



## San Mateo County Bar Association

333 Bradford Street, Suite 150

Redwood City, CA 94063

Phone 650.298.4017

Fax 650.368.3892

[www.smcba.org](http://www.smcba.org)

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### Lawyer Referral Service Program Enrollment Requirements

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**Goal:** The goals of the Lawyer Referral Service (LRS) Program are to serve the public with a referral to a lawyer who is able to render and is interested in rendering needed legal services for particular legal problems, provide information about lawyers and the availability of legal services, inform the public when and where to seek legal services, and provide legal services at an affordable cost to the public.

**Eligibility:** Lawyers who satisfy the following requirements are eligible to apply for participation in the LRS Program. The lawyer must be active and in good standing with the State Bar of California, and provide proof of Error and Omissions Insurance. As well as:

- a. Pursuant to Rule 4.2.2 of the Lawyer Referral Service, all members must "maintain a law office within the geographical service area defined as all of the County of San Mateo and the County of Santa Clara." If you have listed an office that is not within the geographical service area as your main office, please describe the arrangements you have made to have an available office in the geographical service area, in which you can meet with clients and indicate your commitment to so meet.
- b. Pursuant to Rule 4.2.3 of the Lawyer Referral Service, all members must "certify that at least 25% of professional time and practice is devoted to and in the geographical service area." If your primary office is not within the geographical service area or the majority of cases/matters you have identified on subject panel application(s) are not venued in the County of San Mateo and the County of Santa Clara, please explain the basis for your belief that at least 25% of professional time and practice is devoted to and in the geographical service area.

As you fill out the Application for LRS Enrollment, please note that all lawyers participating in the LRS Program agree to abide by the *Rules for Lawyer Referral Service*. For more information on application requirements and eligibility, please read the ***Rules for Lawyer Referral Service*** located on our website at [www.smcba.org](http://www.smcba.org). You may also call the LRS Coordinator at 650.298.4017 or email [LRSAttorney@smcba.org](mailto:LRSAttorney@smcba.org) to request a copy.



**San Mateo County Bar Association**  
333 Bradford Street, Suite 150  
Redwood City, CA 94063  
Phone 650.298.4030 Fax 650.368.3892  
[www.smcba.org](http://www.smcba.org)

## Application for LRS Membership

**All applicants must complete and return all pages of this Application, payment, and:**

- Subject Practice "Specialty" Panel applications, as required, if not already on file. See below for more information.
- A copy of the Declarations page of your Errors & Omissions policy showing current coverage, if not on file.
- The executed LRS Membership Agreement (last page of this application).

### Section I. Attorney Information – Please print clearly.

\_\_\_\_\_  
First Middle Initial Last

**Choose One:**

- I already participate on the SMCBA LRS and wish to change my panel participation.
- I do not yet participate on the SMCBA LRS, but I am *already* a member of the SMCBA, **or** I am submitting a New Member Application with this LRS Application.
- I am **not** a member of the SMCBA and do not wish to join.

California State Bar No: \_\_\_\_\_ Month/Year Admitted: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Address: \_\_\_\_\_  
Street City State Zip

Office Phone: \_\_\_\_\_ Office Fax: \_\_\_\_\_

Email address: \_\_\_\_\_ Website: \_\_\_\_\_

Law School: \_\_\_\_\_ Month and Year Graduated: \_\_\_\_\_

### Section II. LRS Membership

My office has the following access for persons with disabilities (i.e., wheelchair ramp, elevator, etc.):

#### Members of the San Mateo County Bar Association

SMCBA members pay a flat fee of \$65.00, which includes:

- *Unlimited* Modest Means Panels and Limited Scope Panels
  - Subject Practice "Specialty" Panels are \$10 each
  - General Practice Panels are \$10 each

#### Non-Members of the San Mateo County Bar Association

LRS Membership Dues for Non-SMCBA members consist of three components:

- (1) a membership fee based on the year admitted to the California State Bar Association
  - Admitted to the California State Bar 10 years or more: \$300
  - Admitted to the California State Bar less than 10 years: \$200
  -

## Application for LRS Membership

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 First                      Middle Initial                      Last

**Subject Practice "Specialty" Panels.** To select Specialty Panels, check the appropriate boxes within the Specialty.

- Each Subject Practice "Specialty" Panel is **\$10.00**.
- **Each Subject Practice "Specialty" Panel requires** a separate **experience application**, which can be found on the SMCBA Website at: <http://www.smcba.org/for-legal-professionals/lawyer-referral-service>

Subject Practice "Specialty" Panel Name
<p><b>Bankruptcy</b></p> <p><input type="checkbox"/> Chapter 7</p> <p style="padding-left: 20px;"><input type="checkbox"/> Business</p> <p style="padding-left: 20px;"><input type="checkbox"/> Consumer</p> <p><input type="checkbox"/> Chapter 13</p> <p><input type="checkbox"/> Chapter 11</p> <p style="padding-left: 20px;"><input type="checkbox"/> Creditors      <input type="checkbox"/> Litigation</p>
<p><b>Business</b></p> <p><input type="checkbox"/> Non-Profit</p> <p><input type="checkbox"/> Contracts</p> <p><input type="checkbox"/> Formation/ Governance/Dissolution</p> <p><input type="checkbox"/> Stocks, Securities, Investments</p> <p><input type="checkbox"/> Business Tort</p> <p><input type="checkbox"/> Breach of Contract/Warranty</p>
<p><b>Criminal Law</b></p> <p><input type="checkbox"/> Appeals</p> <p><input type="checkbox"/> Elder Abuse</p> <p><input type="checkbox"/> Felonies</p> <p><input type="checkbox"/> Misdemeanors</p> <p><input type="checkbox"/> Sexual Assault-Minor</p> <p><input type="checkbox"/> Sexual Assault-Adult</p> <p><input type="checkbox"/> Record Expungement</p> <p> </p> <p><input type="checkbox"/> Juvenile      <input type="checkbox"/> Dependency</p>

Subject Practice "Specialty" Panel Name
<p><b>Estate Planning/Probate</b></p> <p><input type="checkbox"/> Estates</p> <p><input type="checkbox"/> Conservatorship</p> <p><input type="checkbox"/> Elder Law</p> <p><input type="checkbox"/> Guardianship</p> <p><input type="checkbox"/> LPS Conservatorship</p> <p><input type="checkbox"/> Probate Litigation</p> <p><input type="checkbox"/> Wills</p> <p><input type="checkbox"/> Trusts</p>
<p><b>Elder Dependent Adult Protection Team (EDAPT):</b></p> <p>Are you willing to accept referrals of financial elder abuse on a contingency basis? <input type="checkbox"/> YES <input type="checkbox"/> NO    If so, please submit the EDAPT supplemental application.</p>
<p><b>Family Law</b></p> <p><input type="checkbox"/> Dissolution</p> <p style="padding-left: 20px;"><input type="checkbox"/> with Custody</p> <p><input type="checkbox"/> Paternity</p> <p><input type="checkbox"/> Annulments</p> <p><input type="checkbox"/> Pre &amp; Post Nuptial Agreements</p> <p><input type="checkbox"/> TRO's</p> <p><input type="checkbox"/> Adoptions</p>

**Return completed forms to:**

LRS - San Mateo County Bar Association  
 333 Bradford Street, Suite 150  
 Redwood City, CA 94063

## Application for LRS Membership

\_\_\_\_\_  
 First                      Middle Initial                      Last

**Subject Practice "Specialty" Panels.** To select Specialty Panels, check the appropriate boxes within the Specialty.

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- **Each Subject Practice "Specialty" Panel requires** a separate **experience application**, which can be found on the SMCBA Website at: <http://www.smcba.org/for-legal-professionals/lawyer-referral-service>

Subject Practice "Specialty" Panel Name
<p><b>General Litigation</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Breach of Contract/Warranty/Construction Defect</li> <li><input type="checkbox"/> Civil Rights Violations</li> <li><input type="checkbox"/> Defamation/ Libel/ Fraud</li> <li><input type="checkbox"/> Legal Malpractice/Professional Negligence</li> <li><input type="checkbox"/> Other Non-PI/PD/WD tort</li> <li><input type="checkbox"/> Insurance Coverage                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Auto    <input type="checkbox"/> Home Owners    <input type="checkbox"/> Medical</li> </ul> </li> </ul>
<p><b>Immigration Law</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Amnesty/Asylum</li> <li><input type="checkbox"/> Visa Issues</li> <li><input type="checkbox"/> Citizenship Status</li> <li><input type="checkbox"/> Deportation</li> <li><input type="checkbox"/> Other</li> </ul>
<p><b>Intellectual Property</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Copyrights, Licensing, Infringement</li> <li><input type="checkbox"/> Computer Law, Proprietary Rights</li> <li><input type="checkbox"/> Trade Secrets/Know How</li> <li><input type="checkbox"/> Intellectual Property</li> </ul>

Subject Practice "Specialty" Panel Name
<p><b>Miscellaneous</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Administrative Law</li> <li><input type="checkbox"/> Social Security                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Benefits    <input type="checkbox"/> Disability    <input type="checkbox"/> Medi-Care</li> </ul> </li> <li><input type="checkbox"/> Unemployment</li> <li><input type="checkbox"/> Civil Appeals</li> <li><input type="checkbox"/> Environmental Law</li> <li><input type="checkbox"/> Municipal Law                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Code    <input type="checkbox"/> Land Use/Zoning    <input type="checkbox"/> Water Rights</li> </ul> </li> <li><input type="checkbox"/> Workers Compensation</li> <li><input type="checkbox"/> Education                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Expulsions    <input type="checkbox"/> Suspension    <input type="checkbox"/> Other</li> </ul> </li> <li><input type="checkbox"/> Labor/ Employment                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Employees (including wrongful term.)</li> <li><input type="checkbox"/> Employer</li> <li><input type="checkbox"/> Union</li> </ul> </li> </ul>
<p><b>Personal Injury</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Auto    <input type="checkbox"/> Other PI/PD/WD                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Plaintiff    <input type="checkbox"/> Defendant</li> </ul> </li> <li><input type="checkbox"/> Uninsured Motorist</li> <li><input type="checkbox"/> Product Liability</li> <li><input type="checkbox"/> Malpractice                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Dental    <input type="checkbox"/> Medical</li> </ul> </li> </ul>
<p><b>Real Estate</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Purchase/Sale                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Contracts    <input type="checkbox"/> Litigation</li> </ul> </li> <li><input type="checkbox"/> Mortgage Lending Disputes</li> <li><input type="checkbox"/> Condominium Law</li> <li><input type="checkbox"/> Construction Litigation</li> <li><input type="checkbox"/> Ownership/Easement Disputes</li> <li><input type="checkbox"/> Other Real Property</li> </ul>
<p><b>Taxation</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Personal</li> <li><input type="checkbox"/> Business</li> <li><input type="checkbox"/> Procedures/Audits/Litigation</li> </ul>

## Application for LRS Membership

First \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last \_\_\_\_\_

**General Practice Panels. To select General Practice Panels, check the appropriate boxes.**

- Each General Practice Panel is **\$10.00**.
- **No** experience application is required.

General Practice Panel
<input type="checkbox"/> Civil Harassment (harassment, stalking, sexual assault)
Civil - Limited Jurisdiction (Under \$25k demand) <input type="checkbox"/> Auto <input type="checkbox"/> Other PI/PD/WD <input type="checkbox"/> Other Non-PI/PD/WD <input type="checkbox"/> Plaintiff <input type="checkbox"/> Defendant
Collections <input type="checkbox"/> Plaintiff <input type="checkbox"/> Defendant
Consumer Rights <input type="checkbox"/> Credit <input type="checkbox"/> Fraud <input type="checkbox"/> Lemon Law <input type="checkbox"/> Identity Theft
<input type="checkbox"/> DMV Matters <input type="checkbox"/> Traffic Infractions

General Practice Panel
<input type="checkbox"/> Military Law
<input type="checkbox"/> Name Changes
<input type="checkbox"/> Commercial Lease <input type="checkbox"/> Residential Lease <input type="checkbox"/> Landlord <input type="checkbox"/> Tenant
<input type="checkbox"/> Unlawful Detainer <input type="checkbox"/> Residential <input type="checkbox"/> Commercial <input type="checkbox"/> Landlord <input type="checkbox"/> Tenant
<input type="checkbox"/> Small Claims Appeals

**Modest Means Panels.** To select Modest Means Panels, check the appropriate boxes. All Modest Means Panel costs are included in the \$65 fee.

- Attorneys' **fees** for Modest Means cases **are to be set in accordance with Rule 12 of the SMCBA's Lawyer Referral Rules**, available on the SMCBA website at: <http://www.smcba.org/for-legal-professionals/lawyer-referral-service>
- Each Modest Means Panel **requires an experience application**, available for download at SMCBA website: <http://www.smcba.org/for-legal-professionals/lawyer-referral-service>
- You **must** indicate the **number of Modest means referrals** you will accept during the dues year.

Modest Means Panel Name	Panel Application	Number of Cases	Modest Means Panel Name	Panel Application	Number of Cases
<b>Criminal Law</b> <input type="checkbox"/> Appeals <input type="checkbox"/> Felonies <input type="checkbox"/> Misdemeanors <input type="checkbox"/> Sexual Assault-Adult <input type="checkbox"/> Sexual Assault-Minor	Criminal	_____	<b>Family Law</b> <input type="checkbox"/> Disso w/custody issues <input type="checkbox"/> Disso w/o custody issues <input type="checkbox"/> Annulments <input type="checkbox"/> Pre Nuptial Agreements <input type="checkbox"/> TRO's <input type="checkbox"/> Adoptions	Family Law	_____
<b>Criminal Law</b> <input type="checkbox"/> Juvenile <input type="checkbox"/> Dependency	Criminal Juvenile	_____	<b>Estate Planning/ Probate</b> <input type="checkbox"/> I will prepare No Cost Wills for Senior Citizens	Probate	_____
<b>Real Estate</b> <input type="checkbox"/> Unlawful Detainer – Residential (Tenant) <input type="checkbox"/> Residential Lease - Tenant	Real Estate	_____	<b>Bankruptcy</b> <input type="checkbox"/> Ch. 7, Consumer <input type="checkbox"/> Ch. 13	Bankruptcy	_____

**Pro Bono :** Are you willing to accept referrals of clients for representation on a pro bono basis? If so, please state what areas (e.g. DV, UD, conservatorships): \_\_\_\_\_

**Limited-Scope:** Are you willing to accept referrals of family law cases on an unbundled/limited representation basis?  
 YES    NO   If so, please submit the Family Law Limited-Scope supplemental application.

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\_\_\_\_\_  
 First Middle Initial Last

### LRS Payment Calculation

<b>Choose One:</b>	<b>Fees</b>	<b>Amount Enclosed</b>
<input type="checkbox"/> I am a member of the SMCBA	\$65	\$ _____
<input type="checkbox"/> I am not a member of the SMCBA and was admitted to the California State Bar 10 years or more (\$250 + \$50)	\$300	\$ _____
<input type="checkbox"/> I am not a member of the SMCBA and was admitted to the California State Bar less than 10 years (\$150 + \$50)	\$200	\$ _____
<input type="checkbox"/> I selected Subject Practice "Specialty" Panel(s). Enter number Subject Practice "Specialty" panels =====→	____ Subject Practice "Specialty" Panels x \$10/each	\$ _____
<input type="checkbox"/> I selected General Practice Panel(s). Enter number of General Practice panels =====→	____ General Practice Panels x \$10/each	\$ _____

**Total Due** \$ \_\_\_\_\_

### Payment Options

I am paying by the enclosed check, payable to the San Mateo County Bar Association.

I am paying by credit card and authorize the SMCBA to charge my account \$ \_\_\_\_\_

VISA     MasterCard    Account Number: \_\_\_\_\_

Expiration Date: \_\_\_\_/\_\_\_\_/\_\_\_\_    Name on Card: (Please print clearly): \_\_\_\_\_

Credit Card Verification Number (*Italicized* number on signature line on reverse of card. For your protection, we cannot process payment without this number): \_\_\_\_\_

Billing Address for this card: Street: \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Authorized Signature: \_\_\_\_\_ Today's Date: \_\_\_\_\_

## Application for LRS Membership

I \_\_\_\_\_ declare that:  
(Please print your name)

1. I am an active member of the State Bar of California, and I maintain a law office within the geographical service area defined as all of the County of San Mateo and the County of Santa Clara where I can meet with potential clients.
2. **At least 25% of my professional time and practice is devoted to and in the geographical service area.**  
Please see the requirements page for additional certification requirements.
3. I agree to render services in: \_\_\_\_\_ (A) San Mateo County \_\_\_\_\_ (B) Santa Clara County.
4. I have read and understand the rules governing LRS and agree to abide by them and such other and future rules as may be adopted by the Board of Directors of the San Mateo County Bar Association ("SMCBA").
5. I am presently covered by Errors and Omissions Insurance in an amount not less than \$100,000 for each occurrence and \$300,000 in aggregate per year and shall maintain said policy or a renewal policy throughout the dues period. Should the policy expire or be canceled for any reason, I agree to notify the Lawyer Referral Service of the SMCBA prior to the expiration or cancellation date and shall refuse any further referrals from LRS after the expiration or cancellation date until the policy has been renewed or reinstated.
6. I agree that fees charged to the clients referred by LRS shall be no more than those charged to clients not referred by LRS for similar service and agree to submit to binding arbitration any fee dispute initiated by any client referred to me by LRS.
7. I agree to promptly return confirmation reports and referral progress and remittal reports and forward to LRS any and all consultation fees received from referred clients and to promptly respond to case disposition slips and forward to LRS 15% of any attorney's fees earned from referred clients above \$100.
8. I hereby declare that I either have sufficient experience and skill necessary to undertake representation of clients referred by LRS, or that I will perform the duties necessary to competently represent clients in those areas by associating or, where appropriate, professionally consulting with another member of the Bar who is competent in such fields, or by acquiring sufficient learning and skill before actual performance in such areas is required. I further declare that I have sufficient time, resources, and abilities to perform such duties, and that in such areas where I lack sufficient expertise at the time of undertaking to represent a client in such a matter, I will not charge the client for my efforts in obtaining sufficient expertise to undertake such representation competently.
9. If I am a member of a specialty subject panel, I recertify my application for said panel and additionally affirm that I have maintained my expertise in said area of law by handling of additional cases and/or by continuing education.
10. I am competent to render legal services or have a qualified interpreter readily available in the following language(s) other than English:  
(A) \_\_\_\_\_ (B) \_\_\_\_\_ (C) \_\_\_\_\_.
11. Declaration pursuant to Civil Code Section 43.95 (check all that apply):  
 I am **not currently** under discipline by the State Bar of California or any other state licensing agency.  
 I have **never been** disciplined by the State Bar of California or any other state licensing agency.  
 I **have been** disciplined by the State Bar of California or any other state licensing agency on the following dates and for the following reasons (attach separate sheet if necessary):  
\_\_\_\_\_
12. I agree to cooperate with the LRS in adhering to all established guidelines stipulated above (initial). \_\_\_\_\_
13. I understand that any disciplinary action ever taken against me by the State Bar of California shall, and by any other state licensing agency, may be disclosed to every client referred to me by LRS, and that this will be done pursuant to Civil Code Section 43.95.
14. I agree to waive and release any and all claims against The San Mateo County Bar Association, its members and employees, The Committee(s), and its agents, for any liability or loss arising out of the activities or the operation of The Lawyer Referral Service or the referral of clients and agree to indemnify and hold harmless the Bar Association, its employees, The Committee, and its agents, from any and all claims, demands, actions, liability or loss, which may arise from or be incurred as a result of, any and all referrals of clients to any LRS panel attorney through The Service.

I declare under penalty of perjury under the laws of the State of California that the information contained on the LRS Membership Agreement, and this Declaration per Civil Code Section 43.95 are true and correct.

Executed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ at, \_\_\_\_\_, California.

Printed Name: \_\_\_\_\_ Signature: \_\_\_\_\_