

RESOURCES FOR LAWYERS PLANNING TO RETIRE

PRACTICE MANAGEMENT ASSISTANCE FOR ATTORNEYS PLANNING TO RETIRE

Professional Liability Fund

Practice Management Attorneys

<https://www.osbplf.org/practice-management/practice-management-attorneys.html>

16037 SW Upper Boones Ferry Road, Suite 300, Tigard, OR 97224

P.O. Box 231600, Tigard, OR 97281-1600

503-639-6911 or 800-452-1639

COVERAGE QUESTIONS, INCLUDING TAIL COVERAGE AND EXCESS

Professional Liability Fund

Primary Plan Overview: <https://www.osbplf.org/coverage/overview.html>

Leaving Private Practice: <https://www.osbplf.org/assessment-exemptions/exemptions.html>

Excess Plan Overview: <https://www.osbplf.org/excess-coverage/overview.html>

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MID-YEAR EXEMPTION FROM COVERAGE

Professional Liability Fund

Contact: Accounting Department - Direct Dial: 503-924-1771 (<https://www.osbplf.org/assessment-exemptions/midyear-exemptions.html>)

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PERSONAL ASSISTANCE FOR ATTORNEYS PLANNING TO RETIRE

Oregon Attorney Assistance Program

Attorney Counselors

<http://www.aaap.org/>

520 SW Yamhill St., Suite 1050

Portland, OR 97204

503-226-1057 or 800-321-6227

LAWYER REFERRAL SERVICE (FOR CLIENTS)

Oregon State Bar Lawyer Referral Service

<https://www.osbar.org/public/ris/>

P.O. Box 231935

Tigard, OR 97281-1935

503-684-3763 or 800-452-7636

LEGAL ETHICS QUESTIONS

Oregon State Bar Legal Ethics Helpline

<https://www.osbar.org/ethics/>

P.O. Box 231935

Tigard, OR 97281-1935

503-431-6475 or 800-452-8260

OREGON STATE BAR STATUS CHANGES

Frequently Asked Questions

<https://www.osbar.org/statuschanges/statuschangeFAQ.html>

Email regsvcs@osbar.org with additional questions

RESOURCES FOR LAWYERS PLANNING TO RETIRE

ATTORNEY RETIREMENT NOTICES

Oregon State Bar *Bulletin*

<https://www.osbar.org/publications/bulletin/bulletin.html>

P.O. Box 231935

Tigard, OR 97281-1935

503-620-0222 or 800-452-8260

Contact: Editor

IOLTA COMPLIANCE

Compliance: <https://www.osbar.org/IOLTA>

FAQ: <https://www.osbar.org/IOLTA/faq.html>

503-620-0222 or 800-452-8260

DISPOSITION OF CLOSED ATTORNEY FILES

Oregon State Bar Regulatory Services

P.O. Box 231935

Tigard, OR 97281-1935

503-620-0222 or 800-452-8260

- If you are changing your bar membership status, and someone else will be storing your closed files, you will notify the bar of the location as part of your status change application at <https://www.osbar.org/statuschanges/statuschangeFAQ.html>.
- If you are maintaining active bar membership status, and someone else will be storing your closed files, notify the bar of the location via email to regsvcs@osbar.org.

ABA COMMISSIONS AND DIVISIONS

- The Commission on Law and Aging (https://www.americanbar.org/groups/law_aging/)
- Senior Lawyers Division (https://www.americanbar.org/groups/senior_lawyers/)

ABA BOOKS AND VIDEOS

- *The Lawyer's Retirement Planning Guide* (<https://www.americanbar.org/products/inv/book/227739316/>)
- *ABA/AARP: Get the Most Out of Retirement: Checklist for Happiness, Health, Purpose and Financial Security* (<https://www.americanbar.org/products/inv/book/252178854/>)
- *Passing the Torch Without Getting Burned* (<https://www.americanbar.org/products/inv/book/214260/>)
- *Period. New Paragraph.* (<https://www.americanbar.org/products/ecd/vppv/250111635/>)
- *The Lawyer's Guide to Succession Planning: A Project Management Approach for Successful Law Firm Transitions and Exits.* (<https://www.americanbar.org/products/inv/book/235511823/>)

ABA web store products may be purchased at a discount using the Professional Liability Fund's promotional code OSBPLF. For more information, visit the PLF Website, www.osbplf.org.

IMPORTANT NOTICES

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