

## ***Firm Practice Issues Check List***

Check off the following items you have completed. Save the checklist and check off the others as you complete them.

- General Accounting System
- Trust Accounting System
- Insurance
- Conflicts Checker
- Fee Agreements – retainer, flat fee, contingency, hourly
- Collection policies
- File management and follow up systems: Consider an integrated accounting and case management program that will include calendaring, contact management, document management, conflict searches and other utilities
- Ethical considerations as they relate to your practice area
- Office systems: form usage, checklist, billing statement, correspondence
- File Retention and Disposal
- Technology – computer, lap top, PDA, printers, scanners, back up system, software, word processing, voice recognition, telecommunications, research, shredder, fax, copier
- Disaster Recovery plan
- Client Development
- Web site
- Client screening Process
- Dealing with difficult clients
- Withdrawal of services
- Employee Issues: Status, Taxes, Deductions, benefits, confidentiality, training
- Delegation and supervision
- Coverage during absence
- Handling Growth