South Carolina Bar
Tips and To Dos for Opening a Law Office in South Carolina

NOTIFICATIONS AND REGISTRATIONS

- ☐ Provide SC Supreme Court with correct contact info by logging into your AIS (Attorney Information System) account https://ais.sccourts.org. SCACR 410(g) mandates that lawyers update their contact information within five (5) days of any change. The South Carolina Bar, the Bar Foundation, and the Commission on CLE are automatically notified when you update your status and address in the AIS system. For assistance using AIS, call (855)235-2500 or email aissupport@sccourts.org.) While you're at sccourts.org, sign up for email notifications to stay informed of Court news.
- ☐ Choose a firm name. In AIS, if your firm is new, the firm name will not appear in the drop-down list in AIS and you must submit it to be added. In SC, the Bar does not need to approve your firm name but it should comply with the South Carolina Rules of Professional Conduct for firm names. (SCRPC 7.5)
- ☐ Incorporate with the SC Secretary of State (forms online). You do not need to file a copy with the SC Bar.
- ☐ Choose an office location. If sharing an office, consult ethics rules and opinions.
- ☐ Obtain city and/or county business license for your office
- ☐ Rent a Post Office Box. It offers better security for receiving mail.
- ☐ Apply to be a Notary https://sos.sc.gov/services-and-filings/notaries
- ☐ Order Business Cards
- ☐ Purchase a domain name for email and firm website (domain name and website name must comply with SCRPC on Lawyer Advertising)
- ☐ Choose a website designer. Supervise design and content under SCRPC 5.3 and SCRPC 7.1 – 7.5 (Lawyer Advertising).
- ☐ Join an SC Bar Section to take advantage of SC Bar Connect and networking
- ☐ Sign up for SC Bar Lawyer Referral Service (need 2 years of legal experience)
- ☐ Make an agreement with another lawyer to be your emergency backup or successor. Add their name to the Successor Registry on SCBar.org or on your annual license fee statement.
- ☐ Make a checklist to help a successor or receiver quickly and temporarily act in your place and touch base with your backup at least annually.

LAW OFFICE FINANCIALS

- ☐ Seek expert advice from a CPA and/or business lawyer

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- ☐ Open an operating/business checking account. If you will hold money in trust, open a trust account (IOLTA). The SC Bar Foundation handles IOLTA https://scbarfoundation.org/iolta/. Their website has forms and a list of eligible banks.
- ☐ Give your bank the IOLTA Enrollment Form and bank directive regarding reporting insufficient funds to the ODC and keep copies (sample NSF letter https://www.scbar.org/for-lawyers/quicklinks/practice-management/forms/ in Forms)
- ☐ Rent a safe deposit box at your bank (optional)
- ☐ Apply for a firm credit card
- ☐ Order checks and deposit slips. Order different colored checks for operating account and trust account.
- ☐ Open a law firm credit card merchant account for client payments (ask LawPay for the discount available to Bar members). Most practice management software now includes payment processing designed for lawyer trust accounts.
- ☐ Purchase the book *Trust Accounting for South Carolina Lawyers* (2021) by Barbara M. Seymour from the SC Bar Book Store which has many helpful SC law publications
- ☐ Consider purchasing practice management software with accounting functions.
- ☐ Review SCACR 407 (R. 1.15 Safekeeping Property), SCACR 417 (Financial Recordkeeping), SCACR 412 (IOLTA)

TECHNOLOGY AND SUPPLIES

- ☐ Purchase computers, monitors, accessories. SC Bar discount available through Lenovo www.lenovo.com/statebar
- ☐ Purchase or lease a photocopier/high volume scanner/printer (a lease can include service, toner and supplies)
- ☐ Purchase a shredder
- ☐ Contract with an Internet Service Provider (ISP) and other utilities
- ☐ Choose a phone service (most small firms choose a VoIP system for cost savings)
- ☐ Decide how you will get messages (phone answering system, answering service, or virtual receptionist service)
- ☐ Purchase a domain name and choose a business email address (subscription Microsoft 365 or Google Workspace includes email hosting)
- ☐ Choose a mail service such as Stamps.com or USPS.com
- ☐ Consider practice management software such as Clio, Smokeball, Practice Panther, MyCase or CosmoLex. Ask any software company if there's a discount for SC Bar members or if they will match competitor's discounts.

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RESEARCH

- ☐ State and federal law *free* for Bar members with vLex Fastcase legal research. vLex also offers supplemental legal resources for an added cost, including Vincent AI and many SC Bar digital publications.
- ☐ Shop SC Bar Book Store for SC law books

INSURANCE PROTECTION

- ☐ Health, Dental, Life and Disability insurance https://siconsultants.com/south-carolina-bar/
- ☐ Professional (malpractice) liability – three insurers are listed on the Bar's website or contact an independent insurance agent for options
- ☐ Cybersecurity, Business Interruption, Loss of valuable documents
- ☐ Auto insurance for business use
- ☐ Property (liability, wind, fire, earthquake, flood, etc.)

Contact the SC Bar's Practice Management Assistance Program (PMAP) with your law practice and risk management (legal ethics) questions. pmap@scbar.org

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