

# PLANNING LICENSEE

## 6 STEPS TO DEVELOPING A CLIENT CONTINGENCY PLAN

# 1



### Consider using the Law Society's template plan

Download and complete the Law Society's template [Client contingency plan](#) and save it somewhere secure, but accessible. Alternatively, develop your own plan or ensure your existing plan includes the required information in [By-Law 7.1](#).

# 2



### Appoint an Administrator

Identify your Administrator in the plan. Ensure they consent to the appointment. You should appoint a lawyer or paralegal you trust and consider someone with a similar practice to facilitate the efficient handling and winding-up of your client obligations.

# 3



### Provide location of and access to property

Ensure you have and maintain an [active file tracking chart](#) or other similar document that includes information on the location of and how to access open and closed files, client property, and other important records. The chart should also identify priority or urgent matters and any trust balance.

# 4



### Facilitate access to practice-related technology

List all hardware and software used in your practice and include passwords or other means to access computers, email, accounting, and electronic records or provide the contact information for person(s) who have this information.

# 5



### Provide location of and access to bank accounts

Provide details of, and access to, all trust accounts, trust funds, and any other accounts related to your professional business. Include the location of all accounting records and the contact information for accountants/bookkeepers. You should also prepare documents to facilitate such access (e.g., continuing power of attorney).

# 6



### Include any other information required to wind-up your professional business

This may include arranging physical access to your office, notifying persons with whom you hold other professional roles (e.g., trustee, attorney, guardian), arranging for the Administrator to inform the court, putting a notice on your website or social media accounts, etc.

