



So, what's next? How to find success in your Succession Planning

- Muliha Khan, Zupkus & Angell, P.C., Denver, CO
- Brian Kuhlmann, Shelter Insurance, Columbia, MO
- Bob Zupkus (retired), Zupkus & Angell, P.C., Denver, CO

OWNER

SHAREHOLDER

PARTNER

MEMBER

What's your plan?

Dissolution/winding up/termination?

Transitioning your business?

Continuing your legacy?

Regardless of your decision, you must pre-plan.

Avoid procrastination!



LATER



NOW

What's your plan?

Attorneys/Associates

Marketing Plan

Alignment

Long-term goals

What about the Clients?

HOW?

WHEN?

CPAs

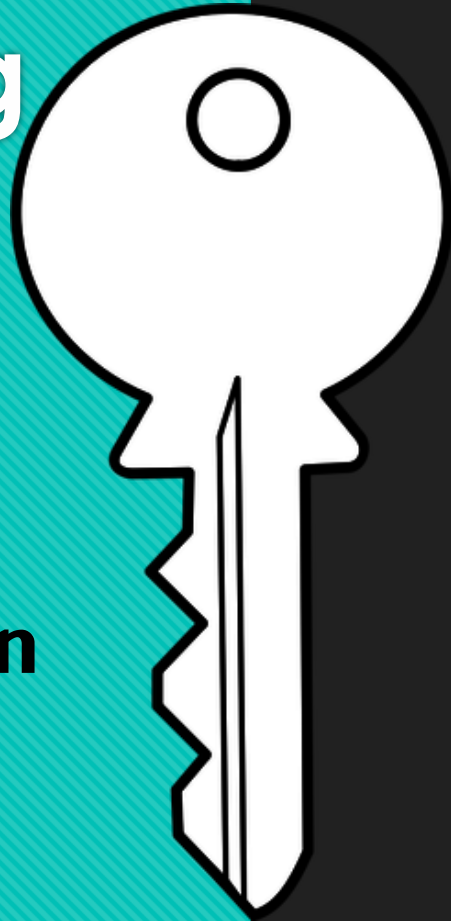
Lawyers

Marketing

Involving the Professionals

Structuring a Deal

**Open
communication
is KEY!**



Meetings

Internal
Memoranda

Contracts

Deadlines

Applicable Model Rule of Professional Conduct

Rule 1.17: Sale of Law Practice

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Client-Lawyer Relationship

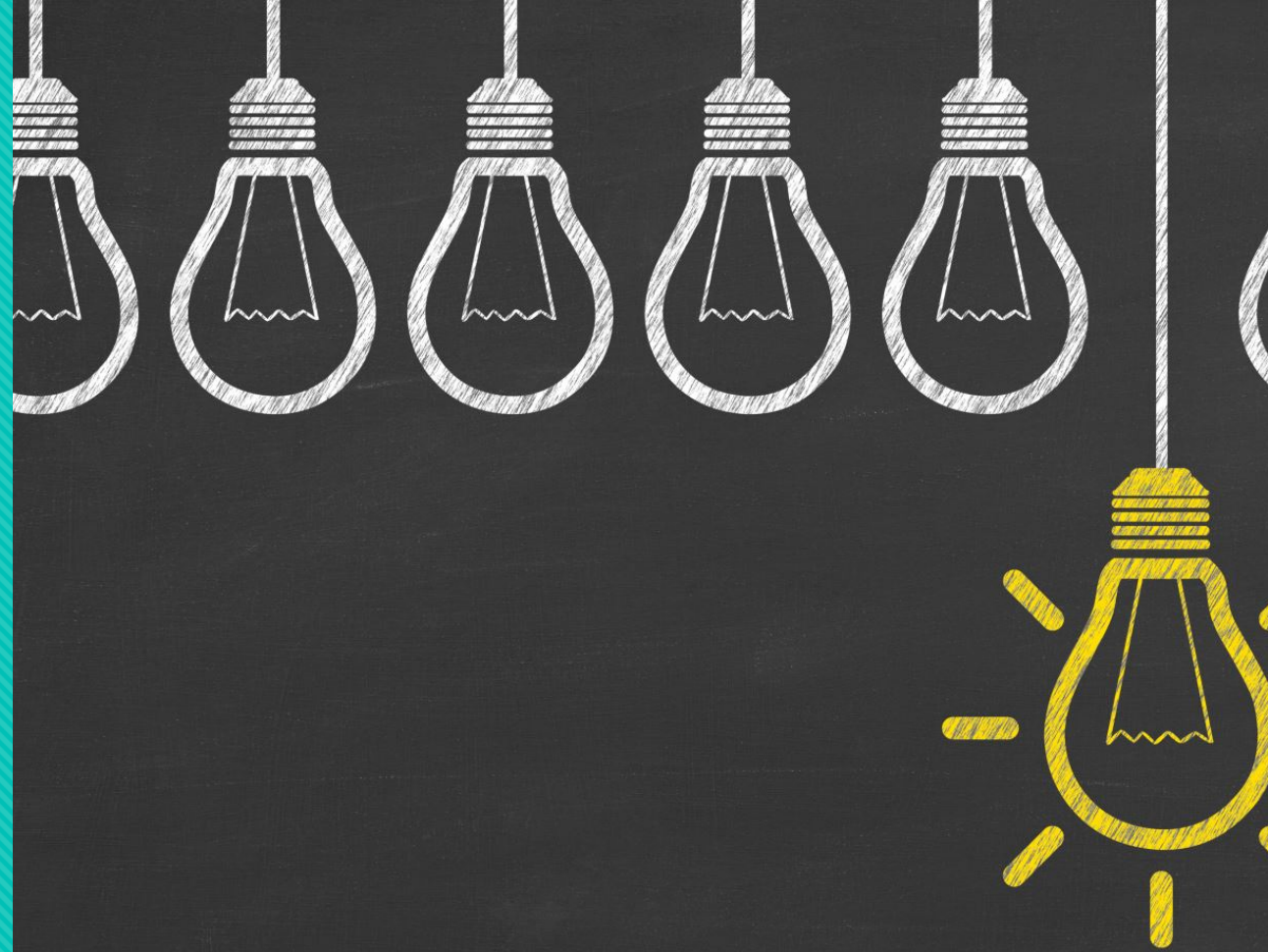
A lawyer or a law firm may sell or purchase a law practice, or an area of law practice, including good will, if the following conditions are satisfied:

- (a) The seller ceases to engage in the private practice of law, or in the area of practice that has been sold, [in the geographic area] [in the jurisdiction] (a jurisdiction may elect either version) in which the practice has been conducted;
- (b) The entire practice, or the entire area of practice, is sold to one or more lawyers or law firms;
- (c) The seller gives written notice to each of the seller's clients....
- (d) The fees charged clients shall not be increased by reason of the sale.

A Marathon.. Not a Sprint

Focus on professional development

Continued opportunities and exposure



**THINK OUTSIDE
THE BOX!**



Primerus

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Thank you for attending!

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