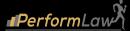
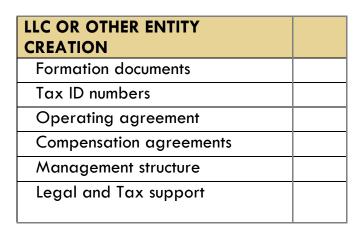
New Law Firm Setup Checklist

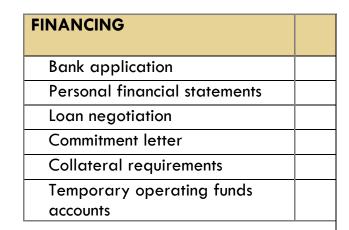




INITIAL STRATEGIC PLAN	
Vision	
Expectations	
Initial members	
Key personnel	
Client considerations	
Selection of consultants	

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





FINANCING PERMANENT	
Permanent back 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	

New Law Firm Setup Checklist





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, billing and accounting	
Research support	
Data transfer requirements from former firms	
IT support and consulting	

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	

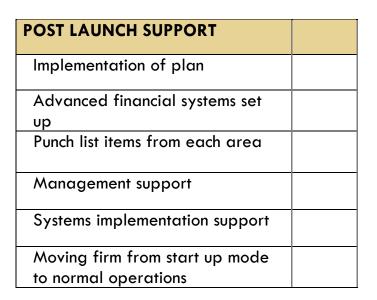
New Law Firm Setup Checklist

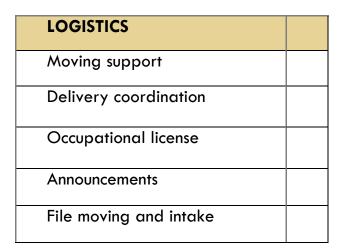




CLIENT COMMUNICATIONS	
Ethics considerations	
Method and timing	
Client letters	
Paper and digital file	
authorizations	
Motions to substitute counsel	
Time and billing	

LAWYERS AND STAFF EMPLOYEES	
Timing and offers	
Bonus plans	
Seniority in new firm	
Staff assignments	
Staff and lawyer training for	
new systems	







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