



# NEW LAW PRACTICE

## CHECKLIST



The following checklist was developed over the years by members of the NJSBA Solo and Small-Firm section. It is meant to be a comprehensive list of to-do items when establishing a new law practice. If an item does not apply to you, skip it!

CATEGORY	DESCRIPTION
<input type="checkbox"/> Accountant	Discuss with accountant tax consequences, type of entity and accounting basis (cash or accrual), Obtain FEIN from IRS on SS-4
<input type="checkbox"/> Accountant	Set up chart of accounts (Quickbooks template)
<input type="checkbox"/> Accountant	Establish schedule for preparation of monthly statements and account reconciliation
<input type="checkbox"/> Accountant	Determine policy for billing method and client costs advanced
<input type="checkbox"/> Accountant	Obtain forms: journals and ledgers, cash received receipt, time tickets, bill head, thank you letter forms
<input type="checkbox"/> Accountant	Determine need for accounting software
<input type="checkbox"/> Accountant	Develop revenue, expense, cash flow and capital needs budgets (don't forget start-up expenses: deposits, down payments)
<input type="checkbox"/> Advertising	Determine advertising need, review NJ ethics opinions re: advertising/signage



CATEGORY	DESCRIPTION
<input type="checkbox"/> Banking	Attorney Business account, banking supplies (checks, deposit slips deposit stamps), safe deposit box for firm valuables, will storage needs, determine account signers.
<input type="checkbox"/> Banking	Determine need for IOLTA account and/or safe deposit box for client property; review Rule 1:21-6 trust accounting rules.
<input type="checkbox"/> Banking	Determine need for line of credit, firm credit card.
<input type="checkbox"/> Bar Associations	Notify bar associations of physical and mailing addresses, email and telephone.
<input type="checkbox"/> Calendar and Diary	Determine process for maintaining calendar and diary (to-do and tickler system). Dual manual system, auto-mated? Backup procedures (copied or printed and when)
<input type="checkbox"/> Client Intake	Forms: new client/new matter intake form, client interview/initial consultation form representation agreements, fee agreements (flat fee or non-refundable agreement, cost and fee retainer agreements), narratives on how cases are handled, client's responsibilities, post-matter client evaluation forms.
<input type="checkbox"/> Courts	Electronic and file-by-mail capabilities
<input type="checkbox"/> Courts	Notify New Jersey Fund for Client Security re: new address.
<input type="checkbox"/> Dues and Licenses	Bar dues, city and county occupational licenses, if any.



CATEGORY	DESCRIPTION
<input type="checkbox"/> Equipment	Copier, scanner, fax, postage machine, shredder, binding equipment, DVD player, adding machine, etc. Determine which are purchased, which are rented and which are leased.
<input type="checkbox"/> Files	Cabinets, chrono file, accordion file, date stamp, reading files, filing supplies, binders (folders, file pockets, etc) incoming and outgoing mail procedures
<input type="checkbox"/> Files	Master open and closed file lists (manual or automated - or both); determine records retention schedule (see pdf file)
<input type="checkbox"/> Forms	List of needed forms for your practice and where these forms can be obtained.
<input type="checkbox"/> Furniture & Accessories	Art work, carpeting, chairs (executive, secretarial, visitors), conference room furniture, reception room furniture, desks (secretaries, paralegals, lawyers) credenzas, window treatments, umbrella and coat rack, trash and recycling bins. Determine where built-ins will suffice. Lease or purchase?
<input type="checkbox"/> Insurance <b>Critical</b>	Disability, health, professional liability, office pack (liability, business resumption, valuable papers, employee fidelity), workers' compensation. Flood
<input type="checkbox"/> Library, Legal Research	Determine need for on-line databases, hard copy library materials and directories, periodical subscriptions, bookshelves (floor strength?); Fastcase, Google Scholar.
<input type="checkbox"/> NJICLE Publications	Review available list of helpful start-up materials. Administrative and legal forms.



CATEGORY	DESCRIPTION
<input type="checkbox"/> Mail and Messengers	Mailing supplies (labels, USPS supplies etc.), express mail accounts (e.g., FedEx, UPS, etc.), email account, private courier account.
<input type="checkbox"/> Maintenance and Janitorial	Office cleaning, garbage removal, landscaping/snow removal, carpet cleaning services—may be included in office lease.
<input type="checkbox"/> Marketing	Business cards, stationery, announcements, holiday cards, thank you notes/form letters, practice-specific paper (e.g., will paper)