requirements	
Capital policy and capital contributions	



INANCING	
Bank application	
Personal financial statements	
Loan negotiation	
Commitment letter	
Collateral requirements	
Temporary operating funds	
accounts	

OFFICE SPACE	
Lease consultant/broker	
Space requirements	
Location	
Build out	
Timing	
Temporary space if needed	

LLC OR OTHER ENTITY CREATION	
Formation documents	
Tax ID numbers	
Operating agreement	
Compensation agreements	
Management structure	
Legal and Tax support	



FINANCING PERMANENT

- Permanent notes
- Transfer funds to new firm

Regular banking from new firm

New Law Firm Setup Checklist



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WEBSITE DEVELOPMENT	
Web Designer	
Domain name	
Logo development	
Hosting	
Basic site plan	
Content generation	

INSURANCE & BENEFITS	
E&O	
CGL, Non owned auto, EPL, Cyber	
Health, life and disability	
Key man	
Fiduciary	
401 K /Pension	

HR POLICIES AND PROCEDURES	
Payroll services	
HR manual	
Leave and holiday policies	
New employee packets	
HR responsibility	
HR consulting support	

IT AND SOFTWARE

	
Phone and internet	
Hardware and network	
requirements	
Document management	
Time and Billing	
Research support	
Data transfer requirements from	
former firms	
IT support and consulting	

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OFFICE EQUIPMENT AND	
FURNITURE	
Phone systems (Included with IT)	
Copier/print/scanners	
Office furniture	
File cabinets	
Virtual office allowances	

OFFICE SUPPLIES	
Business cards	
Letterhead templates	
Office supplies	
Vendor relationships	
Kitchen supplies	

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CLIENT COMMUNICATIONS	
Ethics considerations	
Method and timing	
Client letters	
Paper and digital file authorizations	
Motions to substitute counsel	
Time and billing	

LAWYERS AND STAFF EMPLOYEES

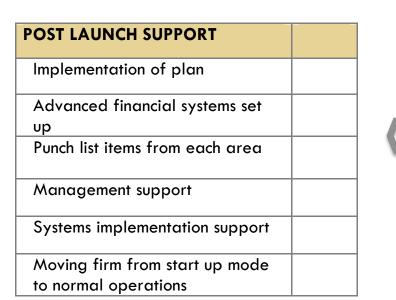
Timing and offers

Bonus plans

Seniority in new firm

Staff assignments

Staff and lawyer training for new systems



LOGISTICS	
Moving support	
Delivery coordination	
Occupational license	
Announcements	
File moving and intake	



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