



Session Memory for Claude

Claude forgets between chats; a simple file-based fix

Session Memory for Claude - A Practical Guide

The Problem

Claude doesn't remember anything between conversations. Every new chat starts completely blank. If you spent two hours working through a complex project yesterday, Claude has no idea it happened when you open a new conversation today.

For casual questions, that's fine. For ongoing professional work - client projects, document assembly, case management, recurring workflows - it's a serious limitation. You end up re-explaining context every single time.

The Solution

Maintain a session memory file that Claude reads at the start of each work session and updates at the end. It's a simple text file stored somewhere Claude can access it. Claude reads it, picks up where you left off, and writes back what happened before the conversation ends.

That's the whole concept. The rest is discipline.

What You Need

1. **A place Claude can read and write files.** If you're using Claude with MCP (Model Context Protocol) tools connected to a server, NAS, or cloud storage, Claude can read the file directly. If not, you can paste the contents at the start of each conversation and ask Claude to give you the updated version at the end (copy-paste method).
 2. **A session memory file.** A markdown file that tracks your current state.
 3. **An archive folder.** Because the session file gets overwritten every time, you keep timestamped copies so you can always go back.
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The Session Memory File

Here's a starter template. Adapt it to your practice:

```
# SESSION MEMORY - [YOUR NAME / FIRM NAME]
# Claude: Read this first in every new session.

## Current State
(What's active right now - matters in progress, documents being prepared,
deadlines approaching, tasks waiting on input)

## What Happened Last Session
(Brief summary of what was accomplished - documents drafted, research
completed,
emails sent, decisions made)

## Pending / Next
- [ ] (Next tasks, waiting items, follow-ups)

## Standing Rules
(Firm-specific instructions Claude should always follow:
- Jurisdiction and practice area context
- Formatting preferences
- Confidentiality reminders
- Any "always do this" or "never do that" rules)

## Reference Information
(Key details Claude needs regularly:
- Firm name, address, contact info
- Court filing requirements
- Software and tools you use
- Links to templates or resources)
```

The file grows organically. After a few sessions, it becomes a living document that keeps Claude oriented in your practice.

The Archive Protocol

This is the part people skip and then regret. Session memory files get overwritten - that's how they work. But if Claude (or you) overwrites it with bad data, you've lost your state. The fix is simple:

Before every update: 1. Save a copy of the current file with a timestamp (e.g., `2026-03-28-1115.md`) 2. Make the archive copy read-only if your system supports it 3. Then write the new version

If something goes wrong: You always have the previous version to restore from.

If you're using the copy-paste method (no MCP tools), save timestamped copies in a folder on your computer. Same principle.

Starting a Session

Paste this at the beginning of any work conversation:

Start session: Here is my current session memory. Read it and confirm current state before responding.
[paste contents of your session memory file]

If Claude has direct file access (MCP tools), the prompt is simpler:

Start session: read [path to your session memory file] and confirm current state before responding.

Claude will read it, summarize what it sees, and you're in context.

Make It Faster with a Text Expander

Typing or pasting that prompt every time gets old. Use a text expander so you can type a short trigger and get the full prompt automatically.

Espanso (free, open source, works on Windows/Mac/Linux):

1. Download from espanso.org and install
2. Find or create the config file: - **Windows:** `C:\Users\[YourName]\AppData\Roaming\espanso\match\base.yml` - **Mac:** `~/Library/Application Support/espanso/match/base.yml` - **Linux:** `~/.config/espanso/match/base.yml`
3. Add your triggers:

```
matches:
  - trigger: ";cs"
    replace: "Start session: read [YOUR FILE PATH] and confirm current state before responding."

  - trigger: ";cu"
    replace: "Update session memory with what we did today."
```

Now `;cs` starts a session and `;cu` ends one. Two keystrokes each.

Ending a Session

When you've done significant work, tell Claude:

Update session memory with what we did today.

Claude will produce an updated version of your session memory reflecting what was accomplished, what changed, and what's next. If Claude has file access, it writes directly (after archiving). If not, Claude gives you the text to save.

What counts as "significant work": Anything that changes your state. New documents drafted. Research completed. Decisions made. Tasks finished or added. If the next session would benefit from knowing about it, update the file.

What to Put in Standing Rules

This section is where you make Claude actually useful for your practice instead of generic. Examples:

For a solo estate planning practice:

- Jurisdiction: [Your State]. Always cite state-specific statutes.
- Default document format: [your preference]
- Client communications: Plain English, no legalese unless required
- All estate planning documents must include [your standard provisions]
- Consultation fee: \$[amount]

For a litigation practice:

- Jurisdiction: [Court/District]. Local rules at [link]
- Filing deadlines: Always flag SOL and response deadlines
- Brief format: [your court's requirements]
- Service requirements: [your jurisdiction's rules]

For any practice:

- Never include client names in session memory (confidentiality)
- Use matter numbers instead of client names when tracking work
- Always confirm jurisdiction before providing legal analysis
- Flag conflicts of interest when new matters are discussed

Confidentiality Considerations

Think carefully about what goes in your session memory file. If Claude has access to a server or cloud storage, the file lives there. If you're using copy-paste, it lives on your clipboard temporarily.

Practical guidelines:

- **Use matter numbers or initials instead of full client names** in session memory
- **Don't store sensitive client data** (SSNs, financial accounts, etc.) in the session file - reference where that data lives instead
- **Be aware of your ethical obligations** regarding AI tools and client data in your jurisdiction
- **Review your state bar's guidance** on AI and technology use - many have issued opinions or guidelines
- **Your firm's AI use policy** should address how session data is handled

The session memory should track *your work state*, not serve as a client database.

Scaling: Multiple People, Multiple Roles

If more than one person at your firm uses Claude, give each person their own session memory file. A partner doing M&A work and a paralegal doing document review have completely different contexts - one shared file would be chaos.

Structure it however makes sense:

```
session-memory/  
├─ partner-session-current.md  
├─ associate-session-current.md  
├─ paralegal-session-current.md  
└─ archive/  
    ├─ partner-2026-03-28-1115.md  
    ├─ associate-2026-03-28-0900.md  
    └─ ...
```

Each person starts their session by pointing Claude to their own file. The archive gives everyone an audit trail.

Why This Matters

Three reasons:

1. **Continuity.** You stop re-explaining yourself. Claude picks up where it left off. Your second session on a project is actually a second session, not a restart.

2. **Accountability.** The archive is a timestamped record of what Claude worked on, what decisions were made, and what changed. When something goes wrong - and it will - you can trace back through the history.
 3. **Institutional knowledge.** Over months, your session memory archives become a record of your practice's AI-assisted work. What was built, when, why, and what problems were solved. That has value beyond the immediate task.
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Quick Start Checklist

- ☐ Create a session memory file using the template above
- ☐ Create an archive folder
- ☐ Customize the Standing Rules section for your practice
- ☐ Add your reference information (firm details, jurisdiction, tools)
- ☐ Install a text expander (Espanso recommended) and set up `;cs` and `;cu` triggers
- ☐ Run your first session: paste or point Claude to the file, do some work, update at the end
- ☐ Archive the first version

After that, it's just habit. Start session, do the work, update session memory. Every time.

This system was developed through months of daily AI-assisted legal practice and infrastructure work. It's simple because the problem is simple: Claude forgets. This makes it remember.

About the Author

Patrick Nolan is a solo estate planning attorney at [Nolan Law Firm](#) in Kirksville, Missouri. He is a U.S. Army veteran, former reporter, and the author of *Dead Man's Guide to Estate Planning*. His practice runs on flat fees, aggressive automation, and the belief that a 70% solution shipped today beats a perfect one shipped never.

Find him at [@PatTalksLaw](#) and [nemolegal.com](#).

See our public-facing [AI Use Policy](#).

This guide was written by Patrick Nolan and Claude.