Firm Background and Structure

PLEG 104

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Bryant & Stratton College

PLEG 104 Portfolio Project

**Part 1- Firm Background and Structure**

1. Name and type of law firm: Oklahoma Divorce and Child Custody Law Firm, LLPs
2. Internal Firm Organization: The business structure of the firm; This Firms practice includes primarily civil litigation and some criminal litigation.  An example of s the types of cases that are considered and accepted for civil litigation are those cases that involve the family (divorce, custody, modification, contempt, collection of child support, and paternity.)  On some occasions- wrongful tracking of you via an Electronic Tracking Device will occur which will result in filing of a Victim Protective Order.  My office also accepts a limited number of cases from parties seeking an Expungement and Sealing of civil and criminal records. By limiting my practice for maximum effectiveness, this Law Office offers our clients the personal attention and case management that are key to bringing any case to a conclusion.  I have remained a service-oriented lawyer to each client who have been from all sections of the United States and internationally.

**Part 2- Internal Firm Organization**

1. Equity Partners: Mark Zinger, Partner and Oliver Christian – Managing Partner: Sitting on the top of the law hierarchy, these senior partners are the founding lawyers of the firm. The Managing Partner oversees the day to day operations of the firm and often head an executive committee comprised of other senior partners. They also establish and guide the firms’ vision. Managing partners focus on the staff efforts to serving clients, implement strategies and human resource management. In addition, communicating and establishing the firms’ values, policies, and procedures including orientation, training and coaching. Overall the Managing Partner monitors the firm’s organization, finances, and team to ensure growth and client satisfaction.
2. None Equity Partner- Purmonie Chateram; is a salaried partner who has been promoted from associate to tier of partnership but do not have ownership stake in the firm and do not share profits. As a senior attorney the equity partner duties are the same as the managing partner just on salary and with limited access to projects that may generate revenue and have limited voting rights in law firm matters.
3. Associate Attorney’s- Danille Watts, ESQ, Junior Associate, Jamila Stokes, ESQ, Senior Associate, D’Mya Walker, ESQ; Junior Associate- Duties are to handle case that are presented to us. Our Associate Attorney’s is assigned a paralegal or legal secretary who will assist them while working on new and existing client files/cases.
4. Legal Administrator- Jenae Smith; none attorney whose responsibilities are to manage the activity of the administrative assistant, legal secretaries, and paralegals. It is a requirement that a legal administrator is knowledgeable when it comes to accounting, trade, and may be certified or familiar with book-keeping. Having knowledge of federal payroll and tax codes is also a requirement in addition to financial management of budget and books.
5. Law Office Manager or Legal Manager- Wynn Canton; duties are to hire attorneys, paralegals, and other law firm staff. They also pair lawyers with paralegals. Writing memorandums, proposals, work policy and job descriptions also falls under the duties of the legal manager.
6. Other Managers- Kim Moyer, Legal Manager, Brandon Paisley, Law Office Manager and Annie Flowers, Assistant Law Office Manager. They assist or fill in for the Office Manager when possible. The duties and requirements are the same as the Office Manager/Legal Manager
7. Paralegals- Clarissa Smith and Molly Brothers, Assist attorneys’ in the delivery of legal services. Assist with intakes and interviews, litigation, legal research, case preparation, draft legal documents, and memorandums.
8. Law Clerk- Mark Zinger; Aid in courtroom proceedings, perform legal research, prepare affidavits, legal complaints, communicate with counsel regarding case management and procedural requirements, take sworn statements from witnesses and etcetera.
9. Legal Secretaries- Shawna John and Laura Smith; perform the daily functions required for the efficient operation of a legal office which goes beyond filing, typing, dictation, and phone answering. Legal Secretaries or Assistants possess specialized skills unique to the legal profession.
10. Legal Receptionist- Tara Handley; work at the front desk located in the lobby or waiting area. Legal Receptionist are required to greet guest professionally, articulately, and politely, answer incoming calls and route them, maintain and schedule conference rooms, maintain waiting area, order supplies, collect, route and distribute mail, do light filing, photocopying, faxing, and data entry. Additionally, they are to possess excellent interpersonal and customer service skills.
11. Other Law Personnel- Stephanie Bryce, Alexis Dunbar; IT Technicians Keep all software, malware and VPN up to date, as well as. Troubleshoot any IT problems.
12. Cary Butler, Maintenance
13. Galen Younger and Amanda Kemp- Legal Investigators

**Part 3- File Handling Procedures**

The firms internal process for handling a case begins with the interview/consultation with the client.

As the client enters the firms lobby, they are greeted by the legal receptionist or legal assistant. Their appointment would then be verified and asked to have a seat and complete a contact form while they wait for the attorney they are assigned to or their paralegal comes to get them. The receptionist would call the associate or attorney and let them know their client has arrived for their consultation. The paralegal assigned to assist would provide the attorney with the interview questions or rubric to be used to gather the necessary information from the potential client. When ready, the paralegal retrieves the client from the waiting area and introduction is then exchanged. The assisting paralegal would assist with taking notes from the beginning of the consultation until the end. This way the associate/attorney can compare notes with the paralegal if there was anything missed. After the initial interview any questions, concerns, and misunderstanding would then be addressed. The procedure would all be physically done, once the data gathered has been assessed for accuracy the paralegal would then have it typed up and saved in the case management software once we decide to go ahead with the case. Strategizing and care planning on how to move forward would be the responsibility of the legal secretary who will then analyze the information and share with the legal investigator so that evidence can be gathered to support the clients claim. Any information or evidence gathered would be given to the legal secretary who would draft a report of the investigator’s findings and present to the associate/attorney assigned. The attorney would review these findings and would meet with non-equity counselor or of counsel to discuss next steps. Once they agree that enough evidence has been gathered the attorney would begin to draft up documents to begin legal proceedings. The paralegal would do any research needed to gather information such as laws or prior judgements needed to support the client’s case. Once the draft is completed the paralegal sends it to the legal secretary for review and revision if necessary; the final draft is then sent to the associate/attorney assigned for final review and approval. The legal administrator would oversee this process as they work to keep confidential information sealed as they build the clients file using the case management software which would allow each person working on the case access.

Timekeeping is the responsibility of each staff member who is working on the case. Recording this time is pivotal to preparing preparing the bill at the end of each month. Therefore, each team member is to log their time and submit it to the legal administrator so it can be entered the spreadsheet for monthly billing to the client.

Document filing is handled the legal receptionist when it comes to any physical documents that has been accumulated. The electronic filing of documents and organization is the responsibility of the paralegal and the legal secretary handles the calendaring of events for easy retrieval.

Docket control is the role of the law clerk, therefore request for discovery and how it is handle is supervised by the law clerk since she sits closely by the judge. The law library and other legal software and research is handled by the law clerk as well. As for making sure this software is up to date the IT Technician is responsible so that we can stay current with changes within the law and judgements.

**Part 4-Billing Practices**

CONSULTING & RETAINER AGREEMENT

This Agreement is made effective as of \_\_\_\_\_\_\_\_\_\_\_ 2019, by and between \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and Divide and Conquer Law Firm, 1111 Lime Street Oklahoma City, 78789.

In this Agreement, the party who is contracting to receive services shall be referred to as "Client", and the party who will be providing the services shall be referred to as "Divide and Conquer Law Firm, LLP’s".

Divide and Conquer Law Firm, LLP’s has a background in Case Law, Family Law and Legal Representation and is willing to provide services to Client based on this background. Client remains responsible for all their decisions.

Client desires to have services provided by Attorney.

Therefore, the parties agree as follows:

1. DESCRIPTION OF SERVICES BEGIN on \_\_\_\_\_\_\_\_\_\_\_\_ 2019, Divide and Conquer Divorce and Child Custody Law Firm, will provide the following services (collectively, the "Services"): Assist Client as they seek our services. Services are billed at $\_\_\_\_\_\_\_\_ per hour.

2. PERFORMANCE OF SERVICES. The manner in which the Services are to be performed and the specific hours to be worked by This shall be determined by The Equity Partner. Client will rely on our firm to work as many hours as may be reasonably necessary to fulfill our obligations under this Agreement.

3. RETAINER/PAYMENT. Client will pay a retainer to Divide and Conquer Law Firm LPP’s for the Services in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_ This fee shall be payable in advance upon contract signing. This retainer is non-refundable. Divide and Conquer Law Firm shall bill first to the retainer. Upon depletion of retainer, Client shall pay additional fees, if any, upon presentment of a billing statement by Divide and Conquer Law Firm, LLP’s.

4. EXPENSE REIMBURSEMENT. Divide and Conquer Law Firm, LLP’s shall be entitled to reimbursement from Client for the following "out-of-pocket" expenses: travel expenses and travel related meals.

5. SUPPORT SERVICES. Client will provide the following support services for the benefit of Divide and Conquer Law Firm, LLP’s: Provide all documents and information necessary to complete Services

6. TERM/TERMINATION. This Agreement shall terminate automatically upon completion by Divide and Conquer Law Firm, LLP’s of the Services required by this Agreement or 1 year from the effective date of this agreement.

References

[**www.bcgsearch.com**](http://www.bcgsearch.com)

{Law Firm Titles the difference between Law Firm Managing Partners, Partners, Income, or None Equity Partners, Associates, and Of Counsel Attorneys.) (Law-Firm-Titles-You-Should-Know-About n.d)

[www.ParalegalLaw.com](http://www.ParalegalLaw.com) (What does a legal Administrator do, 2015)

[**www.paralegaledu.org/law-clerk/**](http://www.paralegaledu.org/law-clerk/)

[**http://legalcareerpath.com/law-clerk/**](http://legalcareerpath.com/law-clerk/)

[**www.thebalancecareer,com/legal-receptionist-2164349**](http://www.thebalancecareer,com/legal-receptionist-2164349) **(**By: Sally Kane; updated 2019)

[**www.static.wixstatic.com**](http://www.static.wixstatic.com)

[**www.sampletemplates.com**](http://www.sampletemplates.com)