

Client Files

Retention and Destruction Rules

Oregon Washington California



OREGON

- **Asserting Liens Against Files**
<http://www.osbar.org/docs/ethics/2005-90.pdf>
<http://www.osbar.org/publications/bulletin/06may/barcounsel.html>
- **Closing Files**
www.osbplf.org, then Practice Aids & Forms, then File Management, then File Closing Checklist
www.osbplf.org, Books from the PLF, *A Guide to Setting Up & Running Your Law Office*
- **Copying Client Files – What is the Client Entitled to and What Can you Charge?**
<http://www.osbar.org/docs/ethics/2005-125.pdf>
<http://www.osbar.org/publications/bulletin/06jan/barcounsel.html>
- **Disengagement Letters**
www.osbplf.org, then Practice Aids and Forms, then Disengagement Letters
- **Disposing of Client Files**
www.osbplf.org, then In *Brief*, then June 2005, then *Document Destruction*
www.osbplf.org, then Practice Aids & Forms, then File Management, then File Retention & Destruction
<http://www.osbar.org/docs/ethics/2005-141.pdf>
- **Electronic Files**
www.osbplf.org, then *In Brief*, then February 2009. *Is it Time to Go Paper-less?*
<https://www.osbar.org/publications/bulletin/09apr/barcounsel.html>
- **Ethics Opinions Home**
<https://www.osbar.org/ethics/ethicsops.html>
- **File Retention Guidelines**
www.osbplf.org, then Practice Aids & Forms, then File Management, then File Retention & Destruction.
www.osbplf.org, Books from the PLF, *A Guide to Setting Up & Running Your Law Office*
- **OSB Bulletin Bar Counsel Ethics Article Archive**
<https://www.osbar.org/ethics/bulletinbarcounsel.html>
- **Wills**
<http://www.leg.state.or.us/ors/112.html>, Disposition of Wills, ORS 112.800 to 112.830



WASHINGTON

- Asserting Liens Against Files
<http://pro.wsba.org/IO/print.aspx?ID=1524>
<http://pro.wsba.org/IO/print.aspx?ID=21>
- Copying Client Files – What is the Client Entitled to and What Can you Charge?
<http://pro.wsba.org/IO/print.aspx?ID=1524>
- Disposing of Client Files
<http://pro.wsba.org/IO/print.aspx?ID=265>
<http://pro.wsba.org/IO/print.aspx?ID=975>
- Electronic Files
<http://pro.wsba.org/IO/print.aspx?ID=1616>
<http://pro.wsba.org/IO/print.aspx?ID=1275>
- Ethics Opinions Home
<http://pro.wsba.org/IO/default.aspx>
- Ethics/Professional Responsibility Program: Ethics Hotline
<http://www.wsba.org/lawyers/ethics/default1.htm>
- Law Office Management Assistance Program
<http://www.wsba.org/lawyers/services/lomap.htm>
- Records Management Guidelines
<http://www.wsba.org/info/recordsmanagement.htm>
- Wills (or Other Original Legal Documents)
<http://pro.wsba.org/IO/print.aspx?ID=338>



CALIFORNIA

- **Ethics Home**
http://www.calbar.ca.gov/state/calbar/calbar_generic.jsp?cid=10128
- **Ethics Hotline**
http://www.calbar.ca.gov/state/calbar/calbar_generic.jsp?cid=10131&id=1118
- **Electronic Files**
<http://calbar.ca.gov/calbar/pdfs/ethics/2007-174.pdf>
- **Disposing of Client Files**
http://www.calbar.ca.gov/calbar/html_unclassified/ca2001-157.html
<http://tinyurl.com/caxbxm> (Additional search results)
- **Will Repositories**
<http://calbar.ca.gov/calbar/pdfs/ethics/2007-173.pdf>

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*These links are a starting point, and do not represent a complete analysis of the topics presented.
Readers should conduct their own appropriate legal research.*