BOARD OF OVERSEERS OF THE BAR

Established by the Maine Supreme Judicial Court

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Proxy Planning Checklist

Once you selected an attorney who has consented to act as your proxy, you and that attorney should discuss a plan. You should not put off the discussion. Important topics to discuss include, but are not limited to the following:

1. Emergency Information
   a. Name of power of attorney;
   b. Estate Personal Representative;
   c. Staff names, titles, contact information;
2. Financial Information
   a. A comprehensive list of bank accounts (IOLTA, trust, fiduciary, and operating);
   b. Who has signing authority?
   c. Name of Accountant, or bookkeeper if not an in-house employee;
   d. List of safe deposit box(es)/safe/storage areas outside of physical office;
3. Vendor Information
   a. Vendor List;
   b. Insurance policy and agents list (professional liability, general liability, life, disability etc.);
4. Office Procedures
   a. Is there an office manual?
   b. Is there an employee or personal manual?
   c. How to access voice mail messages;
   d. Who has access to the office; possesses office keys? (staff, landlord, cleaning crew?)
5. Technology
   a. Name and contact information for IT staff/vendor;
   b. Mobile phone provider, passwords;
   c. Location for computer back up disks/tapes/services are located; passwords;
   d. Computer passwords;
   e. Use of and access to any cloud storage;
6. File Management
   a. Conflict check system;
   b. Access to any file management/time keeping/billing system;
   c. Access to any practice management system;
   d. Access to any calendaring system;
   e. Closing and retaining files and client documents.