

Succession Planning for Your Practice

OBA Enterprising Lawyer



Online



In-person

Date: Thursday, June 26, 2025 | 9:00 am to 1:00 pm
Location: OBA Conference Centre 20 Toronto Street, 2nd Floor,
Toronto

Program Chair: [Lisa Laredo, Laredo Law PC](#)



Professionalism Hours: This program contains up to **3h 00m**.
The OBA has been approved as an Accredited Provider of Professionalism Content by the Law Society of Ontario

Many lawyers delay succession planning until the last minute, thereby increasing the potential for professional and reputational risk. With early planning, you can leave the practice of law on your own terms, protect your clients and support the next generation of lawyers coming behind you.

So whether you are ready to start taking steps towards retirement, or simply want to ensure you are well prepared for your future, join us for this valuable event as we unravel the key issues, professionalism obligations and strategic considerations for selling or winding up your practice.

Then share your experience and insights as you connect with attendees of our **Buying a Law Practice and Practicing in a Small Town** event for informal mentorship, networking and lunch. You might just meet someone looking to purchase a law practice or create a meaningful mentorship relationship with a younger member of the bar.

NOTE: This program will focus on preparing for an intentional closing or sale of your practice. If you are looking for information about preparing for an unexpected inability to practice arising from death or incapacity, we invite you to view our on-demand offerings on the Law Society’s mandatory Client Contingency Plan requirement: [New LSO Client Contingency Planning Requirement](#) and [The Latest Guidance on the LSO’s New Contingency Planning Requirements](#).

9:00am	Welcome and Opening Remarks	
9:05am	Financial Planning – Preparing for Retirement Pam Lajoie, Lawyers Financial Advisory Services Inc. Gather helpful advice on preparing for and managing your finances during retirement.	<ul style="list-style-type: none">• Dealing with client documents and files• Handling leases and other vendor contracts• Trust account reconciliation and other LSO requirements
9:35am	Succession Planning Options and Strategic Decision Making Saša Jurovicki, JSP Accounting PC Alfred Kwinter, Singer Kwinter <ul style="list-style-type: none">• Should you sell or wind up your practice?• What are the pros and cons of each approach?• Important considerations for determining the best course of action for your practice• Handling the emotional and identity considerations of leaving law	10:45am Networking Break
9:55am	Winding Up Your Practice Saša Jurovicki, JSP Accounting PC Victoria Uslinov, Law Society of Ontario <ul style="list-style-type: none">• Timeline and strategic considerations• Essential client communications	11:00am Buying or Selling a Law Practice Kathleen Geiger, Geiger Law Practice Sales Saša Jurovicki, JSP Accounting PC Victoria Uslinov, Law Society of Ontario Jacob Murad, KPA Lawyers <ul style="list-style-type: none">• Valuing a legal practice• Finding the right match and due diligence considerations• Negotiating and structuring the deal – options and opportunities• Preparing a transition plan• Essential LSO requirements
		12:00pm Mentorship and Networking Lunch
		1:00pm Program Concludes