**The Simple Succession Checklist**

* Find a successor attorney to take over your practice if you become disabled or pass away, and have them sign the attached agreement.
* Make sure that your successor attorney has access to:
  + An active file list
  + Calendared events
  + Logins/passwords
  + Significant business agreements (e.g., lease)
  + Billing, banking, and trust account records
* Numerous agreements, forms, and other related information are available online from other states that you can use for your specific issues and needs. They are:

1. Iowa: <https://www.iowabar.org/?pg=SuccessionPlanning>
2. [Washington:](https://www.wsba.org/for-legal-professionals/member-support/practice-management/guides/disaster-planning.)
3. Wisconsin: <https://www.wisbar.org/formembers/practicemanagement/Documents/After%20All,%20You%20Are%20Only%20Human%20Version%20131028.pdf>
4. New Mexico: <https://www.sbnm.org/Member-Services/Succession-Planning>
5. [New York](https://nysba.org/attorney-resources/planning-ahead-guide/) [NYSBA-Planning-Ahead-Guide-Second-Edition2 (1)](https://www.mnbar.org/docs/default-source/default-document-library/nysba-planning-ahead-guide-second-edition2-(1).pdf?sfvrsn=8f18ab7c_0)
6. [Planning Ahead August 2015 Oregon](https://www.mnbar.org/docs/default-source/default-document-library/planning-ahead-august-2015-oregon.pdf?sfvrsn=cbcd81e8_0)