**Checklist for Termination of the Representation**

After the representation for which you were retained has concluded, certain procedures should be undertaken in terminating the representation:

Take all steps which are reasonably practicable to protect the client’s interests, such as giving reasonable notice of the termination, allowing time for employment of other counsel, surrendering papers and property to which the client is entitled, and refunding any fees or expenses that have not been earned or incurred. (Rule 1.16(d).)

Ensure that you have complied with all applicable law, including local rules of court, before filing a Motion to Withdraw as Counsel of Record.

Write the client a disengagement letter, signifying that the representation has ended. See Sample Disengagement Letters.

Review the file. Make sure all client documents are returned to the client. Purge the file of any redundant or duplicate materials.

If appropriate, calendar any future deadlines in the case, such as reinscription of a mortgage, revival of a judgment, etc.

Prepare a file closing sheet. See sample form, “Checklist for Closing Files,” in the File Management Section. This form should be adapted for your particular practice. This form also should be used to record vital information regarding client records and the client’s file.

Close the file.

Generate a final invoice to the client.

Document and return all client funds held in trust and any other property, including original documents, belonging to the client.

Keep complete records of any client funds held in a trust account and other property of a client for a period of at least five years after termination of the representation. (Rule 1.15(a).)

**PRACTICE AID GUIDE:** The Essentials of Law Office Management **CHAPTER 7** Termination of the representation

Page 109