



SOUTHEAST DISTRICT BAR ASSOCIATION
AND LAWYER REFERRAL SERVICE

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Norwalk, CA 90650
Office (562) 868-6787
Fax (562) 864-4713
•www.sedba.org

2011 Application for Membership

I wish to join:
(Select ONE):

Name : _____ Check No. _____

| | | |
|--------------------------|--|---|
| <input type="checkbox"/> | <p>(1) Bar and LRS Standard Membership Membership to the Bar and LRS with 4 LRS panels. <input type="checkbox"/> Additional LRS Panels \$30.00 each</p> | <p>\$270.00 _____ (additional fees)</p> |
| <input type="checkbox"/> | <p>(2) Bar and LRS Sustaining Membership Membership to the Bar and LRS with 4 LRS panels. one meeting ticket for each of six membership meeting for the year plus a listing in SEBAMB as a sustaining member. <input type="checkbox"/> Additional LRS Panels \$30.00 each</p> | <p>\$500.00 _____ (additional fees)</p> |
| <input type="checkbox"/> | <p>(3) Bar and LRS Firm Sustaining Membership Membership to the Bar and LRS for all firm attorneys, two meeting tickets for each of six membership meetings for the year plus a listing in SEBAMB as a sustaining member.</p> | <p>\$1000.00</p> |
| <input type="checkbox"/> | <p>(4) Bar Standard Membership Membership to the Bar Only.</p> | <p>\$125.00 (Government employees \$75.00)</p> |
| <input type="checkbox"/> | <p>(5) Bar Sustaining Membership Membership to the Bar, one meeting ticket for each six membership meetings for the year plus a listing in SEBAMB as a sustaining member.</p> | <p>\$500.00</p> |
| <input type="checkbox"/> | <p>(6) Bar Sustaining Firm Membership Membership to the Bar for all local attorneys in a small firm, two meeting tickets for each of six membership meetings for the year plus a listing in SEBAMB as a sustaining firm member</p> | <p>\$1000.00</p> |
| <input type="checkbox"/> | <p>(7) LRS Only Standard Membership Membership to the LRS only with LRS panels. <input type="checkbox"/> Additional LRS Panels \$30.00 each</p> | <p>\$270.00 _____ (additional fees)</p> |

TOTAL AMOUNT ENCLOSED _____

New members please complete entire form.
 Renewing members please correct any invalid information and complete any missing data.

| | |
|---|--|
| Full Name: | |
| Home Address: | |
| Office Address: | |
| Nearest cross streets: | |
| Office Hours: | |
| Paralegal or Secretary who will make office appointments: | |
| If you have no office staff, would you prefer us to contact you by cell phone for appointments? | |
| Languages spoken: | |
| Office Telephone Number: | |
| Office Fax Number: | |
| Home Telephone Number: | |
| E-mail Address:* | |
| Date of Birth: | |
| Law School Attended: | |
| Graduated (year) | |
| Admitted in California? (date) | |
| State Bar Number | |
| Engaged in law practice since? (date) | |
| To what other Bar Associations do you belong? | |
| Has the State Bar of California ever taken any disciplinary action against you? | <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide detailed information on a separate piece of paper and attach to this application. |

* We will be contacting you predominately through email, therefore be sure to give the email for the person at your office who is in the best position to follow up on referrals and requests.

I hereby authorize the Southeast District Bar Association and the Lawyer Referral Service staff to send any forms, notices, bulletins, announcements, billings, and so on to me via facsimile or email.

Signed: _____ Date: _____

2011 Application for Membership to the LRS

I declare under penalty of perjury that the following is true and correct:

1. I am an active member of the State Bar of California; I am a member in good standing; I maintain a law practice in the Southeast Judicial District as designated in the Rules of Operation.
2. In consideration of the Southeast District Bar Association's maintenance of the Lawyer Referral Service, I agree that the information herein contained may be furnished to both professional and law applicants in the operation of the Lawyer Referral Service. That the name of the undersigned may be classified in the Service as the Board of Trustees of the Association shall direct; that upon five days notice in writing the registration from any and all classifications of the Service now in force and which may be promulgated in the future by the Association.
3. I agree to indemnify and hold harmless the Southeast District Bar Association (and the Lawyer Referral Service and its agents, officers, directors, members and employees and the Committee) from any and all claims, demands, actions, liability or loss, including but not limited to cost of defense including reasonable attorney's fees, which may arise from, or be incurred as a result of all referrals of clients to me through the Lawyer Referral Service out of operation of the Service or the referral of the clients hereunder.
4. I have read, and am familiar with all of the Rules, agree to abide by said rules and such other and further rules as may be hereinafter adopted, and agree to abide by the qualifying procedures as set forth under the rules.
5. I agree to personally conduct the initial consultation with each client referred to any of the Panels of which I am a member (at the appointed time in my office) for up to one-half hour without charges above and beyond the administrative fee charged by the Service, and to establish in advance in writing with the client if compensation is to be sought for (a) consultation beyond the initial one-half hour, or (b) further services.
6. I agree to remit to the Service the \$35 administrative fee within 3 days of initial appointment for each referral that requires the fee, regardless of whether the attorney's fees are later collected from the client. I further agree to remit to the Service 15% of all monies paid by the client. I agree to provided the LRS with a copy of my accounting to client when remitting fees. I also agree to arbitrate any disputes concerning fees owed to the LRS. I agree to remit fees for any and all other referral panels in accordance with the Rules of Operation.
7. In all such matters wherein my compensation is contingent upon a recovery, my total fees will in no event exceed 50% of the total, or gross recovery.
8. I agree to promptly notify the Lawyer Referral Service (herein referred to as "Service") in the event I become ineligible or disqualified to serve on any panel or become unable to accept referrals from the Service.
9. If any member declines the case assigned, he or she shall return that case to the Lawyer Referral Service office.
10. I understand that the staff of the Lawyer Referral Service office, in compliance with Civil Coder #43.95 (a) and (b), shall have the duty to disclose to any client being referred to me the nature of any disciplinary actions which may have been taken against me by the State Bar of California.

I agree to notify the Service immediately of any pending disciplinary proceedings and of any past disciplinary Proceedings closed in a manner adverse to me (including matters closed by private reproof). I agree to notify the Service within ten (10) days of my receipt of any Order to Show Cause from the State Bar of California that disciplinary proceedings have been instituted against me.

I hereby authorize the State Bar of California to release any and all information to the Service regarding any disciplinary proceedings that have been instituted against me.

Read and accepted: _____ Date: _____
(Signature)

11. If any dispute over fees should arise between me and my client referred to me by the Lawyer Referral Service, and the client so requests, such dispute will be submitted to the Lawyer Referral Service Committee of the Southeast District Bar Association for final determination.
12. I agree to be covered by and provide proof of a policy of Professional Liability Insurance or have acquired a bond of self-insurance in the minimum amount of \$100,000 single/\$300,000 aggregate per year. A true copy of the face sheet of said policy or bond is attached hereto. I will notify the Service of any expiration or cancellation of said insurance.
13. I am familiar with the State Bar of California Rules of Professional Conduct and in particular with Rule 6-101, Failing to Act Competently. This rule provides that:

"A member of the State Bar shall not willfully or habitually

- 1) Perform legal services for a client(s) if he/she knows or reasonably should know that he does not possess the learning and skill ordinarily possessed by lawyers in good standing who perform, but do not specialize in, similar services practicing in the same or similar locality and under similar circumstances unless he associates with or, where appropriate, professionally consults another lawyer who he reasonably believes does possess the requisite learning and skill.
2. Fail to use reasonable diligence and his best judgment in the exercise of his skill and in the application of his learning in an effort to accomplish, with reasonable speed, the purpose for which he/she is employed.

The good faith of an attorney is a matter to be considered in determining whether acts done through ignorance or mistake warrant imposition of discipline under rule 6-101."

14. The violation of any of these rules may subject the member to removal from the referral panel.

Executed at _____, California, on _____.

Signed: _____

Print Name : _____

Lawyer Referral Service Panel Listing

There are 19 referral panels. There are categories of cases within each panel. The LRS membership fee entitles you to select a maximum of four (4) panels at no additional cost. You may select any categories within the panels you choose. If you do not select all categories under the panel, it will still count toward your four (4) allotted panel selections. You may select more than four (4) panels. Each additional panel will be \$30.00.

You must satisfy the LRS Panel Requirements in order to receive referrals in the areas of law you select. Please review the requirements prior to selecting your panels and categories.

Please review the panel listings on the following pages and mark the areas that you personally handle and for which you desire to receive referrals.

Panel 1 - Administrative Law

- Educational Law
- Indian/Tribal Law
- Insurance Law
- Licenses - DMV Hearings & Appeals
- Long Term Disability
- Medicare/Medi-cal
- Military Law
- Municipal Law
- Nursing or Vocational Licenses
- Social Security
- Social Security Disability Appeals
- State Disability
- SSI
- Unemployment Insurance Appeals
- Veteran's Benefits
- Welfare Problems

Administrative Law Panel Requirement - 3 MCLE hours within the last two years; 10% of practice in this area and/or representation on 10 cases.

Panel 2 - Bankruptcy

- Chapter 7
- Chapter 11
- Chapter 13

Bankruptcy Law Panel Requirement - 3 MCLE hours within the last two years; 5% of practice in this area or representation on 10 cases.

Panel 3 - Business Law

- Arbitration
- Banking Laws
- Commercial Litigation
- Communications (FCC)
- Contracts
- Corporations
- Entertainment Law
- Franchise Law
- Mediation
- Partnerships
- Pensions & Profit Sharing Plans
- Power of Attorney
- Stocks & Bonds
- Taxation

Business Law Panel Requirement - 6 MCLE hours within the last two years; 10% of practice in this area and representation on 10 cases.

Panel 4 - Collections

- Auto Repossessions
- Collections
- Garnishments

Collections Law Panel Requirement - 2 MCLE hours within the last two years; 5% of practice in this area or representation on 10 cases.

Panel 5 - Consumer Law

- Contracts/Warranties
- Credit Access
- Income Tax Law
- Lemon Law
- Loans/Installments
- Public Utilities
- Unfair Sales Practices

Consumer Law Panel Requirement - 2 MCLE hours within the last two years; 5% of practice in this area or representation on 10 cases.

Panel 6 - Criminal Law

Are you a Certified Specialist? Yes No

- Modest Means Panel *(see attachment)
- Appeals & Writs
- DMV
- DUI
- Expungement
- Misdemeanors
- Traffic Violations
- Felony
 - Murder Cases
 - Death Penalty Cases

Criminal Law Panel Requirement - Murder Cases - Counsel or co-counsel in 1 prior murder trial or prior experience as trial counsel in 2 first-degree felony trials, or prior experience as trial counsel in 10 or more jury trials. Death Penalty Cases - Must meet criteria fro Murder Cases and 5 homicide cases to verdict. Felony - Prior experience as trial counsel in 2 or more trials (1 must be a jury trial). Other areas: 6 MCLE hours within the last two years and representation on 20 cases.

Panel 7 - Discrimination / Civil Rights

- Mental Health
- Other Individual Rights
- Physically Disabled
- Prisoners Rights

Discrimination / Civil Rights Panel Requirements - 6 MCLE hours within the last two years; 10% of practice in this area; directly involved in 10 or more cases through to conclusion or resolution.

Panel 8 - Elder Law

- Elder Abuse
- Medi-cal Planning
- Medi-cal Appeals
- Medicare
- Nursing Home Facilities
- Pension Benefits
- Social Security Supplemental
- Special Needs Trust Accounts

Elder Law Panel Requirement - 6 MCLE hours within the last two years; 10% of practice in this area; directly involved in 10 or more cases, including medicare.

Panel 9 - Environmental Law

- Environmental Law

Environmental Law - (1) Civil or criminal enforcement action by an environmental agency; (2) environmental claims arising under environmental statutes or common law tort law; (3) environmental cost recovery actions; (4) counseling clients on compliance with environmental laws; (5) environmental issues arising in corporate or real estate transactions; (6) teaching, writing or training others in environmental law (200 hours) OR any combination of (1) through (6) and received a minimum of 6 MCLE credits in environmental law in the

Panel 10 - Family Law

Are you a Certified Specialist? Yes No

- Adoptions
- Step Parent Adoptions Only
- Child Custody/Visitation
- Dissolution/Separation/Annulment
- Emancipation
- Grandparent's Visitation Rights
- Mediation/Settlements
- Name Changes
- Paternity
- Prenuptial Agreements
- Property Settlements
- RO/Spousal Abuse
- Child/Spousal Support
- Limited Scope Representation *(see attached)

Family Law Panel Requirement - 6 MCLE hours within the last two years; 10% of practice in this area; representation on 5 dissolution cases to judgment; filed 2 settlement agreements.
Limited Scope Representation - 50% of practice in family law and practicing law for at least 5 years.

Panel 11 - Immigration

- Immigration & Naturalization

Immigration Panel Requirement - 12 MCLE hours within the last two years; 50% of practice in this area; directly involved in 10 cases of business immigration, family immigration and asylum and removal.

Panel 12 - Intellectual Property

- Patents/Copyrights/Trademarks

Intellectual Property Panel Requirement - 10 MCLE hours within the last two years and registered with the U.S. Patent & Trademark Office.

Panel 13 - Juvenile Law

- Abuse/Neglect/Dependency
- Delinquent

Juvenile Law Panel Requirement - 6 MCLE hours within the last two years; 10% of practice in this area; representation on 5 cases.

Panel 14 - Labor Relations

- Employment Harassment
- Employment Discrimination
- Workplace Disputes
- ERISA Law
- Mediation
- Wage Claims
- Wrongful Terminations

Labor Relations Panel Requirement - 6 MCLE hours within the last two years; 15% of practice in labor or employment law; 200 hours of time spent on labor cases in the last two years.

Panel 15 - Miscellaneous

- ABC Liquor
- Admiralty & Boating
- General Civil Matters
- Small Claims Appeals

Miscellaneous Law Panel Requirement - 2 MCLE hours within the last two years; 5% of practice in this area or representation on 5 cases.

Panel 16 - Personal Injury / Tort

- Assault/Battery
- Attorney Malpractice
- Auto Accident - Plaintiff
- Auto Accident - Defendant
- Dental Malpractice
- Dog Bites
- Federal Employers Liability Act
- Identity Theft
- Medical Malpractice
- Miscellaneous Accidents
- Miscellaneous Tort
- Negligence & Emotional Distress
- Police/Prison Brutality
- Product Liability
- Slander/Libel/Harassment
- Slip & Fall
- Victim of Violent Crime
- Wrongful Death

Personal Injury / Tort Panel Requirement - 6 MCLE hours within the last two years; 15% of practice in this area; directly involved in 10 or more cases through to conclusion or resolution in each area marked.

Panel 17 - Probate/Wills/Estates

- Conservatorship
- Contested Probate
- Contested Wills
- Estate Planning
- Guardianship
- Joint Tenancy Termination
- Living Trusts
- Probate
- Wills

Probate / Wills / Estates Law Panel Requirement - 6 MCLE hours within the last two years; 15% of the total number of clients and/or 15% of time spent on probate cases; and/or 20 probate cases.

Panel 18 - Real Estate

- Condemnation
- Foreclosure
- Homeowners Association
- Home Ownership/Real Property
- Leases
- Mediation - Neighbor/Neighbor
- Preparation of Purchase & Sales
- Unlawful Detainers - Landlord
- Unlawful Detainers - Tenant
- Unlawful Detainers - Commercial
- Zoning

Real Estate Law Panel Requirement - 3 MCLE hours in each sub-category, or 3 general real property MCLE hours within the last two years; or representation on at least 4 transactions within each sub area in the last two years; or 25% of practice must be in real estate law.

Panel 19 - Workers' Compensation

- Employer Defense
- Physical Injury
- Stress Related

Workers' Compensation Law Panel Requirement - 6 MCLE hours within the last two years; 10% of practice in each are checked and/or representation on 10 claims cases.

- Please provide a copy of the declaration page of your professional liability insurance unless otherwise stated.
 - SEDBA has current policy which expires on _____

- Please enclose your check made payable to SEDBA.

**Lawyer Referral Service
of the
Southeast District Bar Association**

Limited Scope Representation

We have added a category under the Family Law Panel called Limited Scope Representation. Limited Scope Representation has been going on for years. It is just becoming more formalized as demand increases, especially in the field of family law.

Most limited scope relationships are extremely benign and low risk. They usually consist of "coaching" or advice and counsel, which lawyers do all the time, as well as some ghostwriting and help with pleadings, financial forms, disclosures, orders and the like. This is nothing new and lawyers have been doing it as long as there have been lawyers. Only in a small percentage of cases does the lawyer actually go of record or list his or her name on the pleadings. With the new California Judicial Council forms, the risk of expanded scope or court refusal to allow the attorney to withdraw at the end of the limited scope task has been greatly reduced.

Limited scope representation does not compete with full service. The people who want these services either cannot afford full service, or can afford it but want to retain control over their case. This will not compete with full service panels.

So what exactly is Limited Scope Representation?

Limited Scope Representation, sometimes also called unbundling, means that the client and attorney agree that the attorney will perform some of the tasks associated with the client's case and the client will perform others. For example, the client may agree to gather the financial data while the attorney will draft the paperwork to be filed with the court. The attorney may coach the client on how to prepare documents or review documents the client has drafted. The attorney may coach the client on how to appear in court or may handle only the most complicated parts of the case. The attorney then bills the client only for the parts of the case handled by the attorney.

Benefits of Limited Scope Representation:

For the Attorney:

Provides valuable service to the consumer
"Pay as you go" policy
High % of returning clients
Often becomes a "full service" case
Charge regular hourly rates

For the Client:

"Real" legal assistance & guidance
"Pay as you go" policy, no retainer
You stay in control of *your* case
Collaborative process
Saves money and time

It is not unethical for an attorney to limit his/her professional engagement to consulting, counseling, and guiding of self-representing lay persons in litigation matters, provided that the client is fully informed and expressly consents to the limited scope of representation. *Los Angeles County Bar Association Professional Responsibility And Ethics Committee, Opinion No. 483, Los Angeles Lawyer, (February 1996).*

If a client chooses to appear pro se and there is not a court rule to the contrary, the attorney does not have to disclose the limited scope of representation to the court in which the matter is pending. An attorney may limit the scope of representation of a litigation client as long as the client consents to the limited representation. *Los Angeles County Bar Association Professional Responsibility And Ethics Committee, Opinion No. 502, Los Angeles Lawyer, (November 4, 1999).*

Judicial Council Forms:

FL-950 Notice of Limited Scope Representation

FL-955 Application To Be Relieved As Counsel Upon Completion Of Limited Scope Representation

FL-958 Order On Application To Be Relieved As Counsel Upon Completion Of Limited Scope Representation

FL-956 Objection To Application To Be Relieved As Counsel Upon Completion Of Limited Scope Representation

www.lacba.org This is the Los Angeles County Bar web site. Look for Ethics opinion 502. It is the only California opinion, and was very thoughtfully written by some ethics and malpractice experts.

www.unbundledlaw.org This web site is continually updated with the latest activities and reports from around the country and includes sample retainer agreements and malpractice avoidance tips.

SUMMARY:

If you sign-up for the Limited Scope Representation panel, you will be referred family law clients who need piece-work, respectfully referred to as Limited Scope Representation.

If the referred attorney cannot assist the client, the client must be referred back to the LRS with reasons for refusal.

Administrative Fees

A \$35.00 Administrative fee shall be charged to each client.

Except for:

- Workers' Compensation
- Social Security Appeals
- Modest Means Panel
- Criminal

1. The \$35.00 is for the referral to the attorney through the service.
2. Purpose of fee is to assist in covering the operational expenses of the Lawyer Referral Service (LRS).
3. Each client will be advised of this administrative fee by the LRS when an appointment is made for them with an attorney.
4. Client shall pay the \$35.00 at the time of the appointment prior to the appointment. (Walk-ins to our (LRS office) will pay fee before we schedule appointment with attorney).

- * Form with client's information that is sent via facsimile, should be returned together with the \$35.00 Administrative fee to the LRS within **3 days** of completing the consultation.



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FAX Copy

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To: LRS

- **Attorneys are responsible for collecting and remitting the \$35.00 Administrative fee.**



- if the client does not pay the fee
- if the attorney fails to collect the fee
- if attorney provides a telephone consultation to the client



THE ATTORNEY IS RESPONSIBLE AND AGREES TO PAY THE SERVICE THE ADMINISTRATIVE FEE.

Under no circumstance will the attorney have the authority to waive the administrative fee unless:

- **Prior authorization is given**
- **Due to extreme circumstances**
- **By the LRS Program Manager (Executive Director).**

Consultation Fee

- The attorney shall return to the LRS the \$35.00 Administrative fee within **3 days**, and when applicable 15% of the consultation fee(s).
- Payments may be delayed until the conclusion of the matter on the following types of cases:
 - (A) Workers' Compensation
 - (B) Social Security Appeals
 - (C) All contingent fee matters

Referral Fee

- Attorneys shall be billed monthly, and payment is due the Service within 30 days from the date of the statement.



- Attorneys with accounts payable older than 30 days shall be suspended from all LRS panels until the past due amount is brought current.



LRS Panel Requirement Check List

| | # of MCLE Hours | Percentage of Practice* | # of Hours on Cases (Minimum 200) | # of Cases to Conclusion | Years of Practice in California |
|-------------------------------|-----------------|-------------------------|--------------------------------------|--------------------------|---------------------------------|
| Administrative | | | | | |
| Bankruptcy | | | | | |
| Business Law | | | | | |
| Collections | | | | | |
| Consumer Law | | | | | |
| Criminal Law | | | | | |
| Discrimination / Civil Rights | | | | | |
| Elder Law | | | | | |
| Environmental Law | | | | | |
| Family Law | | | | | |
| Immigration | | | | | |
| Intellectual Property | | | | | |
| Juvenile Law | | | | | |
| Labor Relations | | | | | |
| Miscellaneous | | | | | |
| Personal Injury / Tort | | | | | |
| Probate / Wills / Estates | | | | | |
| Real Estate | | | | | |
| Workers' Compensation | | | | | |

*Total not to exceed 100%