

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

ACCOUNTING NEEDS	Consult with a CPA. Choose accounting and billing software. Payroll service vs. Payroll software. (Research all-in-one legal practice management software).						
FINANCIAL MANAGEMENT	For help with law firm financial management, purchase " Results-Oriented Financial Management " from the ABA. Discount Code is FLABAR.						
CHART OF ACCOUNTS	Set up a chart of accounts (see the Practice Resource Center's Document Library). Establish a schedule for preparation of monthly statements and account reconciliation.						
BANKING	Select a bank and open operating and trust accounts. Determine need for safe deposit box.						
IOTA TRUST ACCOUNTS	Enroll trust account with The Florida Bar Foundation IOTA Program. Forms are on our Trust Accounting Resources page. Firms with more than one attorney must have a written trust account plan. A sample plan is in the Practice Resource Center's Document Library . Review Chapter 5 of RRTFB and watch " Trust Accounts by the Book " and " Maintaining a Trustworthy Trust Account ", and " Trust Accounting Management Principles ".						
BUDGET	Prepare a budget! The budget is also part of your business plan. Include all start-up and recurring expenses.						
LINE OF CREDIT	If you will need a line of credit, it is expected that you will have a business plan to accompany your application.						
TECHNOLOGY	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 ABA Legal Technology Buyer's Guide .						
PRACTICE MANAGEMENT	All-in-one legal practice management software can take care of calendaring, conflict checking, time and billing, and case management. (Some packages also include accounting and payroll).						
INSURANCE	Obtain Professional Liability & Cyber Liability insurance. Visit the Member Benefits: Insurance page on the TFB website.						
CLIENT FORMS	Sample client communications, fee agreements/letters of representation, and intake forms are available in the Practice Resource Center's Document Library .						
COURTS	Set up an e-filing account. Visit our E-Filing Resources for Florida Lawyers page for more information.						
FORMS FOR AREA OF PRACTICE	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 Member Benefits: Legal Forms page.						
LEGAL RESEARCH	Legal Research. Determine if online subscriptions are necessary. Enroll in FASTCASE for free legal research on TFB's Member Benefits: Legal Research page.						
MARKETING & ADVERTISING	Determine advertising needs, review TFB Ethics Department Handbook on Lawyer Advertising and						

	Solicitation and related ethics opinions on advertising, office sharing, websites and signage. The Practice Resource Center has free marketing CLEs .						
PRINTING	Order business cards. Determine need for specialty stationary, announcements, holiday cards, thank you notes, etc.						
WEBSITE	Website, client newsletters, firm brochure. Determine if you need to develop a client newsletter, blog and/or e-brochures. Omnizant is a TFB Member Benefit that develops high quality, comprehensive websites and digital marketing services for law firms. See also https://www.upwork.com/ and https://99designs.com/						
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.						
FILE MANAGEMENT	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.						
OFFICE CLEANING	Maintenance & Janitorial. Determine need for office cleaning service and garbage removal.						
OFFICE SUPPLIES	Develop an office supply list. Use a supply catalog to develop your first inventory of supplies. Office Depot is a TFB Member Benefit.						
FURNITURE & ACCESSORIES	Develop a list and budget. Art work, chairs (executive, secretarial, visitors), conference room furniture, reception room furniture, desks (secretaries, lawyers), credenzas, window treatments, accessories.						
PERSONNEL AND FORMS	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 " Law Office Policies, Proc., and Operations Manual " is available at the ABA website. ABA Discount Code is FLABAR. Free personnel related forms are available online in the Practice Resource Center's Document Library .						
INVENTORY LAWYER	Lawyers who practice in Florida are required to designate another Florida Bar member as an inventory lawyer . Inventory lawyers take possession of the client files if their originally retained counsel cannot or will not do so.						
THE PRACTICE RESOURCE CENTER	Visit LegalFuel.com . The Practice Resource Center's Practice Management Advisors are available via chat, by phone 866.730.2020 , or by email LegalFuel@floridabar.org .						

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.