

**San Diego County Bar Association  
Lawyer Referral and Information Service  
MODEST MEANS PROGRAM**

ATTORNEY APPLICATION FOR PANEL APPOINTMENT AS A

\_\_\_\_\_ Service Attorney      \_\_\_\_\_ Mentor Attorney

FOR OFFICE USE ONLY			
State Bar Date _____	State Bar # _____	Record of Discipline	___ YES ___ NO
SDCBA Member ___ YES ___ NO		Insurance Expiration _____	

**INSTRUCTIONS:** Review the Rules of Operation of the Modest Means Program, fill out this form completely, and return the completed form with a copy of the cover page of your professional liability insurance policy to the San Diego County Bar Association Lawyer Referral and Information Services ("LRIS") at 1333 Seventh Avenue, San Diego, California 92101. Non-SDCBA members must submit membership fees in the amount of \$300 payable to "LRIS".

Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
(Last)                      (First)                      (Middle)

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

Firm Name: \_\_\_\_\_ Office Hours: \_\_\_\_\_

Office Address: \_\_\_\_\_

Admitted to California Bar (Mo/Yr) : \_\_\_\_\_ State Bar Number: \_\_\_\_\_

Foreign Language (s) Spoken FLUENTLY: \_\_\_\_\_

Current LRIS Family Law Panel member? \_\_\_\_\_ Certified Family Law Specialist? \_\_\_\_\_

Current VLP Participant? \_\_\_\_\_ Liability Insurance Carrier: \_\_\_\_\_

Policy Limits: \_\_\_\_\_ Expiration Date: \_\_\_\_\_ (attach cover page)

Engaged in active law practice since: \_\_\_\_\_

(Note: All Lawyer Referral Services in California are required to inform clients referred of the nature of any disciplinary actions(s) taken against an attorney. Civil Code §43.95; Revenue and Taxation Code § 23734 (d). Moreover, the LRIS must determine the disciplinary status of all panel members and must disclose to the client the nature of any disciplinary action taken against the panel attorney and when the disciplinary action occurred. There is no prospective time limit on the duty to disclose disciplinary actions.)

Have you ever been disciplined in this or any other jurisdiction by a state or federal licensing agency?  
\_\_\_\_\_ Yes      \_\_\_\_\_ No (check one).

If your answer is yes to have ever been disciplined, by separate attachment fully disclose the nature of each disciplinary action taken, the name and location of the licensing agency involved, relevant date (s), and the final disposition thereof.

**CERTIFICATION:** I have read and am familiar with the Rules of Operation of the LRIS Modest Means Program (“Rules”) and certify that I am qualified for appointment to the Family Law panel under the Rules. I declare under penalty of perjury that the following is true and correct:

1. I am an active member in good standing of the State Bar of California.
2. I agree to be bound by all the Rules Governing the Modest Means Program, together with such other or additional rules as may hereafter be adopted by the LRIS.
3. I embrace the goals stated in the Rules, and agree to provide legal services at substantially reduced rates consistent with the financial ability of the clients referred. I understand that fees for services provided by Mentor Attorneys, if charged, may not be passed on the client unless the client agrees in advance and in writing to assume responsibility therefor.
4. If applying for appointment as a Service Attorney, I agree to:
  - a. Enter into a written fee agreement with the client;
  - b. Personally handle the client’s matter;
  - c. Not charge for the first half hour consultation (even if retained);
  - d. Consult with a Mentor Attorney available to me through the Modest Means Program, and to comply with State of California Professional Rule of Conduct 3-110 regarding competence;
  - e. Notify the Modest Means Program administrator if I am unable to obtain adequate support from any Mentor Attorney assigned to me so that another Mentor Attorney can be assigned;
  - f. Satisfy a minimum education requirement through attendance at an orientation workshop/ substantive law seminar sponsored by LRIS (or an LRIS approved organization) or demonstration of equivalent alternative experience or education. If the latter, attach a detailed summary of your family law related education, training and/or experience. (Certified Family Law Specialists or current members of the LRIS Family Law Panel need not attend the seminar or attach supplement information.)
5. If applying for appointment as a Mentor Attorney, I certify that:
  - a. I am either a Certified Family Law Specialist or a current member of the LRIS Family Law Panel;

- b. I understand that I will not be entering into an attorney-client relationship with the Service Attorneys' clients, but will nonetheless be directly contributing to the provision and improvement of legal services in San Diego County;
  - c. I will maintain communication with and be reasonable available to those Service Attorneys that are assigned to me and provide consultation, advice, and review of the practice and relationship with the assigned Modest Means Program clients as requested or desired by such Services Attorneys;
  - d. I will retain the client confidences revealed to me by the Service Attorney in connection with such consultations.
  - d. I will report to the Service Attorney and to the Modest Means Program administrator any difficulties of which I am aware in either the services being rendered to the client, the relationship between the Services Attorney and myself, or my ability to continue as a Mentor Attorney; and
  - f. I will maintain my competency in the area of Family Law at a level qualifying me for placement on the LRIS Family Law Panel.
6. I agree to promptly notify the Modest Means Program administrator in the event that I become ineligible, disqualified or otherwise unable to serve on this panel or to accept referrals.
  7. I agree to waive all claims I may have against and indemnify and hold harmless the San Diego County Bar Association, the LRIS, and its officers, directors, committee members and employees against and from any and all claims, losses and liability (including attorneys' fees) arising out of the operation of the Modest Means Program, the LRIS, or arising from any referral made by or through the Modest Means Program.
  8. I agree to acquire and maintain professional liability insurance in the amounts of \$100,000 per claim and \$300,000 per policy year, or such other amounts as may be set by the LRIS Permanent Committee, and to provide annually proof of the existence of such coverage. I understand I can receive no referrals until proof of malpractice insurance has been received by the LRIS.
  9. I agree to submit any fee dispute with a Modest Means Client (if the client agrees) to binding arbitration by the San Diego County Bar Association's Fee Arbitration Committee.
  10. I agree to notify the Modest Means Program administrator, as promptly as is reasonably practicable, of any disciplinary action taken against me in the future while I am a Modest Means Program panel member.

Date: \_\_\_\_\_

\_\_\_\_\_  
Signature of the Attorney Applicant

Revised (9/06)  
Modestmeans\_applic