

RESOURCES FOR LAWYERS PLANNING TO RETIRE

OREGON ATTORNEY ASSISTANCE PROGRAM

<https://oaap.org/>

Oregon Attorney Assistance Program (OAAP)

<https://oaap.org/contact-us/>

520 SW Yamhill St., Suite 1050

Portland, OR 97204

503-226-1057 or 800-321-6227

OREGON STATE BAR

<https://www.osbar.org/index.html>

IOLTA COMPLIANCE

P.O. Box 231935

Tigard, OR 97281-1935

503-620-0222 or 800-452-8260

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

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

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.

LAWYER REFERRAL SERVICE (FOR CLIENTS)

Oregon State Bar Lawyer Referral Service

P.O. Box 231935

Tigard, OR 97281-1935

503-684-3763 or 800-452-7636

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

LEGAL ETHICS QUESTIONS

Oregon State Bar Legal Ethics Helpline

P.O. Box 231935

Tigard, OR 97281-1935

503-431-6475 or 800-452-8260

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

MEMBERSHIP STATUS CHANGES

Oregon State Bar

P.O. Box 231935

Tigard, OR 97281-1935

503-620-0222 or 800-452-8260

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

PRO BONO INFORMATION

RESOURCES FOR LAWYERS PLANNING TO RETIRE

Oregon State Bar
P.O. Box 231935
Tigard, OR 97281-1935
503-620-0222 or 800-452-8260
<https://www.osbar.org/probono/>

PROFESSIONAL LIABILITY FUND

<https://www.osbplf.org/>

COVERAGE QUESTIONS, INCLUDING TAIL COVERAGE AND EXCESS

Professional Liability Fund

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

PO Box 231600, Tigard, OR 97281-1600

503-639-6911 or 800-452-1639

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>

MID-YEAR EXEMPTION FROM COVERAGE

Professional Liability Fund

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

PO Box 231600, Tigard, OR 97281-1600

503-639-6911 or 800-452-1639

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

PRACTICE MANAGEMENT ASSISTANCE

Professional Liability Fund

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

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

PO Box 231600, Tigard, OR 97281-1600

503-639-6911 or 800-452-1639

RECORDED CLES AVAILABLE ON THE PLF WEBSITE, www.osbplf.org

- *The Next Stage: Planning NOW for the Retirement that YOU Want*
- *Health Insurance Today, At Sixty-Five and In Retirement*

ARTICLES AND FORMS AVAILABLE ON THE PLF WEBSITE, www.osbplf.org

- *Checklist for Lawyers Planning to Retire*
- *Resources for Lawyers Planning to Retire*
- *Checklist for Lawyers Planning to Sell Their Law Practices*
- *Resources for Lawyers Planning to Sell Their Law Practices*
- *Checklist for Closing Your Own Office*
- *Closing Your IOLTA Account - Information*
- *File Retention and Destruction Guidelines*
- *Letters for Closing Your Law Office*

AMERICAN BAR ASSOCIATION

<https://www.americanbar.org/>

ABA COMMISSIONS AND DIVISIONS

The Commission on Law and Aging

RESOURCES FOR LAWYERS PLANNING TO RETIRE

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/>

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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