



NEW LAW PRACTICE // NEW OFFICE CHECKLIST

OPENING DAY

CATEGORY	DESCRIPTION	Deadline Date	Date Completed	Person Responsible	One-time Start-up Cost	Estimated Monthly Recurring Cost	Estimated Annual Recurring Cost
BUSINESS PLAN	Draft a business plan, including budget pro forma. Review the business plan with an accountant, or someone you know who has gone through the process of starting up a professional service business. For appropriate free samples and instruction, visit the PRI website, view the free PRI CLE on-line video "Developing a Business Plan for the Start-up Law Firm," go on-line to www.sba.gov or www.floridasbdc.org , or visit on-line at public libraries. Consider purchasing "Creating a Business Plan" from the ABA Store. ABA Discount Code is FLBAR. www.americanbar.org						
CHOOSE YOUR ENTITY	Refer to F.S. 620 & 621. Read article on the PRI website "What Entity Should I Choose for My Law Firm" and discuss with an accountant the tax consequences of each entity. Obtain FEIN at www.irs.gov . Free incorporation forms are						

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	available at www.sunbiz.org .						
ENTITY SETUP	TFB members can incorporate first time for free at www.corporatecreations.com . Mention coupon code: FLbarmember to take advantage of this benefit! Please write to FLbarmember@corpcreations.com or call (561) 694-8107 and speak with the account manager for Florida Bar members.						
	New firms of more than one lawyer need a shareholder/partnership agreement, by-laws, and buy-sell agreement. Free sample forms are available in the PRI Administrative Forms Handbook on-line.						
	Occupational Licenses. Obtain county and municipal occupational licenses from the tax collector's office (certain counties and municipalities do not require this, so check to be certain).						
	Register with the Florida Department of Revenue. See www.myflorida.com/taxonomy/business . And also: http://dor.myflorida.com/dor/businesses/ .						
LOCATION	Virtual office or traditional office, or both? Your reasons for the type(s) of office(s) you will maintain are also a part of the business plan. Home offices may require submitting an application to your local planning and zoning						

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	board. Acquire a post office box (the most secure way to receive mail for your law practice). Set up a postage account with USPS.com (or similar).						
FINANCIAL MANAGEMENT & BANKING	If you need help with law firm financial management, view the PRI video “Law Firm Financial Management for the Non-Financial Professional” and/or purchase “Results-Oriented Financial Management” from the ABA. ABA Discount Code is FLBAR.						
	Set up a chart of accounts (see the PRI Administrative Forms Handbook on-line). Establish a schedule for preparation of monthly statements and account reconciliation.						
	Choose accounting and billing software (see Technology below).						
	Select a bank and open operating and trust accounts. Determine need for safe deposit box. Be certain that trust account is properly enrolled in IOTA/Bar Foundation. Forms are on the PRI website. Review Chapter 5 of RRTFB and view PRI video “Maintaining a Trustworthy Trust Account.” See TFB Member Benefits for Merchant Card services. Firms with two lawyers or more require a written trust account plan. A sample plan and additional information are on the PRI website.						

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	Prepare a budget! The budget is also part of your business plan.						
	If you will need a line of credit, it is expected that you will have a business plan to accompany your application.						
TECHNOLOGY	Draft a technology plan and/or view the PRI video "Technology Planning for the New Law Practice." Network with other lawyers to obtain recommendations on a local technology integrator. Define hardware start-up needs: File server, printer, fax, scanning, smart-phone, laptop, tablet, etc. E-mail PRI for up-to-date information on software needs. Select an internet service provider. Decide how you will back-up your computer data. Decide on a VOIP telephone system or whether you will use mobile phones in your new law practice.						
PRACTICE MANAGEMENT	Calendar Management. Determine process for maintaining calendar and task list. Plan to maintain a dual conformed calendar method (e-calendar and mirror backup).						
	Client Intake and Representation Forms: new client/new matter intake form (see the free on-line forms manual at the TFB PRI website), client interview/initial consultation form, representation agreements, fee agreements (flat fee or non-refundable agreement, cost and fee retainer agreements), narratives on						

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	how cases are handled, client's responsibilities, post-matter client evaluation forms.						
	Courts. Set up e-filing account.						
	Practice specific forms. Develop list of needed forms/software for your practice and where these forms can be obtained. TFB Member Benefits offers discounts on certain products.						
	Legal Research. Determine on-line subscriptions necessary. Enroll in FASTCASE free legal research on TFB's Member Benefits page.						
MARKETING & ADVERTISING	Determine advertising needs, review on-line TFB Ethics Department Advertising Manual and related ethics opinions re: advertising, office sharing, websites and signage. PRI offers on-line marketing courses.						
	Order business cards. Determine need for specialty stationary, announcements, holiday cards, thank you notes, etc.						
	Website, client newsletters, firm brochure. Network with other lawyers to obtain recommendations on website developer. Determine if you need to develop a client newsletter, blog and/or e-brochures, and if so, how soon you will need this material. See www.99designs.com and www.elance.com .						

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	Signage. If you are establishing a “brick and mortar” office, determine need for interior and exterior signage.						
MAILING LISTS	Notify vendors, bar associations and courts of physical and mailing addresses. Be certain Florida Bar member profile is up-to-date.						
EQUIPMENT & SYSTEMS	Determine need for digital copier, postage machine or internet-based postage account, etc.						
	File cabinets, file supplies (even if all files are scanned, you probably still need some physical file space for certain files and supplies). Start a master file list (or use case management software, see Technology). Develop incoming and outgoing mail procedures.						
	Maintenance & Janitorial. Determine need for office cleaning service and garbage removal.						
	Develop office supply inventory. No two offices are alike. Use a supply catalog to develop your first inventory of supplies.						
FURNITURE & ACCESSORIES	Develop list and budget. Art work, flooring, chairs (executive, secretarial, visitors), conference room furniture, reception room furniture, desks (secretaries, lawyers), credenzas, window treatments, accessories.						

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	Determine where built-ins will suffice. If a home/virtual office, create an ergonomically functional space to work.						
PRI	Remember to e-mail PRI's Practice Management Advisors and ask questions along the way!						
	Ask PRI for their recommended reading list of LPM reference material.						
PERSONNEL	If you are hiring employees for your new law practice, acquire appropriate personnel forms (e.g., confidentiality agreement, I-9 forms, W-4 forms, employment applications, interviewing guidelines, labor law manual, legal assistant office procedures handbook). If several employees, purchase ABA "Law Office Policy & Procedures Manual." See free personnel related forms on-line in the PRI Administrative Forms Handbook.						
What Else?							

NOTE: This Checklist is meant to be a basic list of to-do items when establishing a new law practice. You may need to add additional tasks for your particular situation.