

Bar Association of



Montgomery County, MD

Bar Association of Montgomery County, Maryland  
Lawyer Referral Service  
27 W Jefferson Street  
Rockville, MD 20850  
Phone: 301-279-9100  
LRS2@barmont.org

Lawyer Referral Service

# Panel Member Application

2017

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2017 Application

Dear New or Returning Panelist:

Please find enclosed your 2017 BAMC Lawyer Referral Service (LRS) application and invoice. To begin or renew, complete the following steps:

1. Review and complete pages five (5) through ten (10)
2. Complete the Panel Card indicating the areas of law in which you would like to receive referrals. You must meet LRS criteria for all practice areas. See page seven (7) for more details.
3. Mail your completed application, along with your annual membership fee of **\$250.00** to:  
**BAMC LRS, 27 W. Jefferson Street, Rockville, MD 20850**

Our Client administrative fee is **\$50**. The member attorney shall make a good faith effort to collect this fee at the time of the discussion/consultation as agreed to in the "Policies and Procedures for Panel Attorneys" section of this document. Clients seeking a telephonic discussion/consultation are required to submit payment in advance to BAMC. Your referral confirmation will so note this payment, when applicable. You must return \$30 of the administrative fee, if collected, along with the BAMC Referral Record Form, to BAMC within two (2) weeks of referral issuance regardless of whether contact with the client was established. If you cannot accept the referral, you must refer the client back to the LRS.

Please do not hesitate to contact us directly with questions, comments, or concerns.

Sincerely,  
Maria Delgado | mdelgado@barmont.org  
LRS Coordinator

## **LAWYER REFERRAL AND INFORMATION SERVICE MEMBERSHIP**

### **ABOUT**

The **Lawyer Referral Service (LRS)** is a client-facing, referral-driven public service of the **Bar Association of Montgomery County, MD (BAMC)**. LRS panel attorneys (Panelists) benefit from the practice-building and positive public relations elements of LRS membership. Inbound Client call volume is in a growth period—creating increased opportunities to generate more traffic into your firm.

### **FUNCTION**

An in-house BAMC LRS Coordinator speaks with the Client about his or her legal issue. Once an area of law is identified, the Coordinator refers the Client to the appropriate Panelist for a thirty-minute discussion/consultation that provides the client with needed traction on a legal problem. Often, the Client requires additional services and will chose to retain the LRS Panelist. In this way, LRS Panelists are **providing a meaningful public service while building their brands.**

### **COST**

- LRS attorney membership is **\$250 per fiscal year** for BAMC members. The annual fee for non-BAMC members is \$400.
- As a fee-based service, the **Clients are required to submit an administrative fee of \$50** to Panelist on the day of the discussion/consultation. Counsel remits \$30 of this sum to the BAMC. Additionally, if an LRS-referred client is retained by the Panelist and the fees collected total \$400 or more, the Panelist must remit to the LRS a referral fee of ten percent of fees collected over \$400.. All proceeds generated by LRS are cycled back into the service for marketing, staffing, and technological improvements (see page five [5] for more details).
- For Reduced Fee and Gray Panel, the administrative fee submitted to the Panelist by the client is \$25. Counsel remits \$15 of this sum to the BAMC. No percentage fee is owed.
- The LRS waives the \$50 Client fee in Social Security/Disability and Worker's Compensation matters.

### **CRITERIA**

To join the LRS, an attorney **must**:

- Maintain a minimum of \$100,000 in malpractice insurance.
- Have handled a minimum of two (2) cases to conclusion or with a mentor, **or** completed three (3) hours of Continuing Legal Education within the last eighteen (18) months for each practice for which the attorney wishes to receive referrals.
- Bar Association of Montgomery County, MD membership is **not** a requirement for joining the LRS.

## OUR PROCESS

### **Client Calls the Service**

Once the Client's legal issue and geographic location are determined, the LRS Coordinator will call an appropriate Panelist to coordinate an appointment. If the Coordinator is unable to reach the Panelist, the client is given the name and telephone number of the appropriate Panelist. A confirmation e-mail will also be sent to the panelist. The Client is advised to identify himself/herself as being referred by the LRS, and is told that the \$50 LRS administrative fee will be payable at the time of the visit to the Panelist for a thirty-minute consultation.

### **Referral is Transmitted:**

This BAMC LRS office completes a Referral Record Form, a copy of which is e-mailed as a .pdf attachment to the referred Panelist. The receiving Panelist should return the completed form within fifteen (15) business days of receipt, irrespective of Client contact. If a conflict of any kind precludes the Panelist from completing a discussion/consultation with a Client, the Panelist must refer the Client back to the LRS.

### **\$50 Administrative Fee is Collected:**

The \$50 administrative fee must be collected by the Panelist at the time of the Client's meeting, unless the matter is Social Security/Disability or Workers' Compensation case. The Panelist will be billed by the LRS for \$30 of that fee. (Reduced Fee administrative fee is \$25) If the client is out of state and the consultation is to take place telephonically, the LRS office will collect the fee from the client and reimburse the Panelist for their portion of the consultation fee.

### **Referral Fee:**

In the event the Panelist retains a Client referred by the LRS, you are required to remit a referral fee of ten percent of the fees collected in excess of \$400 to the Bar Association of Montgomery County. (Reduced Fee, Simple Will Program and Gray Panel cases are excluded from this fee) **FLAT FEES FOR FULL REPRESENTATION OR LIMITED SCOPE REPRESENTATION** - In the event the Panelist is retained by a Client referred through the LRS, and the Client and Panelist agree on a Flat Fee for either full representation or limited scope representation, the panelist must remit a referral fee of ten percent of the Flat Fee collected in excess of \$400 to the Bar Association of Montgomery County. If the Panelist and Client agree on Flat-Fee representation, the ten percent referral fee for Flat Fees collected in excess of \$400 will apply even if the Client qualifies for the Reduced Fee or Gray Panel cases.

### **Please Remember:**

Panelists risk losing membership privileges by failing to comply with these LRS rules.

## 2017 LRS MEMBERSHIP APPLICATION

### General Information

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

Firm Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Year admitted to Maryland Bar: \_\_\_\_\_

Other states in which you are licensed to practice law: \_\_\_\_\_

Are you fluent in a second language to the extent that you may provide services to a client in that language? If so, please list the applicable languages:

\_\_\_\_\_

### Professional Liability Insurance Information

Professional Liability Insurance Company: \_\_\_\_\_

Amount of Coverage: \_\_\_\_\_ Policy #: \_\_\_\_\_

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

# 2017 Individual Lawyer Referral Practice Area

Please place a check mark indicating the areas of law you would prefer to receive referrals:

**ADM. & AGENCY LAW**

- Federal
- State & Local

**BANKRUPTCY**

- Individual
- Corporate

**BUSINESS LAW**

- Corporate
- Small Business
- Non Profit

**COLLECTIONS**

- Plaintiff
- Defendant

**COMPUTER LAW**

- Internet
- Other \_\_\_\_\_

**CONSUMER**

- Credit

**CONTRACTS**

- Commercial
- Personal
- Government

**CRIMINAL**

- Felony
- Misdemeanor
- Federal

**EDUCATION LAW**

- Special Ed
- Gen. Issues

**ELDER LAW**

- Nursing Home
- Other Issues

**ENVIRONMENTAL**

**ESTATES, TRUSTS & WILLS**

- Probate
- Estate planning
- Will contests

**DISCRIMINATION**

- Employment
- Other \_\_\_\_\_

**FAMILY LAW**

- Adoption
- Child Support
- Guardianship
- Custody
- Contested Divorce
- Domestic Violence
- Pre-nuptial agreements
- Name Changes

**HEALTH LAW**

**IMMIGRATION & NATURALIZATION**

**INSURANCE**

- Disputed Claims
- Medical
- Disability
- Automobile
- Life

**JUVENILE LAW**

- Delinquency
- Non-Delinquency

**INTERNATIONAL LAW**

**LABOR RELATIONS**

- County
- State
- Federal
- Private Industry (Employer Employee\_\_\_)

**LANDLORD/TENANT**

- Landlord
- Tenant

**LIBEL/SLANDER**

**MALPRACTICE**

- Legal
- Medical
- Dental

**MEDIATION**

- Specific
- General

**MILITARY LAW**

**NEGLIGENCE/PI**

- Plaintiff
- Defendant
- Contingency/Plaintiff

**PATENTS**

**TRADEMARKS**

**COPYRIGHTS**

**PENSION**

- Government
- Private

**PERSONAL INJURY**

- Tort
- Car Accident

**REAL ESTATE**

- Conduct Settlement
- Boundary Dispute
- Foreclosure
- Zoning & Condemnation
- Co-op/ Condos

**SOCIAL SECURITY**

- Disability
- Other

**TAXATION**

**TRAFFIC**

- DWI
- DUI

**UNEMPLOYMENT**

- State
- Federal

**VETERANS ISSUES**

- Appeals
- Disability Benefits

**WORKERS' COMPENSATION**

- State
- Federal
- Other

**OTHER**

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## POLICIES AND PROCEDURES FOR PANEL ATTORNEYS

Please initial the below numbered items to signify your understanding and consent.

1. The Panel Attorney must meet the experience requirements as specified in the Maryland Rules of Professional Conduct, must have handled a minimum of two (2) cases to conclusion, or, in the alternative, completed three (3) hours of Continuing Legal Education within the last eighteen (18) months for each Practice area from which the Panelist wishes to receive referrals. Panelists shall not accept a case for which they are unqualified. If you receive a referral for which you are not qualified, you are responsible for informing the LRS. \_\_\_\_\_
2. The Panel Attorney must have no pending criminal charges involving moral turpitude. \_\_\_\_\_
3. Each Panel Attorney agrees to binding arbitration by a neutral party regarding any dispute concerning LRS rules or fees due LRS arising from a referral. \_\_\_\_\_
4. The Client referred by the BAMC **must** be seen by the Panelist to whom the Client was referred for the Client's thirty-minute discussion/consultation. **No other** staff member, attorney, or agent of the Panelist is permitted to conduct the discussion/consultation. Failure to abide by this rule may result in dismissal from the LRS. \_\_\_\_\_
5. The Panel Attorney is responsible for collecting the \$50 administrative fee from the Client and forwarding \$30 of it to the LRS. \_\_\_\_\_
6. The Panel Attorney will remit to the BAMC a referral fee of ten (10) percent of fees paid and collected on LRS cases that generate fees in excess of \$400. The Panel Attorney further agrees not to increase his or her fees to compensate for the ten (10) percent referral fee he or she must remit to the BAMC. \_\_\_\_\_
7. The Panel Attorney is responsible for accurately completing and returning the referral form to the LRS within fourteen (14) days of referral receipt. The form may be e-mailed to LRS2@barmont.org, mailed to **BAMC LRS, 27 W. Jefferson Street, Rockville, MD 20850**, or faxed to **(301) 217-9327**. \_\_\_\_\_
8. Each Panel Attorney must maintain professional liability insurance of no less than \$100,000 at all times. Any changes in policy number or amount of insurance must be immediately reported to the LRS. \_\_\_\_\_
9. LRS Clients may be randomly surveyed to ascertain their satisfaction or dissatisfaction with our services and the service of our Panel Attorneys. \_\_\_\_\_
10. Each Panel Attorney is responsible for notifying LRS of any changes in address, phone, or fax information. \_\_\_\_\_
11. Each Panel Attorney is responsible for notifying LRS of any changes concerning the areas of law in which he or she will accept referrals. \_\_\_\_\_
12. Violation of LRS rules and procedures may be brought to the attention of the LRS Committee and the Executive Committee of the BAMC and could result in your suspension from the Lawyer Referral Service Panel. \_\_\_\_\_

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13. Each Panel Attorney must comply with these policies and procedures, as well as with any and all requests or policies of the Executive Director of the Bar Association, the LRS Committee, and the Executive Committee of the BAMC. Failure to comply with the LRS rules and procedures may result in suspension of panel membership. \_\_\_\_\_

14. The LRS is a service to the community and a major source of public relations for the BAMC. Therefore, whenever possible, please accommodate any reasonable requests for information. Above all, please be courteous to all referrals. \_\_\_\_\_

15. The LRS reserves the right to contact referred clients to evaluate client satisfaction and panel member adherence to LRS policies. If a referred client contacts the LRS and expresses a complaint regarding the attorney, the client will be provided the LRS Complaint Form. If the form is returned to LRS, the attorney may be temporarily suspended from the LRS rotation until the complaint is reviewed and resolved by the LRS Committee and/or Committee Chair. The Committee and/or Committee Chair will review issues that involve LRS policies. The Committee and/or Committee Chair may refer the client to the Maryland Attorney Grievance Committee or another appropriate forum for resolution. \_\_\_\_\_

#### POLICIES AND PROCEDURES AGREEMENT

I HAVE READ AND AGREE TO THE LAWYER REFERRAL POLICIES AND PROCEDURES AS ABOVE STATED.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_

\_\_\_\_\_  
Printed Name of Panel Attorney

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Signature of Panel Attorney



### REDUCED FEE PARTICIPATION

This service continues to be an integral part of the LRS. Clients are informed that the hourly rate out-of-court is \$100 and in-court is \$120. The client income guidelines to qualify for Reduced Fee are included in this packet. Please refer to the APPLICATION FOR REDUCED FEE SERVICES form we have included for your use, which the client must agree to execute. Whether or not you accept a client on a Reduced Fee basis, is your decision.

I will accept Clients from LRS who request Reduced Fee consideration.

Yes \_\_\_\_\_

No \_\_\_\_\_

### GRAY PANEL PARTICIPATION

This service is designed to supplement Pro Bono and Reduced Fee programs. Gray Panel attorneys participate on a voluntary basis and agree to represent qualified Montgomery County Residents at a fee reduced by a minimum of 33 1/3% of their regular rates. Contingent fee cases or cases in which the lawyer's fee is established by the Court or by statute will not be handled on a Gray Panel basis. A condition of receiving Gray Panel referrals is that the attorney disclose in writing within 14 days the fee established in the case.

Failure to follow Gray Panel guidelines would, after a review by the LRS Committee, result in either removal from rotation or from Gray Panel participation. As in Reduced Fee procedure, acceptance of a Gray Panel referral will not remove the lawyer from rotation. Possible Gray Panel cases will be identified and so recommended to the attorney by the LRS staff; however, the ultimate decision to accept or reject a client on a Gray Panel basis will remain with the Lawyer.

I wish to sit on the Grey Panel Reduced Fee Panel.

Yes \_\_\_\_\_

No \_\_\_\_\_

### SIMPLE Will PROGRAM

The attorney agrees to prepare a simple Will for \$150, if the income is between \$30,369 & \$32,369

I wish to participate in the Simple Will Program

Yes \_\_\_\_\_

No \_\_\_\_\_

**Pro Bono/Low Fee/Self-Represented Litigant Project  
ATTORNEY PARTICIPATION CERTIFICATION**

This service is designed to supplement Pro Bono and Reduced Fee programs offered by the Bar Association of Montgomery County. PB/LF/SERL attorneys participate on a voluntary basis and agree to represent qualified Montgomery County residents in Family Law cases. The attorney will spend, at a minimum, one morning per month at the Montgomery County Circuit Court LRS office, meeting with unrepresented litigants following the Family Law scheduling hearings. After meeting with a litigant, the attorney may offer to represent the litigant for a regular or low-bono fee (depending on the unrepresented litigant's income) or refer the litigant to the appropriate legal services provider. Lawyers intending to limit the scope of their representation pursuant to the recently-adopted amendments to Rule 1.2 of the Rules of Professional Conduct may only do so when reasonable under the circumstances and in compliance with the protocol rules established for this program and all applicable rules and court orders regarding limited representation.

To qualify for the program, the attorney must:

- 1) have taken the Rita Rosenkrantz Family Law Training CLE within last three years;
- 2) have seven (7) years of Family Law experience with a substantial majority of his/her practice committed to Family Law; or
- 3) be willing to work closely with an approved mentor attorney until one of above criteria can be met.

I wish to volunteer in the PB/LF/SERL Project and agree to provisions provided herein.

Yes \_\_\_\_\_ No \_\_\_\_\_

I certify that I meet Qualification No. 1 or No. 2 (circle one) above, or will comply with Qualification No. 3 until such time as I meet Qualification No. 1 or No. 2 above. I certify that if I intend to limit the scope of my representation pursuant to the recently-adopted amendments to Rule 1.2 of the Rules of Professional Conduct, I will only do so when reasonable under the circumstances and in compliance with the protocol rules established for this program and all applicable rules and court orders regarding limited representation.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name (Print)

## MASTER AGREEMENT

I certify that I will abide by the referral procedures above-established by the Bar Association of Montgomery County, MD Lawyer Referral Service Committee and that I will:

1. **PERSONALLY** consult with persons referred by the LRS for a period of at least 30 minutes for a referral fee not to exceed \$50.00 and to collect and forward \$30 of the fee to the LRS. Unless waived in advance by the LRS staff, I agree to collect from each Client **the sum of \$50 and promptly return \$30 of said amount to the LRS with the appropriate Referral Record Form.**

2. **REMIT** to the BAMC a referral fee of ten (10) percent of fees on LRS-referred matters on which I generate fees in excess of \$400.

3. **PROVIDE** LRS a copy of the accounting to the client when remitting the percentage referral fee. I understand that the surcharge fee applies to the total contingent fee received by me, my partners and/or associates resulting from the subject matter of the original referral.

4. **ABIDE** by the policies and procedures as set forth in the application.

I hereby certify that I am in the active legal practice and not currently subject to any proceedings under Subtitle B.V. of the Maryland Rules of Procedure. I am duly admitted to practice before the Court of Appeals of Maryland and presently a member in good standing, and I will immediately notify the Service if I am suspended or disbarred from the practice of law in Maryland. I understand that the Service will attempt to refer me only persons who indicate a problem in one of the fields I have indicated on the application, but that LRS is able to do only limited screening before a referral is made.

\_\_\_\_\_  
Signature of Attorney

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print name