

Transition to Retirement: Strategy and Success

CPD Select Seminar

Wed. Oct. 3, 2012, Regina | Thurs. Oct. 4, 2012, Saskatoon

Reading List

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The following is a Reading List on topics discussed at the above program:

General overview and discussion of retirement

<http://www.cba.org/cba/practicelink/mf/partnerretirements.aspx>

What will you experience if you retire?

http://www.cba.org/lpac/main/pdf/Cohen_PPP_later_life.pdf

<http://www.lawyersweekly.ca/index.php?section=article&articleid=814>

<http://www.cba.org/cba/practicelink/bwl/secondseason.aspx>

How do you know when it is time to go?

http://www.cba.org/bc/bartalk_11_15/02_12/practice_talk.aspx

<http://www.cba.org/cba/Practicelink/tips/retirement.aspx>

How do you do it?

<http://www.lawsocietygazette.ca/your-practice/are-you-ready-to-implement-a-succession-plan/>

http://www.cba.org/bc/bartalk_06_10/02_08/guest_mark.aspx

<http://www.canadianlawyermag.com/just-saying-no-to-retirement.html?print=1&tmpl=component>

<http://www.lawsociety.bc.ca/page.cfm?cid=2077>

Personal Financial Planning

http://www.cba.org/cba/PracticeLink/tips/senior_1.aspx

Firm Related Financial Considerations

http://www.cba.org/cba/practicelink/solosmall_finances/succession.aspx

<http://www.lawsocietygazette.ca/your-practice/selling-a-sustainable-legal-practice/>
(links to LSUC "Succession Planning Toolkit")

<http://www.sellyourlawpractice.com/what-is-a-law-firm-worth>

Business Obligations

<http://www.canadianlawyermag.com/closing-a-law-practice-strategies-for-an-effective-exit.html>

<http://www.cba.org/cba/practicelink/mf/sellclose.aspx>

<http://rc.lsuc.on.ca/jsp/pmg/closingDown.jsp>

http://www.lawsociety-barreau.nb.ca/assets/other_documents/Checklist_Closing_Law_Practice.pdf

https://docs.google.com/viewer?a=v&q=cache:JMd-ACGfWDIJ:www.ncbar.org/media/299880/turningoutthelights.pdf+Turning+Out+the+Lights:+Planning+for+Closing+Your+Law+Practice&hl=en&gl=ca&pid=bl&srcid=ADGEESioBdk16KweEQO-gW2HACI5_5CWC_hY9r6Cx07y1YfQNAS0NljaGEp1_CY7qmQHvWTTIQjK-mGGH_pzmm-xjE_uP1GqGIDCBUHh8uw9Sw68ej3pRJB36f7XdezSoONry3HpeoGe&sig=AHIEtbQMbUz0vsdw0gN2xGp_mnM0Ko62w5g

Also see the article: “*Retention, Storage and Disposition of Client Files*” authored by Rod MacDonald in his capacity of Practice Advisor for the Law Society. These articles are published in the Benchers’ Digest as follows:

November, 2007, Volume 20, Issue #5: <http://www.lawsociety.sk.ca/media/21253/bv20i5.pdf>

April 2008, Volume 21, Issue #5: <http://www.lawsociety.sk.ca/media/21259/bv21i2.pdf>

November 2008, Volume 21, Issue #5: <http://www.lawsociety.sk.ca/media/19697/BD%202008%20Nov.pdf>

CBA Saskatchewan Bar Notes (Record Retention) - members can access Summer 2007 issue at:

https://www.cba.org/CBA_Wall_Login/login.aspx?TheURL=http://www.cba.org/saskatchewan/main/barnotes/issues.aspx

Ongoing Firm Needs - Mentoring

http://catalystlegal.com/Articles/Lawyers_and_Retirement_Planning.htm

<http://www.cba.org/cba/practicelink/WWP/youngrainmakers.aspx>

Communication - Client Transition

<http://www.cba.org/cba/PracticeLink/wwp/transitioning.aspx>

Regulatory Requirements

<http://www.lawsociety.sk.ca/lawyer-regulation/>

Disability and Forced Retirement

<http://www.lawsociety.sk.ca/media/21250/bv20i4.pdf>

<http://www.seniorlawyers.org/checklist.htm>