

# Transfer memo to file or new lawyer

**Memo to:**     *[File, new lawyer name]*

**Client Name:**

**File Name:**

**File Number:**

**Date:**

**Important to Note:** *[limitation periods, appearance dates, and outstanding obligations]*

**Retainer:**             I was retained by *[client]* on *[date]* with respect to the following:  
*[list all items, include original retainer letter to client or retainer agreement signed by client]*

**Summary:**             A summary of the history of this matter is as follows:  
*[summarize facts and history of matter to present; include details of litigation, negotiations, etc.]*

**Client Position:**     The client's position on each issue is:  
*[summarize the client's position on each issue of the matter, any changes, etc.]*

**Opposite Position:**   The opposing side's position on each issue is:  
*[summarize the opposing side's position on each issue of the matter, any changes, etc.]*

**Other Information:** Additional relevant information about this matter includes:

*[summarize any other information that may be relevant or of assistance]*

**File Transfer:** I have transferred the file to you per *[client's instructions or sale or transfer of the practice to the new lawyer]*.

*[include copy of the client's authorization/direction to the transfer of the file or, where the client could not be reached, copy of the notice of transfer sent to the client ]*