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COMMUNICATIONS AND ORGANIZATIONAL MANAGEMENT

## Critical Moves to Make When a Partner Leaves

How firms approach the aspects of a partner's departure can minimize — or escalate — the potential fallout.

BY ERIN BRERETON

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### Partner departures — due to retirement, a new job or another reason — can be costly for law firms.

Nearly 90% of partners say their book of business is portable, according to [research](#) from legal tech provider SurePoint. Depending on an attorney's tenure, the loss could be particularly painful.

A 2024 Major, Lindsay & Africa survey found partners who'd been in the role for 11 to 20 years produced client originations that had **more than three times the value** than the ones generated by attorneys who'd been a partner for five years or less.

Even if partners don't walk away with a big chunk of the firm's business, their exit can complicate existing client relationships.

Firms that fail to buffer the impact could face debilitating outcomes — from having less institutional knowledge to a drop in financial performance, according to Laurence Stybel, Co-Founder of professional service outplacement and leadership coaching provider Stybel, Peabody & Associates.

"There is an abrupt transition of the relationship between the partner and more junior [attorney taking over]," Stybel says. "The knowledge isn't [lost] so much on the firm side; it's on the client side — how the client likes things done, things that upset the client."

### Informing Stakeholders a Partner Is Leaving

The key to maintaining business continuity can lie in a firm's ability to swiftly shift a departing partner's responsibilities.

Laredo, Smith & Kane has had more than a year to prepare for former Managing Partner Marc Laredo to leave the firm — in mid-2024, Laredo told his colleagues he planned to launch a mayoral campaign in Newton, Mass., but would work full-time until taking office in January 2026.

Matthew A. Kane and another partner took over the daily management of the firm, which allowed them to get used to performing the work and learn from Laredo.

"It's been a lot of communicating with clients and getting everyone prepared for the transition," he says. "He's got a number of clients who are small businesses [and] just have periodic and sporadic needs; we made a concerted effort to reach out to them. We've had dozens of handoff meetings. We want to get them on Zoom and introduce people to new people."

In addition to familiarizing clients with other attorneys, the firm worked to transfer Laredo's referral relationships by having firm members get to know the contacts at in-person coffee and lunch meetings.

"We knew a lot of the same people; but we want to try to continue those relationships, which might be mutually beneficial for the other side of that relationship, as well," Kane says.

Long before the Nov. 4 election, the firm began examining what changes should take place, such as obtaining new business collateral, if the firm removed Laredo's name for ethical reasons. When he won, the firm's leadership was prepared to flip the switch, Kane says.

"That's one more aspect of having a long runway; that stuff takes time," he says. "[Changing the] website domain; logos; physical sign; letterhead; any kind of brand-related stuff; LinkedIn profiles — [we were] cataloging all the places we need to be thinking about."

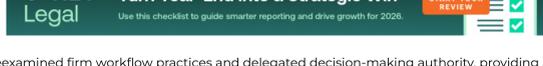
Zach Gold assumed leadership of Cruz Gold & Associates in a somewhat shorter timespan, becoming its managing partner soon after his mother, the New Jersey law firm's founder, passed away in 2023.

In the months beforehand, though, as she navigated hospitalizations and treatments, Gold had begun handling more of her duties and siphoning some of his previous tasks to team members.

"She was managing her illness for a while, and I gradually took on more responsibility in client communication, staffing and case management before stepping into the role formally," he says. "It wasn't a formal transition plan — more of a gradual shift born out of necessity."

A week after his mother's funeral, Gold held an in-person meeting with the immigration law firm's employees to talk through what the leadership transition would involve.

"My mother's long battle with breast cancer had prepared us in some ways; the team knew this day might come, and many had already stepped up to help her in her final year," he says. "While it was emotional, it wasn't a shock."



As Gold reexamined firm workflow practices and delegated decision-making authority, providing a sense of stability for clients and staff remained a priority — which he worked to achieve through open and transparent communication.

"We began notifying clients about a week later," he says. "I sent a firm-wide email, personally signed by me and the partners, sharing the news and assuring clients the firm's operations and values would continue uninterrupted. For long-term and high-priority clients, I followed up individually, by phone where possible, to thank them for their trust and explain how we'd ensure continuity in their cases."

### Planning Ahead for Partner Transitions

Law firms may at times have only a couple of weeks to mount a response after a partner gives notice.

Even if the news is sudden, their reaction doesn't have to be. Proactively preparing for the possibility can position organizations to act quickly if the need arises. Law firms' current efforts to identify and train internal talent, however, seem to be mixed.

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Although 78% give younger partners opportunities to serve in executive and management committee, department and practice chair, and other leadership roles, less than a quarter [provide leadership and management training to all firm partners](#), according to advisory and accounting firm Withum's most recent law firm leadership report. Less than a third (30%) have a written succession plan in place. Recently, the New Jersey Supreme Court announced private practice attorneys in the state will be [required to disclose the status of succession plans](#) they've created to address client needs if they become incapacitated, disbarred or otherwise aren't able to practice starting in 2026.

A New York criminal defense firm, the Law Offices of Robert Tsigler, experienced several partner departures in the past decade. When one occurs, principal Robert Tsigler has found that involving the successor in aspects such as client communications and billing management can enhance client confidence and trust during the transition.

"For our clients, a change in attorney mid-case is not simply an annoyance but can affect their freedom," Tsigler says. "The principal consideration must be the stabilization of the files in [the attorney's] control."

When a partner announces plans to leave, the firm enacts a series of steps devised to ensure the transition is smooth.

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Leadership promptly reviews the person's specific case requirements to determine if the role needs to quickly be filled. If it does, Tsigler says he may promote a senior associate with the necessary trial skills or instead seek outside talent if a distinct specialization is needed, such as proficiency in a certain area of criminal immigration law.

To get the new hire up to speed on the firm's defense philosophy and crucial case information, Tsigler provides case files and detailed strategy memos — which he calls trial blueprints — that list a client's full story and goals.

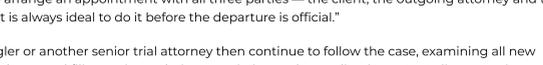
"We describe everything we obtain, such as weaknesses in the discovery we will seek to take advantage of," Tsigler says. "The memo outlines the legal arguments in question, case law and a roadmap on future court appearances. It also contains contact details of opposing counsel."

As part of an internal case review, the firm asks the new partner to deliver the defense plan. When Tsigler is confident the person is ready, client introductions take place, giving clients a sense of the new attorney's competency and an opportunity to form a natural rapport.

"Only after a tangible plan of transition is made [should] clients be informed," he says. "Publicizing the exit without a plan is introducing a lot of panic that people are already experiencing under the pressure of extreme stress. We arrange an appointment with all three parties — the client, the outgoing attorney and the new attorney. It is always ideal to do it before the departure is official."

Either Tsigler or another senior trial attorney then continue to follow the case, examining all new correspondence and filings prior to their transmission and attending important client meetings and shadow court appearances.

"It gives us an inevitable second pair of eyes to ensure that our standards of aggressive defense are upheld," he says.



### Effectively Overseeing Change in Partnership

If law firm leadership is worried partners might be on the verge of leaving, their concerns aren't necessarily unfounded.

The number of partners who moved to another firm rose 6% between 2023 and 2024 — the biggest volume increase in any lateral move category and highest partner departure volume the industry has seen in the past four years, according to [research](#) from legal hiring due diligence provider Decipher Investigative Intelligence.

In some instances, multiple partners or an entire practice group may depart at the same time. In mid-2024, Reuters said **20 or more partners** from Holland & Knight had joined Polsinelli Law Firm's new Philadelphia office; just a few months prior, the news service had reported 10% of Munger, Tolles & Olson's partners went to Baker McKenzie.

Given that [research](#) from business strategy data provider Pircal revealed a number of the partners who left Am Law 100 firms between 2020 and 2024 eventually returned, firm leadership may want to try to make attorney departures a civil affair.

Stybel, Peabody & Associates was once hired by a Boston-based law firm to help phase out its underperforming real estate practice — comprised of three partners who had less business because the bank they'd primarily been working with stopped issuing deals due to a downturn.

"As the managing partner of this firm said, you still have an impact because of the people you know in the legal community and your ability to speak well or ill of us," Stybel says. "It's important to treat your departing partners and associates with respect."

The managing partner assured each of the real estate practice partners they weren't at fault but told them the reality was the firm needed to free up financial resources to attract lateral bankruptcy partners, according to Stybel.

"[He said], 'We have to make this hard decision; but we want to treat you with respect and help you have a soft landing,'" Stybel says.

His company worked with the partners to help them find other employment. Two set up private practices. The third made a career change, based on tests that revealed additional interests and abilities.

An equity partner's exit can have financial ramifications; firms should consider whether they'll be able to tap into cash reserves or would be comfortable obtaining external financing if one occurs.

Establishing a well-defined partnership agreement — which clearly outlines what steps the firm will take — can help prevent future conflicts.

Laredo, Smith & Kane's operative agreement has been in place for years, Kane says, and was well-suited to address the circumstances surrounding Laredo's departure.

"From time to time, as equity partners have come and gone, there have been discussions, revisions and tweaks," he says. "When the partnership changes, we take an opportunity to go through the agreement and make sure everyone's comfortable and talk about anything that might need to change."

Tsigler also relies on the agreement his firm has created to ensure partner departures won't cause troublesome issues like case delays.

"The clients are not shares to be split," he says. "We make sure equity talks do not postpone client meetings and passing strategic information."

### Learn More About Succession Planning with *Legal Management Talk*

**ALA's podcast sat down with Debbie Foster and attorney David Wood for two informative conversations about succession planning. Check them out today: The Attorney Journey and Crafting an Effective Succession Plan.**

#### ABOUT THE AUTHOR



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