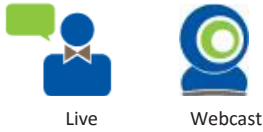


Joint program with the Sole, Small Firm and General Practice Section and The Enterprising Lawyer Series

The Enterprising Lawyer: Taking Care of Business

Series C: Winding Up Your Practice



Module 1 - Succession Planning: Buying and Selling a Law Practice

Date: Thursday, April 27, 2017 | 12:00 pm

Location: 99 Bank St. 15th Floor
Ottawa, Ontario, K1P 6B9 ([map](#))

Agenda: 12:00 pm – 12:30 pm Registration and Lunch
12:30 pm – 2:00 pm Program Including a Q & A Period



The program contains 1.5 Professionalism Hours

The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Upper Canada.

Are you interested in retiring or slowing down your practice? Or perhaps you want to transition to being your own boss with your own practice. Hear practical advice from lawyers with first hand experience with buying or selling their law firm. Our panelists will discuss finding a compatible practice, determining fair value of a law practice, hiring a professional to assist with buying or selling, negotiating the purchase price, and considering your payment options. Learn how to prepare your law practice for sale, attract and interview potential candidates, and draft the purchase agreement. Gain tips on transitioning your practice once it is sold, including law society obligations regarding trust accounts, transferring client files, communicating with clients about the transaction, and closed files.

Program Chair: **Tanya Carlton**, Tanya L. Carlton Barrister and Solicitor

Moderator: **Kathleen Robichaud**, Law Office of Kathleen Robichaud

Panelists: **Kathleen Geiger**, Geiger Law Practice Sales
Leslie Kirk, Kirk Law Office Professional Corporation
Donna Neff, Neff Law Office Professional Corporation

12:30	Opening Remarks	1:25	Helping Buyers and Sellers Find Each Other and Reach an Agreement Kathleen Geiger , Geiger Law Practice Sales <ul style="list-style-type: none">Deciding when to use a professional who assists with buying and selling practicesDetermining exactly what you are sellingAttracting potential candidates and conducting candidate interviews
12:35	Purchasing a Practice Leslie Kirk , Kirk Law Office Professional Corporation <ul style="list-style-type: none">Finding a compatible practice that meets your budget and needsDetermining fair value of a law practiceNegotiating the purchase priceConsidering various payment options	1:50	Q&A Period
1:00	Selling a Law Practice Donna Neff , Neff Law Office Professional Corporation <ul style="list-style-type: none">Preparing your law practice for saleReviewing the purchase agreementTransitioning your practice once it is soldLaw Society obligations regarding trust accounts, transferring client files, communicating with clients about the transaction, and closed files	2:00	Closing Remarks

	CBA Member
In-Person w. Lunch	\$50*
Webcast	\$50*

*plus applicable taxes

PROGRAM REGISTRATION IS ONLINE www.oba.org/pd

Questions? pd@oba.org

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