



The
DISCIPLINARY BOARD
of the Supreme Court of Pennsylvania

SUCCESSION PLANNING DATA **ATTORNEY REGISTRATION 2023-2024**

October 30, 2023 | Harrisburg, Pennsylvania

The Disciplinary Board believes that succession planning is essential to every attorney's practice. Recognizing that the future is unpredictable, attorneys should strive to lessen the impact of unexpected interruption in their relationships with clients by taking protective measures. During the 2023-2024 annual attorney registration period, the Disciplinary Board surveyed Pennsylvania attorneys regarding their plans to protect client interests in the event of the attorney's death or disability. The question was designed for informational purposes only as failure to have a designated successor is not a violation of the Rules of Professional Conduct or the Pennsylvania Rules of Disciplinary Enforcement. The Board requests attorneys notify the Attorney Registration Office of any change to the provided information should such a change occur prior to the next registration period.

Attorneys were provided the following options for response:

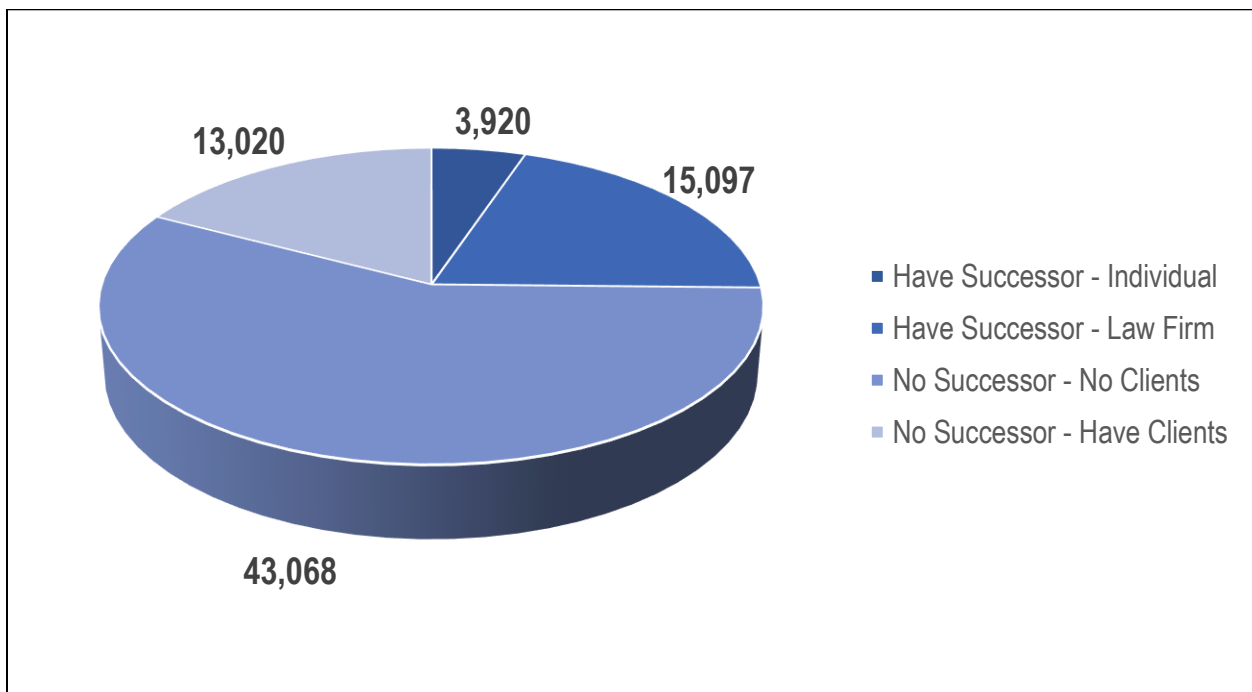
- *In the event of my death or incapacity, I have made arrangements for another Pennsylvania attorney, who is capable of conducting and/or overseeing my legal practice, to protect the interests of my client(s). My designated successor is:*
 - *An Individual; or,*
 - *A Law Firm.*
- *I do not have a designated successor because I do not have private clients in Pennsylvania.*
- *I do not have a designated successor and I do have private clients in Pennsylvania.*

The table and graph below reflect the data on Pennsylvania attorneys who are registered as Active (which includes the following statuses: Active, In-House Corporate Counsel, Defender or Legal Services Attorney (Temporary Licensee), Foreign Legal Consultant, and Attorney Spouse of an Active Duty Service Member), Inactive, Emeritus, or Retired.

Table 1. Succession Planning Responses from All Registered Pennsylvania Attorneys.

Response	Total	%
I have a successor attorney. My successor is an individual.	3,920	5.22 %
I have a successor attorney. My successor is a law firm.	15,097	20.10 %
I do not have a successor because I do not have private clients in PA.	43,068	57.34 %
I do not have a successor and I do have private clients in PA.	13,020	17.34 %
TOTAL	75,105	100.00 %

Graph 1. Succession Planning Responses from All Registered Pennsylvania Attorneys.



The table and graph below reflect the data received from attorneys who are registered as Active, which includes the following statuses: Active, In-House Corporate Counsel, Defender or Legal Services Attorney (Temporary Licensee), Foreign Legal Consultant, and Attorney Spouse of an Active-Duty Service Member.

Table 2. Succession Planning Responses from Active Pennsylvania Attorneys.

Response	Total	%
I have a successor attorney. My successor is an individual.	3,838	6.04 %
I have a successor attorney. My successor is a law firm.	14,898	23.45 %
I do not have a successor because I do not have private clients in PA.	32,145	50.60 %
I do not have a successor and I do have private clients in PA.	12,645	19.91 %
TOTAL	63,526	100.00 %

Graph 2. Succession Planning Responses from Active Pennsylvania Attorneys.

