



The Erie County Bar Foundation encourages lawyers to plan ahead by establishing a plan to protect their clients' interests in the event of disability, retirement or death. Having your registry card on file will allow us to provide contact information to clients, under such circumstances. We also have sample letters, forms and checklists on hand to help you, or your designee with the process.

- The card is for you to complete and send to the Bar Association of Erie County for filing.
- The 4 page form is for you to fill in and give to your designee. He or she will then have key information to make the transition process easier.



BAR ASSOCIATION
OF ERIE COUNTY

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438 Main Street, Sixth Floor, Buffalo, NY 14202

Telephone (716) 852-8687 • Fax (716) 852-7641 • www.eriebar.org

CONFIDENTIAL LAWYER SUCCESSION REGISTRY

This Lawyer Succession Registry Form is confidential and for information purposes only. This does not confer any legal right or responsibility to any Lawyer, Lawyer Designee, the Bar Association of Erie County or any third party. The Bar Association of Erie County is not responsible for the accuracy for the information provided herein, nor does the Bar Association of Erie County warrant the timeliness of this information.

Lawyer Name: _____

Lawyer Firm (if any): _____

Lawyer Business Address: _____

Phone: _____ Cell: _____

Fax: _____ E-Mail: _____

Home Address: _____

Home Phone: _____

Designee Lawyer

Name: _____

Address: _____

Phone: _____

Email: _____

Alternate Designee

Name: _____

Address: _____

Phone: _____

Email: _____

- Current Active Files Are Located:** Home
 Office
 Other: _____

Please provide the name, address and telephone number of one person, other than yourself, who has access, or could have access, to your current active files:

Name: _____

Address: _____

Phone: _____

Email: _____

- Closed Files Are Located:** Home
 Office
 Other: _____

Please provide the name, address and telephone number of one person, other than yourself, who has access, or could have access, to your closed files:

Name: _____

Address: _____

Phone: _____

Email: _____

Access to Lawyer Information:

Please provide the name and contact information for the person(s) with whom any passwords for your computer, combinations, keys ect. shall be located:

Name: _____

Address: _____

Phone: _____

Cell: _____

Email: _____

Name: _____

Address: _____

Phone: _____

Cell: _____

Email: _____

Location of All Wills Retained by Lawyer:

- Home
- Office
- Other: _____

Outstanding Billing:

Where and with whom is the outstanding billing of all your client matters and client property, for clients past and present located:

Name: _____

Address: _____

Phone: _____

Email: _____

Lawyer Professional Bank Accounts: (IOLA accounts, escrow accounts, operating accounts)

IOLA ACCOUNT

Name of Bank/Institution: _____

Contact Person/Agency: _____

Address: _____

Phone: _____

Email: _____

OPERATING ACCOUNT

Name of Bank/Institution: _____

Contact Person/Agency: _____

Address: _____

Phone: _____

Email: _____

Lawyer Professional Insurance: Check if not applicable or do not have

Name of Carrier: _____

Contact Person/Agency: _____

Address: _____

Phone: _____

Email: _____

Lawyer Representative/POA/Executor:

Name: _____

Address: _____

Phone: _____

Email: _____

Miscellaneous:

Have you notified your Designee Lawyer of your designation? Yes No

If yes, has your Designee Lawyer consented to the designation? Yes No

Does your Designee Lawyer have access to any special requirements to access current active files, closed files, Will, ect. such as keys, combination, storage? Yes No

Additional Information (optional):

Dated: _____

Attorney Signature

Witness Signature



BAR ASSOCIATION
OF ERIE COUNTY

CONFIDENTIAL LAWYER SUCCESSION REGISTRY

NAME: _____

ADDRESS: _____

PHONE: _____ Email _____

DESIGNEE LAWYER Name _____

Address _____

Phone _____ Email _____

EMERGENCY CONTACT Name _____

Address _____

Phone _____ Email _____

Note: Information will be stored on a database maintained by the Bar Association of Erie County.