



ATTORNEY-PARTICIPANT APPLICATION

COVERING PARTICIPATION BEGINNING JULY 1, 2015 AND CONTINUING
TO INCLUDE ALL SUBSEQUENT APPLICATION AND RENEWAL PERIODS
UNLESS AND UNTIL MODIFIED BY AGREEMENT OF THE PARTIES

Introduction

The Cleveland Metropolitan Bar Association Lawyer Referral Service (CMBA LRS) “operates in the public interest for the purpose of referring prospective clients to lawyers, pro bono and public service programs, and government, consumer, or other agencies who can provide the assistance the clients need in light of their financial circumstance, spoken language, and disability, geographical convenience, and the nature and complexity of their problem.” CMBA LRS is an Ohio Supreme Court-registered and ABA-approved Lawyer Referral and Information Service.

CMBA LRS is open to all lawyers licensed and duly-admitted to the practice of law in Ohio:

- a) who maintain an office or other physical presence in Northeast Ohio;
- b) who meet the “reasonable, objectively-determined experience requirements established by the service.” Gov. Bar. R. XVI;
- c) who apply to LRS, gain approval, and execute a CMBA LRS Participation Agreement;
and
- d) who pay the annual LRS Participation Fee (\$250, unless pro-rated or discounted)

These requirements and other CMBA LRS policies are set and modified from time-to-time by an appointed LRS Oversight Committee. Such Committee has established procedures for admitting, suspending, and/or removing Attorney-Participants from its roll of panelists and for the normal daily operations of CMBA LRS. Its determinations can be appealed to the CMBA Board of Trustees.

CMBA LRS makes referrals (subject to screening and other limitations) *free of charge*, and the initial phone call to the Attorney-Participant is offered as a *free initial consultation* (“up to one-half hour, at the Attorney-Participant’s discretion”). In this way, providing uncompensated brief phone consultations as a public service is inherently part of the LRS experience. See CMBA LRS Participation Agreement.

Neither party to the referral is obligated to enter into any Lawyer-Client relationship, but a portion of any legal fees generated from a referred matter are to be paid over to CMBA LRS in accordance with the terms and conditions stated more fully in the LRS Participation Agreement. This amount is interchangeably referred to as the CMBA LRS “Percentage” or “Co-counsel” Fee.

CMBA LRS may not control or place limits on an Attorney-Participant’s selection of co-counsel in any referred matter, but “Percentage” Fees payable to CMBA LRS are to be calculated as a percentage of the *total*/net fees earned in connection with the matter (i.e. not limited to the fee earned by the Attorney-Participant to whom the matter is referred). Attorney-Participants should be sure to explain this provision to selected Co-Counsel. It is the obligation of the LRS Attorney-Participant to calculate and pay “Percentage” Fees in accordance with the terms and conditions stated more fully in the LRS Participation Agreement.

In the CMBA LRS Participation Agreement, LRS Attorney-Participants acknowledge that matters referred by LRS are not to be re-referred to partners, affiliated counsel, or any other lawyer who is not also an LRS Attorney-Participant without Co-Counseling the matter, notifying CMBA LRS of the arrangement, and ensuring that the proper “Percentage” Fee is paid over to CMBA LRS.

In the CMBA LRS Participation Agreement, LRS Attorney-Participants agree not to charge referred clients fees or other costs that would exceed those the client would have incurred had LRS been involved in making the referral. In other words, An LRS Attorney-Participant may not increase or inflate a client’s fees to offset or cover LRS Participation or “Percentage” Fees.

In the CMBA LRS Participation Agreement, CMBA LRS reserves the right to periodically survey referred persons to determine satisfaction with its operations, inquire about fees, and to investigate and take appropriate action with respect to client complaints against Attorney-participants.

In the CMBA LRS Participation Agreement, CMBA LRS also reserves the right to periodically audit Attorney-Participants' referral records to ensure compliance with the terms and conditions of the CMBA LRS Participation Agreement with respect, but not limited to, the calculation and payment of "Percentage" Fees.

To apply, an Attorney must complete the following Application questionnaire. Where responding to a prompt would violate client confidentiality, redaction is appropriate.

Attorney will be timely notified of acceptance (or conditional acceptance, or rejection) of Attorney's Application for LRS participation.

In the case of approval, LRS participation will commence upon CMBA's receipt of payment of all applicable application fees and an executed LRS Participation Agreement (including proof of Professional Liability Insurance coverage) and shall continue thereafter until expiration of the term or until terminated as provided for in the LRS Participation Agreement.

Re-application to CMBA LRS is not required on an annual basis. Once approved to participate, an Attorney-Participant remains qualified to participate and receive referrals in the areas of law in which the Attorney-Participant has demonstrated sufficient experience in their original Application. Wherever an Attorney-Participant wishes to *add* areas of experience for referral purposes, CMBA LRS shall require application in order for the Attorney-Participant to receive referrals in any such *new* areas of law.

As indicated in the CMBA Participation Agreement, an Attorney-Participant agrees to continue to be bound by the terms of that Agreement for the entire duration of their participation in CMBA LRS. Any amendment to such Agreement must be ratified by both parties by the execution of a new Agreement.

Application

Mail completed application to: CMBA LRS1375 East 9th Street, Floor 2, Cleveland, OH 44114-178

Last Name: _____

First Name: _____ M.I.: _____

Firm: _____

Address _____

City/State _____

Zip Code _____

Phone _____

Fax _____

E-Mail _____

OH Atty. Reg. # _____

Yr. Admitted (OH) _____

[Please check all that apply / answer the following:]

Attorney is a member in good standing of the bar of the State of Ohio

Attorney maintains a physical office in Cuyahoga or a contiguous county

Attorney has, and will maintain in effect, professional liability insurance having limits not less than \$100,000 per occurrence/\$300,000 in the aggregate and provided by an insurer qualified to do business in the State of Ohio

Professional Liability Insurer _____

Policy limits _____

Expiration Date of Policy: _____

Please attach a copy of your current Insurance "Declarations Page" to this Application

Attorney is admitted to the practice of law in States *other than Ohio*

If so, please indicate jurisdiction(s) and year(s) of admission

Attorney is a member of CMBA (or wishes to join in order to take advantage of the Member-discounted LRS Participation Fee)

Years engaged in the practice of law _____

Notable Admissions (Courts) _____

Normal Office Hours _____

Are you aware of any unresolved grievances/disciplinary complaints filed against you?

NO YES

If yes, please explain (including investigating entity)

Have you ever been the subject of professional discipline in any jurisdiction?

NO YES

If yes, please explain (including investigating entity and description of findings)

Are you proficient in any (foreign) language(s)?

NO YES

If yes, please indicate the following

Language

_____ Speak Read Translate
_____ Speak Read Translate

Are you now-willing to serve as a Mentor for an attorney in an area(s) of practice for which you will be accepting referrals? NO YES Maybe

[Panel Selection]

Areas of Law in which referrals are desired (check all boxes for areas applied to):

*Note: For each type of matter selected, an Applicant must attach a listing and description of at least three (3) such matters handled to a substantial degree or completion in the preceding five (5) years **or submit a signed affidavit stating that the Applicant possesses experience exceeding this requirement.**

*Where applicable, an Applicant should describe the nature of their participation in the representation, facts, issues, amounts in controversy, final results, and how the client benefitted from the Applicant's counsel or representation.

*Where an Applicant has taken recent CLE courses in a relevant area of law, Applicant should indicate these, along with any other relevant information (including certification in this area), background, training, or experience in the relevant area of law.

1001 Admiralty Law	<input type="checkbox"/>
1101 Bankruptcy (Debtors)	<input type="checkbox"/>
1201 Business / Commercial Disputes	<input type="checkbox"/>
1202 Business / Commercial Disputes – Appeals	<input type="checkbox"/>
1203 Business – Entity Formation / Dissolution	<input type="checkbox"/>
1204 Business – International	<input type="checkbox"/>
1301 Civil Rights – Discrimination (Non-Employment)	<input type="checkbox"/>
1302 Civil Rights – Harassment (Non-Employment)	<input type="checkbox"/>
1303 Civil Rights – Prisoner Rights & Police Misconduct	<input type="checkbox"/>
1304 Civil Rights – 1 st Amendment Rights	<input type="checkbox"/>
1305 Civil Rights – ADA	<input type="checkbox"/>
1401 Collections (Judgment-Creditors Only)	<input type="checkbox"/>
1501 Consumer Law – Construction Disputes	<input type="checkbox"/>
1502 Consumer Law – Debt Collection DEFENSE	<input type="checkbox"/>
1503 Consumer Law – Insurance Coverage & Bad Faith	<input type="checkbox"/>
1504 Consumer Law – Lemon Law & Used Vehicle Warranties	<input type="checkbox"/>
1505 Consumer Law – General Litigation & Appeals	<input type="checkbox"/>
1506 Consumer Law – Bank Dispute / Financing / Predatory Lending	<input type="checkbox"/>

1601	Criminal Defense – Appeals	<input type="checkbox"/>
1602	Criminal Defense – Common Pleas Court	<input type="checkbox"/>
1603	Criminal Defense – Federal Court	<input type="checkbox"/>
1604	Criminal Defense – Juvenile Court	<input type="checkbox"/>
1605	Criminal Defense – Opposing Protection Orders	<input type="checkbox"/>
1606	Criminal Defense – Traffic, OVI & Municipal Court	<input type="checkbox"/>
1607	Criminal Defense – Record Seals	<input type="checkbox"/>

1701	Employment Law – Pension Issues	<input type="checkbox"/>
1702	Employment Law – Unemployment Compensation	<input type="checkbox"/>
1703	Employment Law – Wage and Hour Violations	<input type="checkbox"/>
1704	Employment Law – Harassment / Discrimination / Wrongful Termination	<input type="checkbox"/>
1705	Employment Law – Education (Faculty / Staff)	<input type="checkbox"/>
1706	Employment Law – Federal Courts	<input type="checkbox"/>
1707	Employment Law – General Inquiries	<input type="checkbox"/>
1708	Employment Law – Employer (Defendant)	<input type="checkbox"/>
1709	Employment Law – ADA	<input type="checkbox"/>

1801	Family Law – Adoptions	<input type="checkbox"/>
1802	Family Law – Child Custody / Visitation	<input type="checkbox"/>
1803	Family Law – Child Support	<input type="checkbox"/>
1804	Family Law – Divorce / Dissolution / Legal Separation	<input type="checkbox"/>
1805	Family Law – Grandparents’ Visitation	<input type="checkbox"/>
1806	Family Law – Paternity	<input type="checkbox"/>
1807	Family Law – Post-Decree Domestic Relations	<input type="checkbox"/>
1808	Family Law – QDROs	<input type="checkbox"/>
1809	Family Law – Abuse / Neglect Allegations	<input type="checkbox"/>
1810	Family Law – International	<input type="checkbox"/>
1811	Family Law – Seeking Protection / Restraining Order	<input type="checkbox"/>

1901	Immigration	<input type="checkbox"/>
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2001	Intellectual Property (Trademarks, Copyrights, Patents)	<input type="checkbox"/>
2002	Intellectual Property Litigation & Appeals	<input type="checkbox"/>

2101	Personal Property Disputes (Non-Real Estate)	<input type="checkbox"/>
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2201	Probate – Administration of Estates	<input type="checkbox"/>
2202	Probate – Estate Planning (Wills, Trusts, Medicare / Medicaid)	<input type="checkbox"/>
2203	Probate – Guardianships and Powers of Attorney	<input type="checkbox"/>
2204	Probate – Recovery of Embezzled Assets & Will Contests	<input type="checkbox"/>
2205	Probate – Appeals	<input type="checkbox"/>

2301	Real Estate – Boundary Disputes & Easements	<input type="checkbox"/>
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2302	Real Estate – Evictions (Landlord is Client)	<input type="checkbox"/>
2303	Real Estate – Evictions (Tenant is Client)	<input type="checkbox"/>
2304	Real Estate – Foreclosure Defense	<input type="checkbox"/>
2305	Real Estate – General Litigation & Appeals	<input type="checkbox"/>
2306	Real Estate – Mineral Rights (Oil & Gas)	<input type="checkbox"/>
2307	Real Estate – Purchase / Sale / Deed Transfers	<input type="checkbox"/>
2308	Real Estate – Zoning, Building Code Violations	<input type="checkbox"/>
2309	Real Estate – Condo Law	<input type="checkbox"/>
2310	Real Estate – Liens / Title Defects	<input type="checkbox"/>

2401	Professional Licensure & Disciplinary Issues	<input type="checkbox"/>
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2501	Social Security (Disability)	<input type="checkbox"/>
2502	Social Security (Income)	<input type="checkbox"/>
2503	Social Security (Retirement)	<input type="checkbox"/>

2601	Tax – Income Taxes (Federal, State, Local)	<input type="checkbox"/>
2602	Tax – Real Estate (Property) Taxes	<input type="checkbox"/>

2701	Tort – Asbestos / Mesothelioma (Plaintiff)	<input type="checkbox"/>
2702	Tort – Civil Theft (Plaintiff)	<input type="checkbox"/>
2703	Tort – Defendant	<input type="checkbox"/>
2704	Tort – Defamation & Privacy Issues (Plaintiff)	<input type="checkbox"/>
2705	Tort – Dental Malpractice (Plaintiff)	<input type="checkbox"/>
2706	Tort – Funeral Home Liability (Plaintiff)	<input type="checkbox"/>
2707	Tort – Legal Malpractice (Plaintiff)	<input type="checkbox"/>
2708	Tort – Malicious Prosecution / Wrongful Imprisonment (Plaintiff)	<input type="checkbox"/>
2709	Tort – Medical Malpractice (Plaintiff)	<input type="checkbox"/>
2710	Tort – Nursing Home Liability (Plaintiff)	<input type="checkbox"/>
2711	Tort – Personal Injury (Plaintiff)	<input type="checkbox"/>
2712	Tort – Professional Negligence (Plaintiff)	<input type="checkbox"/>
2713	Tort – Property Damage (Plaintiff)	<input type="checkbox"/>
2714	Tort – Slip & Fall (Plaintiff)	<input type="checkbox"/>
2715	Tort – Wrongful Death (Plaintiff)	<input type="checkbox"/>
2716	Tort – Appeal	<input type="checkbox"/>
2717	Tort – Dog Bite (Plaintiff)	<input type="checkbox"/>
2718	Tort – Products Liability (Plaintiff)	<input type="checkbox"/>
2719	Tort – Assault / Battery (Plaintiff)	<input type="checkbox"/>
2720	Tort – Legal Malpractice (Defendant)	<input type="checkbox"/>
2721	Tort – Uninsured / Under-Insured Motorist	<input type="checkbox"/>

2801	Veterans’ Benefits (VA)	<input type="checkbox"/>
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2901	Victims of Crime Compensation	<input type="checkbox"/>
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3001	Workers' Compensation (Ohio)	<input type="checkbox"/>
3002	Workers' Compensation (Federal Claim)	<input type="checkbox"/>
3101	Environmental Law	<input type="checkbox"/>
3201	Liquor Licensing	<input type="checkbox"/>

Being an applicant to CMBA LRS, Attorney hereby affirms that the representations contained throughout this CMBA LRS Application (and any attachments hereto) are true and correct to the best of Attorney's knowledge and belief.

Name _____

Signature _____ Date _____