

Year-End Closing Checklist

Work matter by matter. Ops surfaces and lists; the attorney decides.

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Firm / office:

Year ending:

- ☐ **1. Status sweep** **Notes:**
Every open matter reviewed: genuinely active, ready to close, or dormant?
Attorney decides; ops flags and lists.
- ☐ **2. Carryover check** **Notes:**
Every deadline crossing into January is captured, owned, and buffered.
Ops surfaces; the attorney owns the deadline.
- ☐ **3. Stale review** **Notes:**
Matters with no activity in ____ months listed for a keep-or-close decision.
Attorney decides; ops surfaces the list.
- ☐ **4. Closing steps** **Notes:**
For matters the attorney closes, the closing steps were completed.
Attorney directs; ops confirms done.
- ☐ **5. Data cleanup** **Notes:**
Statuses, contacts, and matter numbers current; closed matters archived.
Ops executes; nothing legal involved.

Completed by (ops):

Attorney sign-off:

Date:

This checklist supplements, never replaces, official docketing. FirmFooting is not a law firm and does not provide legal advice.

This checklist holds matter numbers and status metadata only, never privileged content.

The attorney owns the law, the official docket, and every legal judgment. Matter numbers and metadata only.