

**STATE BAR OF MICHIGAN  
2008-2009 COMMITTEE ANNUAL REPORT**

**Article VI §6, Bylaws of the State Bar of Michigan**

*No later than May 1 of each year, the chair of each committee and subentity of the Bar, with the assistance of the staff liaison, shall report to the Executive Director on a form provided by the State Bar on the activities and accomplishments of the committee or subentity.*

**Committee Name:** Special Committee on Senior Lawyers Section Planning Group

**Jurisdiction:**

The Senior Lawyer Section Planning Group shall:

1. Explore and recommend whether the State Bar of Michigan should create a Senior Lawyer Section as a new entity with a structure similar to the Young Lawyer Section, including automatic section membership for all members who reach a threshold age, no section dues paid by members, and a budget for the programs and activities of the Senior Lawyer Section provided by the State Bar of Michigan, and
2. Explore and recommend the jurisdiction of the Senior Lawyer Section, including the key focus areas of its work for the next two years.

**Chair(s) and Committee Members:**

Officer	Name	Address	Telephone	Email
Co-Chair	Ronald D. Keefe	128 W. Spring St., Marquette, MI 49855	906 226-2543	keefe@kendrickslaw.com
Co-Chair	Gregory Ulrich	33900 Schoolcraft Rd., Livonia, MI 48150	734 261-2400	gulrich@cmda-law.com
Staff Liaisons	Anne Vrooman, Candace Crowley, Martha Burkett, Nkrumah Johnson-Wynn, Dionnie Wynter, Amy Castner	306 Townsend Lansing, MI 48933	800 968-1442	<a href="mailto:avrooman@mail.michbar.org">avrooman@mail.michbar.org</a> , <a href="mailto:ccrowley@mail.michbar.org">ccrowley@mail.michbar.org</a>
Commissioner Liaison	Laura Anne Chappelle	4218 Jacob Meadows Dr., Okemos, MI 48864	517 281-1515	laurac@chappelleconsulting.net

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Member/Advisor/Other	Member/Advisor/Other
Austin G. Anderson (Emeritus member)	Lori A. Buiteweg
Lynn P. Chard	Brian D. Einhorn
Robert K. Fergan	Miles C. Gerberding
Hon. Roman S. Gibbs	Hon. Harold Hood
Julius L. Loeser	Richard D. McLellan
Vincent A. Romano	Asher N. Tilchin
Donald J. Walter	Kate Birnbryer White (Non-Bar member)
Francine Alexander, Consultant	Joanne Alexander, Consultant

**Committee Meeting Schedule:**

Please attach any additional information needed regarding Committee meetings as an addendum.

Meeting Type	Date	Location
Description		
In-person	June 16, 2008	State Bar of Michigan
In-person	July 16, 2008	State Bar of Michigan
In-person	August 20, 2008	State Bar of Michigan
Telephone	December 17, 2008	Telephone
In-person, telephone	April 24, 2009	State Bar of Michigan

**Resources provided by the State Bar of Michigan in support of committee work:**

The State Bar provided consultant and staff support, meeting space, telephone meeting support, and food and beverages for the committee.

**Committee Activities:**

This report reflects activities of the committee since the May 1, 2008 annual report issued by the 2007-2008 Planning Group.

**Background:**

In November of 2007, the State Bar of Michigan Board of Commissioners chartered a Senior lawyer Section Planning Group, seeking recommendations on programs, services and structures within the Bar to provide a proactive response to the significant and continuing increase in the number of lawyers over the age of 60. That Planning Group submitted an initial report in January 2008 that made recommendations focusing on the goals of increasing protection of the public and enhancing opportunities for members to contribute. In accepting the report, the Board requested that an extended and expanded Planning Group develop the initial recommendations into a detailed Work Plan for the State Bar and Senior Lawyer's Section.

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2008-2009 Activities:

The services, programs and resources identified in the Planning Group's January 2008 report served as the starting point for this Planning Group's work. From June through August of 2008, the Planning Group:

- Gathered demographic information
- Reviewed ABA materials and approach
- Sought progressive approaches by State Bars
- Discussed the National Organization of Bar Counsel-Association of Professional Responsibility Lawyers Report especially regarding those regarding strategies to enhance protection of the public to ensure that competent services are provided to clients.
- Conducted a member survey
- Discussed emeritus status and fee structure
- Convened Planning Group discussions

The Planning Group issued a Report and Work Plan in September of 2008, attached to this report. The Report included recommendations regarding section membership and fees, name, by-law revisions, and budget matters.

The Work Plan set forth action in three main areas: provide service to members, protect the public, and contribute to the community. The plan provided that work would be addressed in three separate phases. Detailed activities for Phase I were set forth in an implementation guide.

The Programs and Services Commissioner Committee moved the Report to the Board of Commissioners for its review in January 2009. The Board of Commissioners agreed that the activities set forth in the Work Plan were valuable for members and the public, but had questions about section membership, fees, and the name of the section. While those issues are under review, staff and volunteers are moving forward with elements of Phase I of the Work Plan that explore meaningful services for the profession and the public that are not dependent on a particular section name or means of achieving membership. Phase I work is staff and volunteer driven and its fiscal implications are minimal.

**Future Goals and Activities:** The Planning Group will continue to review options for the name of the section and means for achieving membership, and will engage in the 2009-2010 budget process so that the fiscal implications of Phase II and Phase III work are addressed. It will continue to work with staff to develop Phase I Work Plan items.

**Other Information:** The Report, Recommendations and Work Plan of September 2008 are attached to this report.

**Senior Lawyer Section Planning Group  
Summary Report, Recommendations and Work Plan  
September 2008**

**Senior Lawyer Section Planning Group Committee Members**

**Chair: Greg Ulrich**

**Members:**

Austin G. Anderson  
Lori A. Buiteweg  
Lynn P. Chard  
Brian D. Einhorn  
Robert K. Fergan  
Miles C. Gerberding  
Hon. Roman S. Gribbs  
Hon. Harold Hood  
Julius L. Loeser  
Richard D. McLellan  
Vincent A. Romano  
Asher N. Tilchin  
Donald J. Walter  
Kate Birnbryer White

**State Bar of Michigan Staff:**

Martha Burkett  
Amy J. Castner  
Candace A. Crowley  
Nkrumah Johnson-Wynn  
Anne M. Vrooman  
Dionnie Wynter

**Consultants:**

Joanne Alexander  
Francine Alexander

**Background**

In November 2007, The State Bar of Michigan Board of Commissioners chartered a Senior Lawyer Section Planning Group, seeking recommendations on programs, services and structures within the Bar to provide a proactive response to the significant and continuing increase in the number of lawyers over the age of 60.

This Planning Group submitted an initial report in January 2008 that made recommendations focusing on the goals of increasing protection of the public and enhancing opportunities for members to contribute. In accepting the report, the Board of Commissioners requested that an extended and expanded Planning Group develop the initial recommendations into a detailed Work Plan for the State Bar and Senior Lawyer's Section.

The services, programs and resources identified in the Planning Group's January 2008 report served as the starting point for the Planning Group's work. This report summarizes the expanded Planning Group's process and recommendations, and includes the recommended Work Plan to address the changing demographics of Michigan lawyers.

## Process and Findings

From June through August 2008, the Planning Group conducted the following activities with support from the State Bar of Michigan staff and external research and planning resources.

1. **Gathered demographic information:** Reviewed 2007 membership information of the State Bar of Michigan and found the following relevant information:
  - 52.3 percent of active Michigan resident attorneys are 50 years or older.
  - 22.9 percent or 7,378 active Michigan resident attorneys are 60 years or older.
  - Of those members who are 60 years and older, 4009 of them are in private practice (54.3%)
2. **Reviewed ABA materials and approach:** Reviewed American Bar Association resources related to senior members and found that the ABA offers a diverse set of online and print resources on topics of interest to senior members such as financial planning, insurance, closing a practice, transitioning from a law firm and retirement preparation. The ABA site also offers access to volunteer search engines that link members with state-level referrals for pro bono legal work. Information on pro bono activities and opportunities is available through the ABA's 'Pro Bono Connection', a bi-annual newsletter. The ABA also actively supports pro bono activities by offering a dues waiver for attorneys who contribute 500 hours of pro bono work annually.
3. **Sought progressive approaches by State Bars:** Reviewed progressive approaches other states have taken to address the needs and opportunities of the growing population of senior lawyers. While there is no single state that offers an integrated and comprehensive set of programs and services for senior members, the group was able to identify leading practices in the following areas:
  - Mandated succession planning for solo practitioners in Indiana, with similar regulatory attempts being sought in New York.
  - Reference materials and protocols guiding the sale or closing of a practice in New York.
  - Senior member outreach via newsletters in Indiana and Minnesota.
  - California and New York are seeking ways to address potential lawyer incapacity concerns
  - Washington D.C. Bar has a Senior Lawyer Public Interest Project that guides lawyers in contributing their legal expertise and finding pro bono legal service opportunities
4. **Discussed NOBC-APRL Report:** Reviewed and discussed the recommendations of the NOBC-APRL Joint Committee on Aging Lawyers Final Report (May, 2007). This report recognizes the invaluable resource that senior lawyers bring to the profession and to their communities while also focusing on strategies to enhance protection of the public. This report proposes strengthening supports and regulations to ensure that competent services are provided to clients. The report also recommends that state bar associations assess the demographics of their memberships, track age-related impairments and provide 'planning ahead' and law practice transfer guidance to members.

5. **Conducted Member Survey:** An online survey was distributed to all SBM members over the age of 50, and 2145 members responded. The survey results confirm the following interests in services and programs of senior lawyers in Michigan:
  - **Highest importance services/programs:** Liability coverage for retired attorneys providing pro bono, health care and disability benefit information, additional levels of membership and reduced fees for seniors, and protocols for meeting clients' needs following death or sudden incapacity.
  - **Lowest importance services/programs:** Ensuring time for networking at State Bar events, retirement planning – social, lifestyle piece, training a successor, and accessing broad volunteer opportunities.
  
6. **Discussed Emeritus Status and fee structure:** Reviewed the history of the perspectives and decisions of the Michigan Supreme Court related to emeritus status, fee structures and pro bono work. The Planning Group believes that the Emeritus category as it currently exists does not serve senior lawyers well or appreciate their longstanding commitment to the profession. It expresses its hope that future categories will be expanded to acknowledge and facilitate the contributions and commitment of older lawyers. The Planning Group also believes that it would be helpful to assist the Supreme Court in its consideration of expanding the pro bono definition and practice privileges of emeritus members if measures were advanced that would enhance protection of the public. To that end, the Planning Group's recommendations include a proposed rule change and additional programs and services to enhance protection of the public.
  
7. **Convened Planning Group Discussions:** Over the course of three meetings in June, July and August, the Planning Group discussed the relevance and applications of the information discussed above. The group discussed the increased opportunities and enhanced support that an invigorated Senior Lawyers Section could provide to members, to the public, and to the Bar. Based on these dialogues the group developed the following recommendations and work plan. The work plan addresses the most pressing needs and opportunities as identified by the group's research, and considers resource implications for the State Bar.

## Recommendations and Work Plan

### **Section Membership and Fees Recommendation**

The Planning Group concurs with the recommendation of the earlier planning group and recommends the following specifics regarding Senior Section membership.

Membership in the Senior Lawyers Section is automatically granted, with no section dues or additional fees, to all active Michigan Bar members who:

- Reach the age of 60
- OR
- Have 30 years of service (*using 'admitted to practice' data*)

Any qualifying attorney that does not want to belong to the Section or receive information from the Senior Lawyers Section will be able to opt out. The Planning Group requests that this recommendation become effective no later than October 1, 2009.

### **Section Name**

The Planning Group recommends that the Senior Lawyers Section name remain the same, and that a tag line for the Section be developed to enhance and promote a strong image of the Section. A committee made up of Planning Group members and Bar staff will develop a tag line for the Section by November, 2008. The tag line will emphasize experience, commitment and contribution of senior lawyers.

### **Work Plan and Implementation Plan**

Further, the Planning Group recommends the following Work Plan (*page 5 of this document*) be implemented by the State Bar to accomplish three objectives:

- Expand services to senior members of the State Bar
- Increase protection of the public
- Expand opportunities for members to contribute to the community.

This work plan is organized into phases, each of which will take approximately eighteen months to two years to complete. An Implementation Guide for the initial phase is included as Appendix A of this report.

### **By-Law Revisions**

Once this report and recommendations are approved, by-law revisions addressing membership changes and the structure of the Senior Lawyers Section will be made as part of the Phase I plan priorities. A team including Section members and Bar staff will work on the draft revisions. The Planning Group also acknowledges the need to revisit Section by-laws periodically to ensure they meet the changing needs and structure of the Section.

### **Budget, Additional Implementation Information and Recommendations**

Regarding budget, the tasks and outcomes identified in Phase I can be accomplished through integration with existing structures of the Bar. It is not anticipated that projects in this phase require direct monetary resources. A working budget from State Bar general funds will be developed for the 2009-2010 Bar year in support of the Plan's Phase II priorities.

The existing Planning Group will continue to oversee the work on this Plan for the upcoming year. An annual review of the progress against goals will take place in the Fall of 2009, and any necessary revisions or adaptations to the Plan will be made at that time.

**State Bar of Michigan  
Senior Lawyers Section Planning Group Work Plan (September 2008)**

<b>PROVIDE SERVICE TO MEMBERS</b>			
	Phase I	Phase II	Phase III
<b>Support Senior Lawyer's Ability to Continue to Practice Law</b>			
Explore affordable liability coverage options			
Promote models for part-time practice			
Develop resources to support reduced or part time practices/roles and second career options			
Develop continuing legal education programs for Senior Lawyers			
<b>Prepare Lawyers for Transition of Practice/Roles</b>			
Develop reference materials for closing/selling a practice, using New York as a model			
Develop reference materials for exiting a firm			
Develop seminar/training program on transition issues, including large firm issues			
<b>Communicate and Market the Senior Lawyers Section Value</b>			
Develop immediate communication strategy educating members re: senior members and work of this group			
Develop a long-term Communication Plan for the senior section that reaches out to Bar members and the public			
Develop a broad-based training and education plan for senior members			
Develop a quarterly newsletter to highlight work and resources of Section			
Collaborate with the Affinity Bars to promote events, trainings and resources available through the State Bar Senior Section			
<b>Assist Members in Retirement Preparation</b>			
Provide education about and access to health care and disability coverage			
Facilitate Retirement Planning			

<b>PROTECT THE PUBLIC</b>			
	Phase I	Phase II	Phase III
<b>Develop Protocols and Procedures to Manage Sudden Death and Disability</b>			
Encourage the Supreme Court to adopt a rule that requires identification of a successor for all active solo practitioners, using Indiana as a model			
Partner with the Attorney Grievance Commission to develop a handbook outlining protocols for handling client files in the event of sudden death, disability or disappearance			
Create seminar/training materials for solo/small practitioners re: handling files and organizational issues to prepare for succession			
Develop training for surrogates reviewing protocols and processes			
<b>Provide Resources and Protocols for Handling Reduced Capacity of Lawyers</b>			
Develop and promote LJAP-like program for individuals to call re: diminished capacity concerns for self and others			
Educate the legal community about recognizing and responding to diminished capacity			
<b>CONTRIBUTE TO THE COMMUNITY</b>			
	Phase I	Phase II	Phase III
<b>Promote Existing Opportunities to Contribute</b>			
Increase awareness of pro bono definitions/opportunities and educate regarding liability coverage availability through qualified programs			
Educate membership about pro bono services and volunteer service opportunities			
Provide mentoring and connection opportunities between senior lawyers and less experienced lawyers			
<b>Expand and Support Opportunities to Contribute</b>			
Encourage the Supreme Court to adopt proposed MCR 8.120, adding emeritus members to the law student practice rule			
Encourage the Supreme Court to adopt the proposed MRPC Rule 6.1 regarding expanding the definition of pro bono work			
Develop new partnerships with non-profit organizations to increase opportunities for use of legal expertise by senior lawyers			
Grow the opportunities on the ABA Volunteer Search Engine for Michigan			

## Appendices

**A:** Work Plan Implementation Guide – Phase I

**B:** Survey Summary

**C:** Resource Inventory



**Senior Lawyers Section Planning Group  
Summary Report and Recommendations -- APPENDICES**

**September 2008**

**Appendices**

**A:** Work Plan Implementation Guide – Phase I

**B:** Survey Summary

**C:** Resource Inventory

## Appendix A: Work Plan Implementation Guide – Phase I

This Implementation Guide outlines the plan strategies for Phase I, which will begin in the Fall of 2008 with final completion on all Phase strategies by March, 2010. This time required to address each of the strategies below will vary. Some will be completed relatively quickly and related Phase II strategies may begin sooner. This will be negotiated and planned by SBM Division staff and the Planning Group member assigned to each strategy.

The next step for Plan Implementation is for the State Bar staff to develop a timeline with key milestones for their strategies.

Strategy	Details	Division/Lead Staff	Planning Group Members
<b>PROVIDE SERVICE TO MEMBERS</b>			
<b>Support Senior Lawyer's Ability to Continue to Practice Law</b>			
Explore affordable liability coverage options	Investigate options for part-time and other unique liability coverage options	Executive Office- Cliff Flood	A. Tilchin, B. Einhorn, K. White
<b>Prepare Lawyers for Transition of Practice/Roles</b>			
Develop reference materials and protocols for closing/selling a practice	Use NY materials as reference; Review existing MI rules re: selling a practice	Professional Standards- Nkrumah Johnson- Wynn PMRC	M. Gerberding, L. Chard
<b>Communicate and Market the Senior Section Value</b>			
Develop immediate communication strategy educating members re: senior members and work of this group	Highlight demographics of Bar, priorities of this plan, and existing resources; At least one-pager, hard copy recommended	Member Services & Communications- Nancy Brown	A. Anderson, A. Tilchin, V. Romano, J. Loeser
<b>Assist Members in Retirement Preparation</b>			
Provide education about and access to health care and disability coverage		Executive Office- Cliff Flood Member Services & Communications- Nancy Brown	A. Anderson, K. White

Strategy	Details	Division/Lead Staff	Planning Group Members
<b>PROTECT THE PUBLIC</b>			
<b>Develop Protocols and Procedures to Manage Sudden Death and Disability</b>			
Encourage the Supreme Court to adopt a rule that requires identification of a successor for all solo practitioners	Use Indiana rule as model	Executive Office- Janet Welch	
Develop a handbook with the Grievance Commission outlining protocols for handling client files in the event of sudden death, disability or disappearance		Professional Standards- Nkrumah Johnson- Wynn	Grievance Commission partnership, V. Romano
<b>Provide Resources and Protocols for Handling Reduced Capacity of Lawyers</b>			
Develop and promote LJAP-like program for individuals to call re: reduced capacity concerns for self and others		Professional Standards- Martha Burkett	A. Tilchin
<b>CONTRIBUTE TO THE COMMUNITY</b>			
<b>Promote Existing Opportunities to Contribute</b>			
Increase awareness of pro bono definitions/opportunities and educate regarding liability coverage availability through qualified programs		Justice Initiatives- Dionnie Wynter	K. White, J. Loeser, <i>(Check with Pro Bono Initiative members, and R. Gillett)</i>
Encourage the Supreme Court to include emeritus status in the pro bono MCR Rule 8.120	Consider: Letter from State Bar mentioning IL ruling; strategic conversations from influential group members; share IL ruling	Executive Office- Janet Welch	R. Gribbs, J. Loeser
Encourage the Supreme Court to adopt the proposed MRPC Rule 6.1 regarding expanding the definition of pro bono work		Executive Office- Janet Welch Justice Initiatives- Dionnie Wynter	R. Gribbs, J. Loeser, R. McClellan

Strategy	Details	Division/Lead Staff	Planning Group Members
<b>Additional PLAN SUPPORT</b>			
Draft By-Law Revisions	To be completed and adopted by Fall 2009	Executive Office- Candace Crowley	
Develop Tag Line for Senior Lawyers Section	To be completed by November 2008; possible words include experience, commitment, and contribution	Member Services & Communications- Nancy Brown	V. Romano, L. Chard, G. Ulrich

## Appendix B: Survey Summary

### I. Demographic Profile of Respondents

- Total Respondents: 2145
  - 33 Emeritus status respondents (2%)
  - 192 Retired members (9%)
- Age:
  - 50-59: 1124 (53%)
  - 60-69: 773 (36%)
  - 70 or older: 239 (11%)
- Private practice: 1197 (56%)
- Solo: 543 (25%)
- Small: 349 (16%)

### II. Results Summary

#### Highest importance:

- Liability coverage for retired attorneys providing pro bono (73% very important/important)
- Health care and disability benefit information (70%)
- Additional levels of membership and reduced fees for seniors (70%)
- Protocols for meeting client's needs following death or sudden incapacity (67%)

#### Least importance:

- Ensuring time for networking at State Bar events (24%)
- Retirement planning – social, lifestyle piece (35%)
- Training a successor (38%)
- Accessing broad volunteer opportunities (38%)

#### Age differences:

- With few exceptions, respondents who were 70 and older group gave more importance to program and service ideas
- 50 - 59 year old respondents gave more importance to: *Guidance on part-time or second careers*
- 50-69 year olds gave more importance to: *Healthcare and disability benefit information*
- All age groups are equally interested in: *Mentoring less experienced colleagues*

#### Solo/small practitioner's differences:

More importance placed on:

- Closing and selling a practice
- Support in identifying a successor/preparing for unexpected departure from practice

Less importance placed on:

- Guidance on part-time or second careers
- Retirement planning – both financial piece and social/lifestyle piece

- Volunteer work using legal expertise and general volunteer opportunities

### III. Comments Summary

Many respondents took the time to add written comments to the survey, which mirror the issues addressed in the survey. Themes from the comments are noted below.

- **Suggest changes in membership and fee structure (64 responses)**
  - Create a sliding fee scale based on:
    - Age or disability (22 responses)
    - Status or type of work (24 responses)
  - Reduce fees overall (10 responses)
  - Rethink Emeritus status (8 responses)
- **Facilitate and/or broker opportunities to volunteer (70 responses)**
  - General volunteerism (19 responses)
  - Use legal expertise in new ways (14 responses)
  - Consideration and support needed for pro-bono work (18 responses)
  - Provide listings and support of volunteer efforts (8 responses)
  - Provide volunteer opportunities with Bar Assoc. (2 responses)
- **Provide support and education to seniors (21 responses)**
  - General education (12 responses)
  - Lifestyle and health issues (5 responses)
  - Second Career ideas and training (5 responses)
  - Phase down plans, "Of Counsel" prototypes, and retirement transition planning (3 responses)
- **Develop mentoring programs and/or opportunities for connections among senior lawyers and newer Bar members (21 responses)**
- **Seek group rates and assist with securing reasonably priced medical coverage after retirement (20 responses)**
- **Promote networking and recognition of senior lawyers (19 responses)**
- **Rethink SENIOR term, and paradigm; Beware of ageism (19 responses)**
- **Facilitate part-time and paid work opportunities for senior lawyers (18 responses)**
- **Change processes to support seniors practicing law and improve image of profession (13 responses)**
- **Provide training and support on how to close a practice, transition out of practice and prepare for sudden departure (11 responses)**
- **Assist in securing liability coverage for retired attorneys doing limited and pro bono work (11 responses)**
- **Assist in retirement planning and financial planning (8 responses)**
- **Acknowledge need for review of abilities of practitioners and judges (8 responses)**

## Appendix C: Resource Inventory

### Senior Lawyer Section

#### Planning Group Resource Inventory, September 2008

##### I. Senior Lawyer Section Planning Group Notes and Resources

Senior Lawyer Section Planning Group, Report and Recommendation to the Board of Commissioners (January 18, 2008 & September, 2008)

Demographic Information of State Bar of Michigan Members

- Active Michigan Member (Anne V. file)
- Year of Birth, Emeritus status (Anne V. file)

Senior Member Survey

- Survey Summary (*Results Overview Senior Survey SBM.doc*)
- Full Survey Results (*Survey Results SBM Final.doc*)
- Comment Report (*Comments Report Final SBM.doc*)

Emeritus Discussion

- Summary of Conversation (*Emeritus Summary.doc*)

ABA Information and References

- Summary of Conversation (*ABA References for SBM.doc*)
- ABA Summary of Recent Events (ABA Summary of Recent SDL Activities 2000-2007.doc)

##### II. Handling Impairment & Sudden Death, Disability or Disappearance

NOBC-APRL Joint Committee on Aging Lawyers Final Report (May, 2007)

Planning for Death, Disability or Disappearance

- Overview Memo by N. Johnson-Wynn (*N. Johnson-Wynn file*)
- Compilation of articles and resources by N. Johnson-Wynn (*N. Johnson-Wynn file*)

##### III. Mandatory Succession and Successor Training/Information

American Bar Association Senior Lawyers Division, **Report to the House of Delegates Recommendation** (<http://www.abanet.org/srlawyers/resolution.html>)

Supreme Court of the State of New York Appellate Division: Second Judicial Department, *Handbook for Court-Appointed Inventory Attorneys*, November 2007 (copy from ?? – was distributed at meeting)

State Bar of Indiana Ruling (from Miles Gerberding)

#### IV. Establishing a Senior Lawyer Pro Bono Project

##### [Senior Lawyers Organizing & Volunteering: A National Profile](#),

- Published by the ABA Center for Pro Bono and Senior Lawyers Division in 1996.
- Outlines senior lawyer opportunities in a particular state, and the intent of the publication is to allow states to learn from each other. The themes of the publication include: (1) the organization of senior lawyers at the state and local level, (2) the development of senior lawyer pro bono projects, (3) individual pro bono activity, (4) state bar emeritus attorney rules, and (5) waiver or reduction of bar fees available to senior lawyer state bar members. This publication is a good resource for finding ideas or models from other states for use in setting up a senior lawyer pro bono project.

##### ***Standards for Programs Providing Civil Pro Bono Legal Services to Persons of Limited Means*** (American Bar Association; February 1996)

<http://www.abanet.org/legalservices/probono/standards.html>

#### V. Existing pro bono projects:

##### [International Senior Lawyers Project \(ISLP\)](#)

- Mission: "to mobilize the resources of senior attorneys to provide highly skilled volunteer legal assistance to local and international nonprofit organizations, academic institutions and governmental agencies for the purpose of advancing the rule of law, protecting human rights and promoting equitable economic development and opportunity worldwide."
- Examples of completed, current and proposed projects include assistance to the Law Revision Commission for the District of Brcko in the former Yugoslavia and the proposed creation of a Southern Africa Regional Legal Training and Professional Development Center.

##### [Law and Aging Guide](#), published by the [ABA Commission on Law and Aging](#).

- Up-to-date resource for finding existing pro bono projects at the state and local level
- State-specific guide designed to help older persons address law-related issues, so it has up-to-date listings of pro bono programs and other services benefiting the elderly.

#### VI. Resources on Practice Transition

Lynn Chard, ICLE – Resources on Closing a Practice

Austin Anderson, Planning Group Member – Resources and experience with Practice Transition