The Aging of the Legal Profession

Presented by:
Molly Kilmer Flood
Karyn Linn
Housekeeping:

- *6 to mute your line
- Webex controls
  - Chat
  - raising your hand
Up Next for Bar School

July 13, 1:00 pm CT
SPECIAL BAR SCHOOL SESSION:
How the new Department of Labor Overtime Rules May Affect Your Bar Association
Who are we?

• Karyn Linn
• Molly Flood
Why are we here?
Why are we here?

- **California**: In 2011, 43 percent of lawyers were 60 or older.

- **Maine**: A 2013 report found that 47 percent of the bar’s 4,000 practicing lawyers were 55 or older, with the number aged 65 or older more than doubling.

- **Texas**: The percentage of state bar members older than 65 has nearly doubled in 10 years, jumping from 8 percent in 2005 to 15 percent in 2015—with a quarter of all members 61 or older.
New Hampshire Bar Association

Members Turning 65

Year


# of Members

0 20 40 60 80 100 120 140 160 180

16 27 22 28 30 24 21 16 22 30 31 18 31 36 48 54 73 72 95 128 160 162 156 170
State Bar of Michigan

MILLENIALS
1981+, 4191, 12.1%

BOOMERS 1944-1960, 13,524, 39.0%

GEN X 1961-1980, 13,836, 39.9%

TRADITIONALISTS
PRE 1944, 3086, 8.9%
Issues of the Day

- Unique Nature of Attorney Retirement
- Cognitive Impairment
- Succession Planning
- Senior Lawyer Entities
- Role of LAP Programs
A short documentary describing one lawyer's transition out of practice after 60 years.

Details about how to access the film and discussion guide available at www.ambar.org/barservices.
Program #1: State Bar of Wisconsin

WisLAP
Wisconsin Lawyers Assistance Program
Resource: ABA Commission on Lawyer Assistance Programs
Program #2: State Bar of Georgia
What is a Practice Management Advisor?

How often have you looked at the stack of management and administrative matters on your desk and said under your breath “Man, they didn’t teach us about this in law school!” Whether it is management of trust accounts, upgrading technology, improving client service, or a host of other critical matters, lawyers are often unprepared to handle the business side of practicing law. Even if these tasks are delegated to staff, the supervising lawyer must have an adequate knowledge of the matters to properly oversee the business. Thanks to an innovative type of program at state, provincial, and local bars nationwide, this knowledge is often just a phone call away.

These bar programs, generally known as “practice management assistance programs” (PMAPs), are now at over 20 state bars and law societies in the U.S. and Canada. The programs are staffed by individuals known as Practice Management Advisors (PMAs) who are engaged or employed by state and local bar associations or law societies to help lawyers to manage their practices more effectively. Although the exact role of practice management advisors differs from state to state and province to province, all the advisors are committed to the process of increasing the quality of legal services by helping lawyers and law firms better manage their offices.

Most PMAPs share these common objectives:

1. Assisting lawyers in improving efficiency and effectiveness in the delivery of legal services;
2. Assisting lawyers in implementing systems and controls to reduce risk and improve quality in the delivery of legal services;
3. Assisting lawyers in client relations; and
4. Assisting lawyers and their office personnel in using emerging technologies to improve the delivery of legal services.

The practice management advisors are dedicated to helping lawyers help themselves, by providing resource materials and telephone consultations, offering educational programs and, in some states, conducting in-office management audits. The services are usually free, although many programs charge a small fee for in-office visits or management audits.
Program #3 Oakland County Bar Association

LOCA (Lawyers of a Certain Age) Committee

Committee Description

The OCBA is pleased to offer a committee designed specifically for members "of a certain age" to discuss their changing practices and priorities. The Lawyers of a Certain Age Committee (LOCA) is comprised of OCBA members aged 62 and over with the following priorities:

**Social** – Support and sponsor a variety of social activities that allow interaction with the larger bar association and targeted peer communities that address challenges such as isolation, family concerns and declining health;

**Transitions in Practice** - Develop and find partnerships for programs that support lawyers as they prepare or respond to transitions in their practice, whether it is from reducing their practice (full-time to part-time), going from a large firm to solo, closing a practice, planning for retirement or unexpected practice transitions such as diminished capacity or sudden unexpected incapacity; and

**Capture the Special Skills of LOCA** - Great opportunities/partnerships for Lawyers of a Certain Age to contribute their talents as seasoned experienced lawyers through integration with OCBA programs and activities and also to serve the Oakland County Community at large.
TURNING OUT THE LIGHTS:
Planning for Closing Your Law Practice

2 | Introduction
3 | Getting Ready for the Unthinkable
4 | Foreword to Second Edition
5 | Initial Checklist for Protecting Clients’ Interests and Closing a Law Office in an Orderly Manner
6 | Checklist for Closing Your Law Office
7 | Suggestions for Planning for a Sabbatical/Extended Absence
8 | Agreement Between Planning Attorney and Assisting Attorney
9 | Notice to Professional Liability Insurance Company of Designated Assisting Attorney
10 | Conditional Durable Power of Attorney
11 | Specimen Signature of Attorney in Fact
12 | Letter of Understanding for Delivery of Power of Attorney
13 | Client Engagement Letter Notifying Client of Assisting Attorney (2 samples)
14 | Contingent Fee Agreement
15 | Explanation of Contingent Fee Agreement
16 | Letter Advising Clients that Lawyer is Closing His/Her Office
17 | Letter Advising Clients that Lawyer is Taking a Temporary Leave of Absence
18 | Law Office List of Contacts
19 | Letter to Clients Advising that Lawyer is Unable to Continue Practicing Law
20 | Letter from Firm to Clients Offering to Continue Representation (From Exiting Lawyer’s Firm)
21 | Office Closure File Tracking Chart
22 | Client’s Request for File
23 | Client’s Authorization for Transfer of Client File
We are members of the North Carolina Bar Association (NCBA), who want to work with lawyers in deciding on the best way to slow down and ultimately retire with dignity and grace. A project originated by the Senior Lawyers Division, our purpose is to provide support to lawyers as they wind down their active career in the law.

For help or information, please call 1-800-662-7407.

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**Request a Consult**
Our consults are completely confidential. Do you know someone who needs to consider retiring or do you need help yourself?

[Link to request a consult]

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**Retire, Reset or Reinvent**
An article by Mark Scruggs

[Read the article]

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**Turning Out the Lights Video Series**
View our "Turning Out the Lights" video series, which covers frequently asked questions from attorneys at the end of their careers.

[View Now]
Questions?
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