

# Issue Checklist when Beginning a New Practice

## BASICS

- Name
- Registration with LSBA
- Registration with State and Federal Courts
- Entity
- Sole Prop, LLC, etc?
- Tax ID - Get from IRS
- Bank Accounts
- Trust
- Get deposit slips!
- Operations Account
- Order Checks
- Insurance
- Malpractice
- Work Comp if necessary
- Website (WordPress/Weebly/Google Sites/etc.)
- Domain (keep it short)
- Email (keep it short)
- Hosting
- Business Cards (Do last)

## Issue Checklist for Law Office with Staff or in Partnership

- What form of business entity will your new practice be (i.e., LLC, general partnership, etc.)?
- Do you have a written agreement signed by all the partners/shareholders?
- What is your plan for partner/shareholder compensation?
- What is your plan for associate compensation?
- What number and types of support staff will you require (i.e., three secretaries, two paralegals, one receptionist, and one bookkeeper)? Will all be full-time or will some be part-time?
- How will you be compensating support staff?
- How do you plan to attract and hire needed support staff?
- What benefits will be offered to partners, associates, and support staff?
- How will the firm be managed? By a managing partner or management committee? By other means? What will the managing partner(s)' duties be? Will some of the firm's management be delegated to non-attorney personnel, such as an office manager/legal administrator? If so, which functions?
- Where are your offices going to be located? Will you be renting office space or purchasing? What amenities, if any, are included in your rent (utilities, use of existing staff, phone lines, agreement to wire premises for Internet)? Do you have a signed lease?
- How does the firm plan to fund itself in the initial stages? Personal loans, a business line of credit, capital contributions by partners, a combination of these things? Has a bank been approached with a written business plan?
- Has the firm developed a written budget and income forecast for the first year?

- Does the firm have a written marketing plan? What will be done in the first year to retain existing clients and attract new ones? Have specific plans and responsibilities been assigned? Does the marketing plan address issues such as whether growth is anticipated, and if so, how quickly the firm intends to grow?
  
- What arrangements have been made for choosing and purchasing (or leasing) the following office equipment:
  - Computers
  - Printers
  - Copiers
  - Scanners, shredders, and postage equipment
  
- What arrangements have been made for choosing and purchasing the following computer software:
  - Network operating systems
  - Desktop operating systems
  - Word processing (including office suites)
  - Timekeeping/billing
  - General ledger accounting
  - Trust accounting
  - Practice (Case) management/calendaring
  - Litigation support
  
- How will staff and attorneys be trained on office systems?
  
- Has the firm developed a policies and procedures manual for employees?