

JOINT LETTER FROM FIRM AND DEPARTING ATTORNEY

RE: [Name of Case]

Dear [Name]:

[Departing Attorney] is leaving our firm as of [date]. [Departing Attorney] can take your file with [him/her/them] and continue to represent you in this matter, or a member of our firm, [Former Firm Name], is available to handle your case if you wish [him/her/them] to do so.

To authorize [Departing Attorney] to continue handling your case, please sign on the first line at the end of this letter, and return the letter to this office. To remain with our firm, please sign the second line at the end of this letter, and return the letter to this office. *(NOTE: You may choose instead to enclose separate consent or authorization forms for the client to sign and return.)*

Your case may involve time-sensitive deadlines, so it is important that you respond promptly. Please provide authorization for either [Departing Attorney] to take your file, or for us to retain your file at our firm, no later than [Date].

We want to make this transition as easy as possible. Please feel free to contact [Departing Attorney] or me with your questions.

Sincerely,

[Departing Attorney and Managing Partner]

I want [Departing Attorney] to continue handling my case.

[Client Signature]

[Date]

I want my file to remain with the firm.

[Client Signature]

[Date]

SEPARATE LETTER FROM DEPARTING ATTORNEY

(NOTE: Only send this letter to clients with whom you have a professional relationship.¹)

RE: [Name of Case]

Dear [Name]:

I will be leaving [Former Firm Name] as of [date]. I am [opening my own office] located at [address].

I can take your file with me and continue to represent you in this matter, or a member of [Former Firm Name], is available to handle your case if you wish [him/her/them] to do so. The choice is yours.

To authorize me to continue handling your case, please sign on the first line at the end of this letter, and return the letter to this office. To remain with the firm, please sign the second line at the end of this letter, and return the letter to this office. (NOTE: You may choose instead to enclose separate consent or authorization forms for the client to sign and return.)

Your case may involve time-sensitive deadlines, so it is important that you respond promptly. Please provide authorization for either for me to take your file, or for [Former Firm Name] to retain your file, no later than [Date].

I want to make this transition as simple and easy as possible. Please feel free to contact me or [Name of Former Firm Contact] with your questions.

Sincerely,

[Departing Attorney]

I want [Departing Attorney] to continue handling my case.

[Client Signature]

[Date]

I want my file to remain with the firm.

[Client Signature]

[Date]

¹ Review Oregon RPC 7.3 regarding solicitation of clients. (See also [Ethics Opinions – Departing a Firm](#), as well as [Articles – Departing a Firm](#), available online at <https://www.osbplf.org/>. Select Practice Management, and then select Forms.)

NOTE: In the event of an unfriendly separation, the departing attorney and former firm may send separate letters to clients. ABA Formal Op No 99-414 recommends that a letter from the departing lawyer should:

- Not urge the client to sever the relationship with the former firm, but may indicate the lawyer's willingness and ability to continue responsibility for the matters upon which the lawyer is currently working;
- Make clear that the client has the ultimate right to decide who will finish the case; and
- Not disparage the lawyer's former firm.

IMPORTANT NOTICES

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