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The Road to Retirement: A Checklist

	Undertakings	Days before Deadline	Due Date	Completed	Comments
1	PR Office Consults	Ongoing	Ongoing		
2	Prepare Master File List	180			
3	Written Status Report to Practice Review	120			
4	Stop Accepting New Files	120			
5	Advise clients of retirement	120			
6	Open file details (where are they going)	90			
7	Closed file details (storage & shredding)	90			
8	Review WIP & unbilled disbursements	75			
9	Review wills – take any appropriate action (Return originals to testators)	60			

10	Return original docs to clients or satisfy UT's or trust conditions	60			
11	Return all trust monies/property to clients	30			
12	Notices re registered office/original docs/property – provide notice	30			
13	Written status report to Practice Review	30			
14	Close all trust accounts and provide confirmation of closure to the LSA along with inactive application.	15			
15	Final accounting upload and final self-report	15			
16	Cancel email address, LinkedIn account, firm's website	0			
17	Remove all firm signage & lock the door	0			