

New Law Firm Setup Checklist



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



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



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



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



FINANCING PERMANENT	
Permanent bank accounts	
Permanent notes	
Transfer funds to new firm	
Regular banking from new firm	



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

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



IT AND SOFTWARE	
Phone and internet	
Hardware and network requirements	
Document management	
Time, billing and accounting	
Research support	
Data transfer requirements from former firms	
IT support and consulting	



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



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



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



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	



POST LAUNCH SUPPORT	
Implementation of plan	
Advanced financial systems set up	
Punch list items from each area	
Management support	
Systems implementation support	
Moving firm from start up mode to normal operations	

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



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504.858.7428