

Disability Planning and Recovery Checklist for Solos

From *Flying Solo: A Survival Guide for the Solo and Small Firm Lawyer*, Fourth Edition
Law Practice Management Section

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1. *Plan for the worst.* If you plan for the worst, then even the worst won't be as bad to handle. Preparation is essential for the well-being of everyone who depends upon you and cares for you.
2. *Remember that your life can remain productive.* Many people bounce back from injury or illness, no matter how serious it is at first. After a while, almost everyone is able to return to work and lead a productive life. Even those who can't return to work can still lead productive and satisfying lives.
3. *Find a lawyer who can take over your practice.* We should all have backup lawyers to cover for our vacations, if for no other reason. For your backup lawyer, select someone you respect and trust completely. Your backup should be familiar with your practice field, should be free of conflicts involving your clients, and should reside nearby. The duties of a backup lawyer can include any of the following, depending upon the need:
 - Take possession of the office and especially the files, without reading the files.
 - Review mail, and leave it aside when not requiring some action due to time.
 - If action is required, notify the party, court, and/or opposing counsel of the situation and seek an agreement for an extension.
 - Make notes of all actions taken for the absent lawyer.
 - If a client wants his or her file, obtain a receipt and letter from the client explaining, or at least making, the request. Ascertain that the account is paid to date or make secure arrangements for payment.
 - If an appearance in court is required, notify the court of the reason and file only a limited appearance.
 - Review all the files, select those where there is a conflict (with the backup lawyer), flag or otherwise note them, set them aside, and provide for an alternate lawyer to make the review. Many state and local bar associations provide programs and institutional organizations that can handle these tasks.

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