

Emergency Plan Checklist

Emergency Plan Custodian:

My computer system login and password, and the password for the Emergency Plan document have been lodged with the following person(s):

Family Member: (phone) and (email)

Pre-arranged Caretaker Attorney (if possible): (phone) and (email)

IPTA Secretariat (default)

Other (please specify):

Preferred Caretakers:

If I am unable to continue practice on a temporary basis (pre-arranged):

Caretaker Attorney Name:

Caretaker Attorney Contact Info:

Second preference:

Second Preference Caretaker Attorney Name:

Second Preference Caretaker Attorney Contact Info:

The second preference Caretaker Attorney has been notified of their inclusion in my Emergency Plan: YES/NO

If I am unable to continue practice on a permanent basis (*if different from above*):

Attorney Name:

Attorney Contact Info:

Emergency Plan Contents:

My "Emergency Plan" includes contact information for the following:

1. My PI insurance broker (as well as details of the Insurer and my Policy Number) (mandatory)
2. My Accountant (if applicable)
3. The person responsible for management of IT system (if applicable)
4. Other (please specify)

My Emergency Plan also includes clear and concise instructions on how to access the following:

5. Client contact information
6. Details of all matters for which my firm is responsible
7. Deadline management system
8. Renewals management system
9. Backup system, and
10. Accounting system.