

What Comes Next

A Post-Divorce Client Handoff Checklist for Law Firms

A divorce matter may be concluding while important client responsibilities, deadlines, and next steps remain.

A structured handoff can help ensure those remaining items are clearly identified, communicated, and documented before the matter closes.

Use this checklist to review the client handoff at the conclusion of a divorce matter.

01

Identify what remains

What still needs to happen after the matter concludes?

- Remaining client actions and obligations are clearly identified
- Important dates and deadlines are captured
- One-time tasks are distinguished from ongoing obligations
- Relevant firm-approved guidance is included where appropriate

02

Clarify responsibility

Is it clear who owns each remaining action?

- Client responsibilities are clearly identified
- Firm responsibilities are distinguished from client responsibilities
- Third-party involvement is noted where applicable
- The client knows where to direct questions about remaining items

03

Make timing clear

Does the client know what needs attention now - and what comes later?

- Time-sensitive actions include a due date or target date
- Longer-term obligations and important future dates are identified
- Dependencies between actions are clear where relevant
- Immediate priorities can be distinguished from future tasks

04

Make the handoff actionable

Can the client readily understand what to do next?

- Next steps are written in clear, client-friendly language
- Supporting information or guidance is provided where appropriate
- Remaining tasks are organized rather than scattered across emails and documents
- The client has a clear reference for what remains after the matter concludes

05

Confirm the handoff

Is there a clear transition from the firm's work to the client's remaining responsibilities?

- The client receives the final handoff or action plan
- Receipt or acknowledgment is documented
- The client has an opportunity to raise questions about remaining next steps
- The date of the handoff is recorded

06

Preserve the record

Could the firm readily determine what was provided to the client later?

- The remaining items communicated to the client are documented
- The responsible attorney is identifiable
- The handoff date is retained
- The final client handoff can be referenced if questions arise later

The matter may be closed. The client's next steps aren't.

A consistent handoff process can give clients greater clarity about what remains while giving the firm a structured record of what was provided when the matter concluded.

Hello Tapped gives family law firms a structured way to turn remaining post-divorce next steps, responsibilities, important dates, and firm-approved guidance into one clear, matter-specific client action plan.

HelloTapped.com

This resource is provided for general informational purposes only and does not constitute legal advice. Law firms should establish their own matter-closing and client-handoff procedures based on their professional obligations, internal policies, and applicable law.