



SOLO PRACTICE CHECKLIST

Once you have determined that solo practice is the path for you, there are some fundamental steps to consider in your implementation.

Below is a checklist of these basic areas to get you started.

- 1. Choose a Business Form (Sole Proprietorship, Corporation or LLP)**
- 2. File Necessary Documentation**
 - Secretary of State
 - State Bar
 - Local agencies
 - Federal requirements (Tax ID or EIN)
 - Publish DBA
- 3. Develop a Business Plan: Identify Objectives and Goals**
 - Mission statement (declaration of fundamental purpose & principles)
 - Vision statement (declaration of destination)
 - Action plan
 - Action steps
 - Time frame
- 4. Consider Relevant Expenses**

Office Space

- Virtual office space
- Shared space
- Mailbox with street address rather than P.O. box

Office Equipment

- Desk, bookcases, file cabinets
- Phone, computer, hardware & software, back-up server
- Office supplies

Marketing

- Website (including domain name & email). Check sites like GoDaddy.com or NetworkSolutions.com.
- Consultants (if any)
- Business cards
- Brochures
- Entertainment/networking (including membership dues)

Insurance

- Malpractice (group rates may be possible through state & local Bar associations)
Health/life/disability

Legal Resources

- Identify & purchase essentials
- Lexis/Westlaw, or other online service(s)
- Access to local law library
- Internet (research, forms, etc.)

Billing & Timekeeping

- Programs such as Quickbooks, Peacktree, etc.
- ABA website with comparisons
- Other Software
- Document management, legal forms, calendar
- Professional/Other Resources
- Accountant Insurance agent IT consultant
- Separate bank account
- Client trust account
- Administrative help (through shared office space, temp agency, law school postings, etc.)

5. Develop a Marketing Strategy

- Let everyone know what you are doing via press release, announcements, etc. (large firm contacts are a great source of referrals)
- Get involved with Bar and business associations
- Attend conferences for solo practitioners (your state Bar website should have a page devoted to solo/small law firms)
- Send out newsletters, articles of interest Get involved in blogs, social network sites

6. Move forward!