

Roberta Rachel Omin

LCSW

THE RELATIONAL PROFESSIONAL WILL

The Professional Will You Keep *Meaning to Write*

*Why it is so hard to begin, a practice for the parts of you that
hesitate, and a checklist to start your own.*

Roberta Rachel Omin, LCSW

MORE THAN 40 YEARS OF RELATIONAL PRACTICE

A companion to When the Therapist Is Ill, publishing December 2026

Most of us know we need a Professional Will.

Far fewer of us have one.

A Professional Will is a plan of care for our clients, for the day we cannot be there.

The Professional Will is a contingency plan created in the event of a therapist's sudden illness or death. All clinicians are expected to have some kind of plan in place, whether it is called a professional will or an advance directive. Think of it as a personal will for your practice, without the legal formalities.

Despite knowing this is ethically necessary, many therapists don't create this plan; others aren't even aware of it. The NASW Code of Ethics, the Clinical Social Work Board, the American Psychological Association, and the American Psychiatric Association emphasize that planning for practice interruptions and closures is a vital ethical duty to protect patient welfare. The NASW Code, for example, asks us to "make reasonable efforts to ensure continuity of services" when services are interrupted by illness or death.

The reasons we put it off are rarely administrative. They are human. So this guide begins there: with what a Professional Will holds, the four reasons therapists most often avoid writing one, and an inner practice for the parts of you that hesitate. It ends with a starter checklist, so you can begin today.

INSIDE THIS GUIDE

Four steps, taken gently.

1 What a Professional Will holds

The three aspects: your emergency response team, the business, and the logistics.

2 Why we put it off

The four reasons therapists most often avoid it, and what each one protects.

3 An inner practice

A dialogue between your Wise Self and the parts of you that hesitate.

4 Your starter checklist

A checklist under the three aspects, to begin your own.

BEFORE YOU START

Find a quiet place and something to write with. The practice in Part Three asks for a little time, and your answers are worth keeping.

1 What a Professional Will holds

There are three aspects of the Professional Will: your emergency response team, the business, and the logistics. Each one answers a question your colleagues would face if you suddenly could not work.

Emergency Response Team

Who will tell my clients?

A trusted colleague, or a small team of colleagues, who promptly notifies your clients and supervisees. Often called your ERT. While we often think a family member will take on this responsibility, it may not be wise, as they will be in distress themselves and need to attend to personal matters.

Business

What happens to my records and obligations?

Storage of active and inactive client files, based on the laws of your state and profession. Notifying insurance providers, your state licensing board, and the professional organizations you belong to.

Logistics

How will they get in?

Access to your files, phone, and office: the passwords, keys, and locations your team needs to access them.

A PLACE TO BEGIN

Picture a trusted colleague opening your office door tomorrow, without you. What would they need to know and do first?

2 Why we put it off

These are the biggest reasons therapists avoid creating a Professional Will. You may recognize yourself in one of them, or in all four.

i We don't want to face that we may become ill, incapacitated, or die.

It is frightening and overwhelming. This is why most people don't even write a personal will. If you are living with a serious illness, you may have already contended with your eventual mortality. Even so, putting your practice plan in writing can bring it closer again.

ii We don't want to feel how much the therapeutic relationship means.

Writing a Professional Will means feeling how much you matter to your clients, and how much they matter to you. The therapy relationship is one of the most sacred, safest, and life-changing connections for our clients. It has been co-created, and can become a cherished guiding light long after the relationship has ended.

Imagine the relationship ending suddenly, without a goodbye; it is tender ground. It is easy to look away.

 *Planning for an interruption or an ending is another way to honor the relationship.*

iii The details pull us away from the meaning.

Therapists get sidetracked with the administrative details and miss the overall significance and purpose of having a plan in place. We lose sight of the forest for the trees.

The checklist at the end of this guide is here to hold the details, so you can hold the meaning.

iv We believe we have no one to ask to be on our emergency response team.

Many therapists believe they don't have colleagues with whom they can create a Professional Will. Your emergency response team can be one person, or two or more colleagues can also agree to serve as each other's team.

 *One trusted colleague is enough to begin.*

A PLACE TO BEGIN

Which of these four reasons is loudest in you right now? Hold it lightly. You will meet it again in the practice that follows.

3 An inner practice

Let's try an inner practice. It invites your Wise Self, the calm, knowing, and compassionate center in you, into dialogue with the parts of you that resist or hesitate to put your Professional Will into place.

- 1 **Settle.** Make yourself comfortable. Close your eyes and take some deep breaths, turning your gaze inward.
- 2 **Name the parts.** If you put the four reasons above in order of importance, from most important to least, what would your list be? Are there additional concerns beyond these? Reflect on your reasons for not creating your Professional Will.
- 3 **Listen to each part.** Turn toward each hesitant or resistant part, one at a time, and ask: *"What concerns you most about creating a Professional Will?"* From your Wise Self, listen with curiosity and compassion. Be sure you have heard all the parts.
- 4 **Offer help.** Ask each part: *"How could I help you with your concerns?"* Listen to them. Then offer an invitation: *"If I could help you with this, would you be interested?"*
- 5 **Write it down.** Write the dialogue between each hesitant part and your Wise Self. Notice which parts need additional attention. Repeat the invitation and offer of help until your parts are settled and aligned with your Wise Self. Let new answers fill you with confidence to undertake this.
- 6 **Check in.** From your Wise Self, ask your parts: *"Do you feel ready to look at the checklist?"*

💖 *Our Wise Self holds the larger perspective and often has answers that the overwhelmed or fearful parts can't hold.*

IN YOUR OWN WORDS

Write all this down.

Your answers belong to you. Return to them when you write the plan.

The reasons that are true for me, in order:

1

2

3

4

The part of me that hesitates most says:

My Wise Self answers:

How do your parts respond to the invitation of help?

The colleague(s) I could ask, and the one step I will take this week:

4 Your starter checklist

Check off what is done, and return to the rest when you are ready.

Emergency Response Team

Who will tell my clients, and how will they be told?

- ☐ Choose at least one trusted colleague, preferably not a family member, and a backup. Or form a team of colleagues who will handle each other's Professional Wills.
- ☐ Agree on how you will work together and when.
- ☐ Decide how you want to activate the will. Who in your network would notify your ERT?
- ☐ **Tone:** What do you want your clients and supervisees to be told about what happens to you, what specifics, by whom, and in what words? What kind of follow-up would you want in place? Specify responsibilities in relation to clients.
- ☐ Tell your team where your Professional Will and client contact list are kept.

Business

What happens to my records and obligations?

- ☐ Plan how to store active and inactive client files, and for how long, based on the laws of your state and profession.
- ☐ List who must be notified: insurance providers, your state licensing board, and the professional organizations you belong to.
- ☐ Note how billing and outstanding payments should be handled.

YOUR STARTER CHECKLIST, CONTINUED

Logistics

How will they get in?

- ☐ Record where passwords are kept for your records, email, phone, voicemail, and calendar.
- ☐ Note where the keys are: office, file cabinets, and anything locked.
- ☐ Keep a current client contact list where your team can locate it.
- ☐ Give your team a copy of your Professional Will, and tell someone close to you who to contact and how to contact them immediately, if something happened to you.

 *A Professional Will protects the relationship, not only the records.*

This checklist is a starting point, not legal advice. Requirements for record keeping and notification vary by state and profession, so check with your licensing board and professional organization.

A FINAL WORD

Begin with one conversation.

A Professional Will asks us to imagine the day we cannot be there for our clients, and to care for them anyway. The hardest part is rarely the paperwork. It is the first conversation: with the parts of ourselves that hesitate, and with the colleague we ask to stand in for us.

You do not have to do this alone, and you do not have to do it all at once.

My book, [When the Therapist Is Ill: Navigating Vulnerability, Self-Care, and Self-Disclosure in Clinical Practice](#), publishing December 2026, includes what therapists need to know about professional wills and continuity plans, and why so many of us have such a hard time creating them.

[LEARN MORE ABOUT THE BOOK](#)

Workshops on the Relational Professional Will, consultation, and speaking ·

robertaominlcsw.com

Reach Roberta · robertaominlcsw@gmail.com

Roberta

ROBERTA RACHEL OMIN, LCSW