



## Legal Lunchbox™ Series: How and When to Close a Law Practice

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### ORIGINAL PROGRAM DATE

February 27, 2025

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### REPORTING YOUR CREDIT

This on-demand seminar was originally presented as a live webcast on February 27, 2025, in Seattle, WA. If you attended the live webcast and reported CLE credits, you cannot also report credits from watching or listening to this recording if repeated within your three year reporting period.

### DESCRIPTION

This month's Legal Lunchbox™ is a pre-recorded program that is available for free to WSBA members for the entire month of August 2025.

Join presenters from the WSBA's Practice Management and Member Wellness Programs to learn about various aspects of closing a law practice. First, Practice Management Advisor Margeaux Green will walk you through a step-by-step guide to winding down your practice in an organized and efficient way, including document retention and financial considerations. Second, Dan Crystal and Adely Ruiz from the WSBA Member Wellness Program will discuss how to ascertain that it's time to retire and plan a healthy, invigorating new chapter.

The sessions in this on-demand product originally aired on Thursday, February 27, 2025, as part of the WSBA CLE program Closing a Law Practice. If you viewed the original presentation, please note that WSBA members may not claim credit for the same CLE sessions if repeated within their three-year reporting period.

### AGENDA

#### 1 Practice Management: A Step-by-Step Guide to Closing Your Business

In this session, we will walk through the practical steps involved in closing a law practice. This session is designed to help legal professionals navigate the complexities of winding down their practice in an organized and efficient manner. Key topics will include creating a timeline, financial considerations, providing notice, insurance matters, document retention issues, handling open cases, and ensuring preparedness with a disaster plan. By the end of this session, attendees will have an understanding of the essential steps and business best practices for closing a law practice.

*Margeaux Green - Washington State Bar Association, Seattle, WA*

#### 2 To Close or Not to Close

Member Wellness Program therapists Adely Ruiz and Dan Crystal will address the warning signs that retirement will be important for oneself and one's clients. We will also explore ways to titrate back your legal practice in a gradual manner. Finally, we will discuss best practices for planning a healthy, invigorating new chapter.

*Dan Crystal - Washington State Bar Association, Seattle, WA*

*Adely Ruiz - Washington State Bar Association, Seattle, WA*