(Rev. 11-2023)

**\*\*\*, ESQUIRE**

**Conservator for \*\*\***

**[Address]**

**\*\*\*\*\*\*\*\*\*\*\*\*, PA \*\*\*\*\***

**(\*\*\*) \*\*\*-\*\*\*\* (phone)**

**(\*\*\*) \*\*\*-\*\*\*\* (fax)**

**Email: \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\***

\*\*\*\* [DATE] \*\*\*\*

**PERSONAL AND CONFIDENTIAL**

[\*\*\*Name of Client

Address]

**[**The name of the client and mailing address are not required on this letter if it is being addressed generally to “Dear Client of \_\_\_\_.” However, the client’s name (and, of course, address) must appear on the envelope, along with the words, “**PERSONAL AND CONFIDENTIAL**,” and you must retain a copy of the envelope so you have a record of the name of the client to whom the letter was sent and the address to which the letter was sent.**]**

RE: ***In the Matter of \*\*\****, ***Esquire, Deceased***

Misc. No. XXXXXXXX (CCP \*\*\*\*\*\*\*\* County)

Dear Mr./Ms. \*\*\*:

***Or***

Dear Client of \*\*\*:

The Disciplinary Board of the Supreme Court of Pennsylvania has been notified that \*\*\*, Esquire, a member of the Pennsylvania Bar, passed away on \*\*\*. On \*\*\*, the Court of Common Pleas of \*\*\* County appointed me to act as Conservator of the case files of Attorney \*\*\* in order to protect the legal interests of [his/her] clients. From my examination of Attorney \*\*\*’s office files, it appears that at one time, Attorney \*\*\* represented your interests with respect to one or more legal matters, and [he/she] has been maintaining a file relating to your case. It is my responsibility to notify you of the closing of [his/her] law practice and to inform you that the confidential legal file has been secured and is being made available for you to retrieve.

As the Conservator, I have taken physical custody of all case files from Attorney \*\*\*’s law office. To protect your privacy regarding your legal matter, I must return your case file to you. In order for me to return the file to you, you must fill out the authorization enclosed with this letter and fax it to the number, or mail or email it to the street or email address, listed on the authorization **within 30 days of the date of this letter.** Make sure all clients involved in your case (for example, husband and wife) sign this authorization. In addition, please attach to the authorization a photocopy of your driver’s license or other form of identification. We need a copy of your identification to ensure that our office returns the file only to you, the client.

After receipt of this authorization, my office will mail the file by UPS or Federal Express to the address you list on the authorization. If you have already retained substitute counsel and want your file sent to your new attorney, please provide the name, mailing address, and phone number of your attorney on the authorization. When you or your attorney receives your file, the package will contain a receipt that the rules require you or your attorney to sign and date and return to me.

If you have any questions or prefer to pick up your file, please contact my office at (\*\*\*) \*\*\*-\*\*\*\* between 9:00 a.m. and 4:30 p.m. to make arrangements for you to pick up your file. At the time you pick up your file, bring your driver’s license or other form of identification. When you pick up your file, you will be asked to show identification and sign a receipt.

**If Attorney \*\*\* was performing legal services for you in a representation that was ongoing at the time of his death,** [\*\*\****or*** if attorney is not deceased but disabled, absent or under emergency temporary suspension, then substitute: **If Attorney \*\*\* was performing legal services for you at the time of my appointment as the Conservator,**] **it is important that you retain another lawyer immediately so that, if necessary, your rights may be protected. If you do not retain a new attorney to act on your behalf in a timely manner, you could lose valuable legal rights.**

If you need another attorney but do not know one, there are lawyer referral services that can direct you to an attorney that practices in the pertinent area of law that concerns your specific legal matter. The address and telephone number of the lawyer referral service in our area is as follows:

Lawyer Referral Service

\*\*\* County Bar Association

[Address]

\*\*\*, PA \*\*\*\*\*

(\*\*\*) \*\*\*-\*\*\*\*

Finally, even if Attorney \*\*\* has completed the legal matter with respect to your case file and no longer represents you, you should make every effort to retrieve the file, for it may contain important documents that you may need to preserve. **If I do not hear from you within thirty (30) days from the date of this letter, I will assume that you do not want to retrieve your case file.** Thereafter, I will request that the Court of Common Pleas of \*\*\* County issue an Order that the file be permanently destroyed in a confidential manner in accordance with Rule 322(c)(3) of the Pennsylvania Rules of Disciplinary Enforcement.

I look forward to hearing from you as soon as possible. Thank you in advance for your prompt attention to this important matter.

Very truly yours,

\*\*\*, Esquire

Conservator

\*\*\*/\*\*\*

Enclosure (Authorization form)