

Resources for Succession Planning and Cessation of Practice:

1. The online portal for Advance Designation of Custodian Attorney appears at the link: [Portal for Advance Designation of Custodian Attorney](#)
2. The Succession Planning Toolkit can be accessed at the link: [Succession Planning Toolkit](#)
3. Within the toolkit, a primer on cessation of practice procedure appears at the link: [Primer on Cessation of Practice Procedure](#)
4. A checklist for closing a practice appears at the link: [Checklist for Closing a Practice](#)
5. Cessation of Practice is regulated at Part 13 of the Texas Rules of Disciplinary Procedure; TRDP Part 13 can be accessed at the link under “XIII Cessation of Practice”: [TRDP Part 13](#)
 - a. Cessations ordinarily channel through the first rule (which does not envision a court proceeding): [TRDP 13.01](#)
 - b. When context proves extraordinary – as with active matters pending, no lawyer handling the matters with client consent, and there is risk of harm – any interested person can petition for a court to assume jurisdiction over the lawyer’s practice: [TRDP 13.02](#).
 - c. The third rule sets forth the procedure for Hearing and Order on an Application to Assume Jurisdiction. If the court assumes jurisdiction, it will appoint one or more Texas-licensed attorneys to be custodians of the practice: [TRDP 13.03](#).
 - d. Additionally, in some instances, a lawyer may have entered into an agreement with another lawyer to serve as custodian-attorney: [TRDP 13.04](#)
6. Chapter 456 of the Texas Estates Code addresses Disbursement and Closing of Lawyer Trust or Escrow Accounts: [Tex Estates Code Ch 456](#)
7. Opinion 627 addresses screening of closed files: [Opinion 627](#)
8. Opinion 657 addresses file screening for attorney’s eyes only content: [Opinion 657](#)
9. The Membership Department handles change of status at a lawyer’s Bar page; Membership can be reached by email at memmail@texasbar.com and by phone at 512.427-1383 or 800.204.2222 (ext. 1383).
10. Please note also that the Texas Bar Journal provides a service to publish a memorial, information on which appears at the link: [Bar Journal Memorial](#)