

**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
<b>BUSINESS PLAN</b>	Draft a business plan (include a budget). Review the business plan with an accountant. Download a <a href="#">free sample business plan</a> and/or review " <a href="#">Developing a Business Plan for the Start-up Law Firm</a> " use the U.S. Small Business Administration's " <a href="#">Write Your Business Plan</a> " tool; or purchase " <a href="#">The Lawyer's Guide to Creating a Business Plan, Sixth Edition A Step-by-Step Software Package</a> " from Amazon.						
<b>FL DEPT OF CORPORATIONS</b>	Refer to F.S. 620 & 621. Discuss the tax consequences of each entity with an accountant. Visit the FL DoS Division of Corporations " <a href="#">Start a Business</a> " web page for information and forms. <a href="http://www.sunbiz.org">www.sunbiz.org</a>						
<b>ENTITY SETUP</b>	<b>TFB members can incorporate the first time for free</b> at <a href="http://www.corporatecreations.com">www.corporatecreations.com</a> . Mention coupon code: FLbarmember to take advantage of this benefit! Email <a href="mailto:FLbarmember@corpcreations.com">FLbarmember@corpcreations.com</a> or call (561) 694-8107 to speak with the account manager for Florida Bar members.						
<b>EIN</b>	Apply for an <a href="#">Employer Identification Number (EIN)</a> online or visit <a href="http://www.irs.gov">www.irs.gov</a> for more information.						
<b>FIRM FORMATION FORMS</b>	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 <a href="#">Practice Resource Center's Document Library</a> .						
<b>LICENSING</b>	Obtain county and municipal occupational licenses from the <a href="#">tax collector's office</a> (some counties and municipalities do not require this).						
<b>FL DEPARTMENT OF REVENUE</b>	<a href="#">Register with the Florida Department of Revenue</a> . See also the DoR's <a href="#">New Business Start-up Kit</a> .						
<b>LOCATION</b>	Virtual office, traditional office, or both? Consider location, square footage required, parking, and accessibility. Visit our <a href="#">Office Space</a> page. Read " <a href="#">The Door to a Virtual Law Practice Is Always Open: And the Proper Use of Technology Can Keep It That Way</a> " from the June 2014 Florida Bar Journal.						

<b>ACCOUNTING NEEDS</b>	Consult with a CPA. Choose accounting and billing software. Payroll service vs. Payroll software. (Research <a href="#">all-in-one legal practice management software</a> ).						
<b>FINANCIAL MANAGEMENT</b>	For help with law firm financial management, purchase " <a href="#">Results-Oriented Financial Management</a> " from the ABA. Discount Code is FLABAR.						
<b>CHART OF ACCOUNTS</b>	Set up a chart of accounts (see the <a href="#">Practice Resource Center's Document Library</a> ). Establish a schedule for preparation of monthly statements and account reconciliation.						
<b>BANKING</b>	Select a bank and open operating and trust accounts. Determine need for safe deposit box.						
<b>IOTA TRUST ACCOUNTS</b>	Enroll trust account with The Florida Bar Foundation IOTA Program. Forms are on our <a href="#">Trust Accounting Resources</a> page. Firms with more than one attorney must have a written trust account plan. A sample plan is in the <a href="#">Practice Resource Center's Document Library</a> . Review <a href="#">Chapter 5 of RRTFB</a> and watch " <a href="#">Trust Accounts by the Book</a> " and " <a href="#">Maintaining a Trustworthy Trust Account</a> ", and " <a href="#">Trust Accounting Management Principles</a> ".						
<b>BUDGET</b>	Prepare a budget! The budget is also part of your business plan. Include all start-up and recurring expenses.						
<b>LINE OF CREDIT</b>	If you will need a line of credit, it is expected that you will have a business plan to accompany your application.						
<b>TECHNOLOGY</b>	Select computers, software, network, printers, copier. Choose an internet service provider. Decide how you will back-up your data. Select a telephone system and/or use mobile phones. Review the <a href="#">ABA Legal Technology Buyer's Guide</a> .						
<b>PRACTICE MANAGEMENT</b>	<a href="#">All-in-one legal practice management software</a> can take care of calendaring, conflict checking, time and billing, and case management. (Some packages also include accounting and payroll).						
<b>INSURANCE</b>	Obtain Professional Liability & Cyber Liability insurance. Visit the <a href="#">Member Benefits: Insurance page</a> on the TFB website.						
<b>CLIENT FORMS</b>	Sample client communications, fee agreements/letters of representation, and intake forms are available in the <a href="#">Practice Resource Center's Document Library</a> .						
<b>COURTS</b>	Set up an e-filing account. Visit our <a href="#">E-Filing Resources for Florida Lawyers</a> page for more information.						
<b>FORMS FOR AREA OF PRACTICE</b>	Practice specific forms. Consider document assembly software. Develop list of needed forms/software for your practice and where these forms can be obtained. TFB does not provide these for free. For offers/discounts on certain products, visit the <a href="#">Member Benefits: Legal Forms</a> page.						
<b>LEGAL RESEARCH</b>	Legal Research. Determine if online subscriptions are necessary. Enroll in FASTCASE for free legal research on TFB's <a href="#">Member Benefits: Legal Research</a> page.						
<b>MARKETING &amp; ADVERTISING</b>	Determine advertising needs, review TFB Ethics Department <a href="#">Handbook on Lawyer Advertising and</a>						

	<a href="#">Solicitation</a> and related <a href="#">ethics opinions</a> on advertising, office sharing, websites and signage. The Practice Resource Center has <a href="#">free marketing CLEs</a> .						
<b>PRINTING</b>	Order business cards. Determine need for specialty stationary, announcements, holiday cards, thank you notes, etc.						
<b>WEBSITE</b>	Website, client newsletters, firm brochure. Determine if you need to develop a client newsletter, blog and/or e-brochures. <a href="#">Omnizant</a> is a TFB Member Benefit that develops high quality, comprehensive websites and digital marketing services for law firms. See also <a href="https://www.upwork.com/">https://www.upwork.com/</a> and <a href="https://99designs.com/">https://99designs.com/</a>						
<b>SIGNAGE</b>	If you are establishing a brick and mortar office, determine need for interior and exterior signage.						
<b>MAILING LISTS</b>	Notify vendors, bar associations and courts of physical and mailing addresses. Be certain Florida Bar <a href="#">member profile</a> is up-to-date.						
<b>FILE MANAGEMENT</b>	File cabinets, file supplies (even if all files are scanned, you will still need some physical file space for certain files and supplies). Use case management software.						
<b>OFFICE CLEANING</b>	Maintenance & Janitorial. Determine need for office cleaning service and garbage removal.						
<b>OFFICE SUPPLIES</b>	Develop an office supply list. Use a supply catalog to develop your first inventory of supplies. <a href="#">Office Depot</a> is a TFB Member Benefit.						
<b>FURNITURE &amp; ACCESSORIES</b>	Develop a list and budget. Art work, chairs (executive, secretarial, visitors), conference room furniture, reception room furniture, desks (secretaries, lawyers), credenzas, window treatments, accessories.						
<b>PERSONNEL AND FORMS</b>	Determine support staff needs. Paralegal, legal assistant and/or receptionist. Acquire appropriate personnel forms (confidentiality agreement, I-9 forms, W-4 forms, employment applications). A " <a href="#">Law Office Policies, Proc., and Operations Manual</a> " is available at the ABA website. ABA Discount Code is FLABAR. Free personnel related forms are available online in the <a href="#">Practice Resource Center's Document Library</a> .						
<b>INVENTORY LAWYER</b>	Lawyers who practice in Florida are <b>required</b> to designate another Florida Bar member as an <a href="#">inventory lawyer</a> . Inventory lawyers take possession of the client files if their originally retained counsel cannot or will not do so.						
<b>THE PRACTICE RESOURCE CENTER</b>	Visit <a href="#">LegalFuel.com</a> . The Practice Resource Center's Practice Management Advisors are available via chat, by phone <b>866.730.2020</b> , or by email <a href="mailto:LegalFuel@floridabar.org">LegalFuel@floridabar.org</a> .						

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