Moving Checklist

The Law Society of Alberta has created this checklist for lawyers moving to new office space, whether they are transferring to a new firm or moving their practice. It should be read along with other website resources dealing with file retention and storage requirements, as well as those dealing with the ethics of leaving a law firm (links to resources are included in the checklist below). Also see the Startup Checklist in the Law Society's Start-Up Kit.

As an initial consideration, when you are setting a date for your office move, try to find a date that will create the least disruption in your practice. You will want to maintain a clear calendar for the week you are moving. Also select a key staff member to oversee the details of the office move. That staff member will work with you to ensure that all tasks are completed, and to avoid unnecessary down time.

The checklist below includes some basic requirements you should consider to make your office move as seamless as possible:

1. Inventory your Existing Practice

- ☐ Create a full inventory of your existing practice, including files, systems, equipment, furniture, resource materials, and supplies
- ☐ Determine what you own, what you lease, and what you wish to retain to take to your new space
- ☐ Consider donating or selling any items you no longer wish to keep
- ☐ When dealing with client files and digital data, ensure that you are protecting client confidentiality
- ☐ Review contents of safety deposit box or other secured storage – you may wish to return original wills to clients

2. Notify Current and Former Clients

- ☐ Advise current clients as far in advance as possible
- ☐ Send a standard neutral notification letter. Where a lawyer is leaving the firm, the letter should be sent jointly from the departing lawyer and the firm – see Law Society website article on ethical considerations when leaving a law firm
- ☐ Prepare corporate resolutions to change registered offices of professional corporation and clients' companies

3. Notify Opposing Counsel in all Open Matters

- ☐ Notification to opposing counsel, courts or others involved in current matters
- ☐ Litigation files may require formal notices to comply with the Rules of Court
- ☐ Update pleading templates with your new address

4. Notify the Law Society/Update Your Contact Particulars

- ☐ Request to Change Contact Particulars

5. Notify Financial Institutions, Accountant/Bookkeeper, Payroll Services and Insurers

6. Change of Address Notifications

- ☐ Send out change of address notifications in advance of the move
- ☐ Arrange to have your mail and email forwarded to your new office and email address. Your existing email address should be kept open for a reasonable period following the change and monitored
- ☐ Consider adding a "new address" notification to correspondence and electronic signatures in emails after moving
- ☐ Include a message regarding your move on individual and firm voice mail greetings and have your receptionist remind clients when answering calls
- ☐ Consider call forwarding if your phone number has changed; arrange for phone messages to be forwarded
- ☐ Determine if any public notice is required
- ☐ Consider signage at your old office to redirect clients to your new address

7. Utilities and Service Providers

- ☐ Make lists of all existing utilities or service providers (registry accounts, electricity, cable, phone, internet, tech support, copier, coffee/tea systems, water)
- ☐ Provide all contacts with your move date and confirm whether services will be terminated or transferred
- ☐ When you are in your new space, create a new list to use for any future moves or updates

8. Complete an Advance Visit to your New Office Space to Ensure Facilities are Set Up and Ready

- ☐ Is your new office space large enough for all of your furniture, equipment, files and staff?
- ☐ Ensure technological systems are operational
- ☐ Advise landlord of who has authority to access the premises during renovations and during the move
- ☐ Confirm parking arrangements

9. Use a reliable moving company to transfer your office content and client files

- ☐ If you do not know one, ask colleagues for a referral
- ☐ Check reviews of companies before selection
- ☐ Confirm elevator access at old and new premises for moving day

10. Packing Your Office Contents

- ☐ Use banking boxes for client files and confidential information
- ☐ Label and catalogue everything clearly and identify those boxes which contain items you will need immediately upon moving to your new office
- ☐ Label your boxes to identify where they should be delivered (*eg.* file room, main office)

11. Update Your Advertising and Networking

- ☐ Social Media Accounts
- ☐ Websites – ensure mapping updates
- ☐ Electronic signatures on email
- ☐ Print Advertising
- ☐ Business Cards
- ☐ Letterhead
- ☐ Online directories
- ☐ Organizational Memberships *eg.* CBA

12. Order Updated Trust and General Cheques (if required)

- ☐ If you no longer require a trust account, speak to Trust Safety about any filing requirements

13. Practice Management Software Licenses

- ☐ Trust Accounting software
- ☐ File management software
- ☐ Office software (Office, Adobe, etc.)

14. Intellectual Property Review

- ☐ Discuss and confirm any intellectual property you will take with you and what might stay with the firm
- ☐ Articles, presentations, promotional videos, forms, software applications, education content, databases, knowledge management tools

15. Employees

- ☐ Ensure you provide sufficient notice to any employees not coming to the new firm
- ☐ Prepare all necessary paperwork and forms
- ☐ Schedule a farewell lunch with employees who will not be coming to new office
- ☐ If employees will be helping you with the move outside of regular business hours, ensure you are covering expenses (eg. food, transportation)

16. File Archiving in Advance of Move

- ☐ Consider archiving files before the move to make packing and moving more efficient.
- ☐ Consider organizing archived files by retention requirements to facilitate the scheduling of closed file destruction; see the Law Society's article on file storage and document management

17. Meet with Human Resources or Senior Partners

- ☐ Discuss any existing benefits that may be transferrable
- ☐ Sign off on documents
- ☐ Hand in keys/fobs
- ☐ Turn over list of existing computer and phone passwords
- ☐ Exit interview

18. Equipment

- ☐ Identify any office or technical equipment that may be moved to your new firm
- ☐ Consider taking any personal items home in advance of a move
- ☐ Discuss any existing service plans with equipment, *eg*. smartphones, tablets
- ☐ Review and update any lease agreements

19. Taking Clients with You

- ☐ See the Law Society's resource on ethical considerations when lawyers leave law firms
- ☐ Finalize in writing any financial matters related to billings you may be owed after departure