

Lateral Partners Moves – Principles for Transition
By Barry A. Hartstein

LATERAL PARTNER MOVES
PRINCIPLES FOR TRANSITION

1. You should not contact your clients and inform them of your planned departure until you inform the Exiting Firm of your plans to leave the firm. You should not solicit clients until you leave the Exiting Firm.
2. You should not contact employees of the Exiting Firm and inform them of your planned departure, until you inform the Exiting Firm of your plans to leave the firm. You should not solicit any employees until you leave the Exiting Firm.
3. You should not copy or take any client files. If a client authorizes you to work on the files at the New Firm, you should follow the usual protocol to ensure a proper transfer of the files.
4. You should refrain from downloading anything from your computer, except purely personal items.
5. You should not enter the Exiting Firm offices at unusual times, such as late in the evening.
6. You should not send yourself any emails containing attachments that constitute client or firm proprietary information.
7. When you resign, you should turn in your Blackberry and any other firm equipment.
8. If you take anything out of your office when you resign, such as personal items, you should give someone there an opportunity to review what you are taking.
9. You should also carefully review any information on your home computer and check to see what firm or client documents, if any, you have at home. Any paper documents should be returned to the office prior to your resignation, other than documents that you would be entitled to retain. Any computer files should be deleted from your home computer before resignation. (The computer will automatically record what you deleted and when).
10. Finally, avoid making gratuitous remarks or statements (oral or written) that might offend Exiting Firm partners. If asked your reasons for leaving, you should offer a neutral response, such as, "I am interested in exploring new opportunities . . ."