|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Inquiry** | **Yes** | **No** | **N/A** | **Notes/Comments** | **Note improvements needed & dates for****follow up** |
| **Partnerships and Shared Practices** |
| **1.** Does your partnership agreement provide for:**a.** Compensation? | [ ]  | [ ]  | [ ]  |  |  |
| **b.** Capital investment? | [ ]  | [ ]  | [ ]  |  |  |
| **c.** Specific partner responsibilities (i.e., administrative, rain making, etc.)? | [ ]  | [ ]  | [ ]  |  |  |
| **2.** Is your partnership agreement reviewed on an annual basis? | [ ]  | [ ]  | [ ]  |  |  |
| **3.** Does your firm set aside dedicated time for a firm retreat to promote congeniality among partners and develop strategic plans? | [ ]  | [ ]  | [ ]  |  |  |
| **4.** Do you have a written agreement with an Of Counsel member of your firm? | [ ]  | [ ]  | [ ]  |  |  |
| **5.** Do you meet informally with your partner(s) on a frequent basis about firm issues? | [ ]  | [ ]  | [ ]  |  |  |
| **6.** Do you have a checks and balances system so no one partner has the sole responsibility for a particular area? | [ ]  | [ ]  | [ ]  |  |  |
| **7.** Do you have an agreed upon process to resolve disputes or disagreements among partners? | [ ]  | [ ]  | [ ]  |  |  |