**Member transition Plan**

The firm has a succession and retirement policy that aims to provide the firm and its members with predictability and fairness as well as a measure of autonomy and flexibility. The policy outlines a framework for communication and planning, and the Member Transition Plan is a key component. It encourages members to consider their own practice as well as their role in the firm, to determine their goals and the legacy they hope to leave, and to establish a plan that aligns therewith. Members are asked to develop the plan three years prior to their anticipated retirement date and submit it to the Director of Professional Development and the Managing Partner.

**Member name:**

**Practice:**

**Office:**

**Intended retirement year:**

**Plans and Objectives**

Describe your firm retirement plans. Include expected retirement date and expected billable hours each year up to retirement.

**Capabilities**

Discuss your unique expertise and capabilities, and identify successor lawyers. Address skills training plans or skills gaps, if applicable.

**Key Client Relationships**

For each key client, please describe the following:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Company** | **Key Contact(s)** | **Describe the status of the relationship, (including opportunities or threats to the company or relationship)** | **Successor Lawyer(s)** | **Succession and communication plan (including elements of the transition that have already begun)** |
|  |  |  |  |  |
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|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Business Development Relationships and Other Key Contacts**

Describe your industry network relationships, leadership positions in professional organizations and key referral sources.

**Firm Responsibilities**

Describe any roles you hold in firm management and administration.

**Support**

How can firm management, practice leadership or this committee support your goals or facilitate your succession?

**Next Steps**

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