

# My Lawyer Life



A BLOG FOR LAWYERS

## SO, YOU WANT TO START A LAW FIRM?

Starting a law firm can be overwhelming, so I thought I would share my start up checklist with you. Hopefully this will help you along your journey!

### Initial Questions

- Why are you starting a law firm?
- What type of law will you practice? What solution are you offering?
- Who is your ideal client? Who will you be marketing to?
- In what counties do you want to practice?
- How much capital do you have to invest?
- What do you want your business name to be?
- What type of entity do you want to form?
- If LLC, S-Corp election?
- What will your mission statement be? Firm values? Slogan?

### Business Formation & Compliance

- Create your business name.
- Texas Secretary of State - File Certificate of Formation
- Internal Revenue Service - Apply for a FEIN number

### The Basics

- Create your business logo
- Register a domain name
- Choose a website service
- Professional email address
- Professional phone number
- Professional fax number
- Business mailing address
- Business Equipment
  - Computer
  - Printer
  - Scanner
  - Office Supplies
  - Reference Materials

## Financials

- Banking
  - Create an IOLTA Trust Account
  - Create an Operating Account
  - Order Checks for Operating Account
  - Apply for Funding
- Payment Software
- Bookkeeping Software
- Accountant / Bookkeeper / CPA
- Excel Sheets

## Software & Services

- Case Management Software
- Microsoft 365 or Mac Equivalent
- Zoom / Microsoft Teams
- Adobe PDF DC Pro or Equivalent
- Malpractice & Cyber Insurance
- Cloud Storage
- Anti-Virus Protection
- Calendar & Checklists
- Appointment Scheduling
- Virtual Receptionist
- Additional Software
  - Grammarly
  - Password Manager
  - Notarize
  - HelloSign
  - Canva
  - Date Calculator

## Marketing, Advertising, & Referrals

- Design Your Website
- Order Promotional Materials – Business Cards, Return Address Labels (or a stamp), Pens, etc.
- Create an email signature
- Create a letterhead template using your firm's logo
- Create Public Profiles
- Create Social Media Profiles
- Begin Advertising Campaigns (requires purchase)
- Sign Up for Referral Services
- Sign Up for Legal Insurance Programs

- Sign Up for Pro Bono Work
- Submit Court Appointment Applications
- Apply for Memberships
  - Texas Bar College (30 CLE credits annually)
  - Texas Pro Bono College (75+ pro bono hours annually)
  - Texas Young Lawyer's Association
  - Dallas Bar Association
  - Dallas Association of Young Lawyers
  - Dallas Women Lawyers Association
- Take Headshots
- Update Your Resume
- Scan Your Driver's License ID & Bar Card