



Creedon PLLC Handbook

Updated July 27, 2021

About This Handbook

This Handbook contains Creedon PLLC's ("the Firm" or "Creedon") current policies and practices for the guidance of all our Principals, Attorneys, and staff. It is your guide to understanding how we work, your responsibilities as part of our team, and what you can expect as we expand our legal practice. As we grow and change, this Handbook will also evolve, and some changes may be made without advanced notice.

It is your responsibility to read and understand this Handbook, and to direct any questions to a Principal of the Firm. The most updated version of this Handbook will always be available on our electronic file system.

Policies and practices described in this Handbook do not constitute, nor should they be relied on as, contractual obligations of the Firm to its lawyers, staff, or anyone else. Nothing in this Handbook guarantees any specific rights or limits the ability of the Firm, its members, and its employees to terminate the relationship at any time, for any reason, in accordance with the Creedon PLLC Company Agreement.

Our Mission

Welcome to Creedon! We have a vision — a legal team that works with the best creative minds to build a healthy world full of beauty and opportunity. Our Mission crystallizes this dream into a single phrase which guides our work each and every day:

WE	Working together as a team allows us to share our strengths, address our weaknesses, and provide complete counsel to our clients. We deeply value collaboration, transparency, and mutual support.
HELP	Our team is only one part of a larger effort, and we understand our role is to assist others by being the best we can be in our areas of expertise.
INSPIRING	We are motivated by a deep desire to be part of something larger than us that will last far beyond our time on this planet, and we thrive on work that instills hope.
PEOPLE	Every project has human beings at its core: from a single artist in a studio to an international corporation employing thousands. We respect people and we listen to their authentic voices.
BUILD	Creating a better world takes time and effort, requiring patience and commitment in the face of obstacles. We embrace this challenge and take the long view of our shared destiny.
ONE	Although each of us experiences the world differently, we all share the same reality. We are all in this together, and we appreciate how our actions have effects ranging from our neighborhood to our planet.
AMAZING	All of us can improve our lives and the lives of those around us. We believe that astounding possibilities are within reach every single day.
FUTURE	Tomorrow is coming and is shaped by the decisions we make today. We are all-in on a shared future which exemplifies the best parts of the human spirit.

Our Values

Our Values set our expectations for each of us — they are a filter we can use when making decisions about how we work, strategize, communicate, and practice law. We place these front-and-center with our clients in our Legal Services Agreement. As we tell each client: “At Creedon, we have three values that guide our practice. As we work with you, we will often refer to these (and you can hold us to them).”

DO IT	Action over words — we are proactive.
DO IT RIGHT	Quality over quantity — our best work every single day.
DO RIGHT	Integrity over profit — we respect our clients and our team.

Our Goals & Metrics

Every mission needs goals — and specific metrics to measure whether we are actually creating the future we aspire to. At Creedon, we use two tools to keep us on track.

First, we are committed to [B Corp certification](#). Doing so requires us to regularly measure and report on our operations, producing an annual public scorecard rating us on our internal governance, consideration of workers, commitment to community, and sensitivity to our environment. We are actively seeking B Corp certification under the current [certification standards](#). This requires us to regularly revisit the B Corp certification process, and to continually work on improving the role our firm plays as part of the [conscious capitalism movement](#).

Second, we have our One Future Dashboard. At Creedon, we dedicate 5% of our gross revenue and billable hours to “good works,” and our public website dashboard reports how those funds and hours are directed towards two urgent crises we believe overlap and intertwine: the emergency of climate change, and the increasing disparity of wealth and opportunity. We believe in leveraging our resources to directly address these crises today, and to providing investment in long-term solutions by supporting people and their aspirations. We call this our One Future Initiative.

GOALS & METRICS

- **GOAL: Financial Support.** Donate 5% of gross revenue to “good works” causes focused on environmental issues and the long-term alleviation of poverty.

METRIC: 5% of our gross revenue (defined as all Firm income excluding pass-through expenses) is directed to organizations, projects, and people with a clearly defined need and a planned purpose to address the environmental emergency and/or overcome economic adversity. This percentage is calculated on a quarterly basis and reported on our One Future Dashboard.

EXAMPLE: During a single quarter, the total dollar amount earned through legal work (excluding pass-through costs such as filing fees) is \$500,000. 5% of this amount, or \$25,000, will go towards “good works” spending.

- **GOAL: Community Service Projects.** Provide hands-on non-legal support to our community by assisting in public service projects focused on environmental issues and/or the long-term alleviation of poverty.

METRIC: Dedicate the equivalent of 2.5% of billable time (excluding pro bono legal work) to hands-on, boots-on-the-ground projects with public service projects focused on environmental issues and/or the long-term alleviation of poverty. This percentage is calculated on a quarterly basis and reported on our One Future Dashboard.

EXAMPLE: During a single quarter, we collectively perform 2,000 billable hours of legal work. Our goal is to perform 50 hours of hands-on, non-legal service work such as street cleanup or building furniture for homelessness transition shelters.

- **GOAL: Pro Bono Legal Assistance.** Provide pro bono and discounted legal services to environmental projects and/or low-income clients to provide quality access to counsel to improve opportunity and long-term success.

METRIC: Dedicate 2.5% of billable time (as measured in hours of pro bono work or prorated equivalent in discounts) to low-income clients and/or environmental projects. This percentage is calculated on a quarterly basis and reported on our One Future Dashboard.

EXAMPLE: During a single quarter, we collectively perform 2,000 billable hours of legal work. Our goal is to perform 50 additional equivalent hours of tracked pro bono legal work — this may be 50 hours of time at zero cost, 100 hours of time at half-rate, or some combination of varying rates.

Our Roles

In our daily operations with our clients, we use three labels to discuss the role of each attorney: the Originator, the Responsible Attorney, and the Biller.

THE ORIGINATOR

Every client has an Originator — the lawyer that brought that client into the Firm. There is only one Originator for a client, and that Originator receives credit for their role even if they never do a single minute of legal work for that client. The Compensation Policy establishes the percentage of collections payable to the Originator (currently 20%), and our lawyers are responsible for establishing agreements between themselves when there is dispute as to who should receive credit as the Originator.

THE RESPONSIBLE ATTORNEY

Every client has a single Responsible Attorney — the primary point of contact at the Firm responsible for managing that client's matters. From the client's point of view, the Responsible Attorney is the face of the Firm and is the point of contact for any questions or concerns. The Responsible Attorney performs at least the following tasks:

- Prepares and secures the Legal Services Agreement for the client
- Establishes the client's contacts and matters on Clio
- Reviews, approves, and sends the client's invoices
- Coordinates the work of Billers
- Responds to all questions from the client
- Closes out client matters when complete

THE BILLER

A Biller is any lawyer or staff providing legal services for a client, and matters can (and often do) have multiple Billers.

How We Work

We can only succeed when our clients are genuinely impressed by us — by our responsiveness, by the quality of our work, and by our commitment to choose “the hard right over the easy wrong.”

DO IT — OUR DUTY OF RESPONSIVENESS TO OUR CLIENTS AND EACH OTHER

In a cloud-based law firm, each of us can work from the location we choose and during the hours we choose. We must balance this freedom with our commitment to regular and consistent communication with our clients and with each other.

Cloud-working and Communications

Each person in our Firm has three primary tools for electronic communication — email, telephone, and Slack — and is expected to check these and respond to communications during business hours.

- **Email** Every member of our team has an email account through Google Workspace, which is the Google suite of services and is often the primary way we communicate with clients. Questions on email service can often be answered by visiting [Gmail Support](#).
- **Telephone** Every member of our team can be contacted through the central Firm telephone number (972-850-6864), but you may use the [Ruby](#) app to dial out with the Firm number. You may prefer to instead separate business and personal calls with a service such as [Google Voice](#).
- **Slack** Every member of our team has a Slack account for internal communications, divided into internal firm channels (channels for particular clients and also channels for firm communications) and shared channels for communication with particular clients.

Remaining in regular communication is critical, but these rules don't apply when we have personal emergencies, vacations, or leaves of absence. For those times, every member of our team is expected to notify their colleagues of their unavailability so nothing falls through the cracks. Further, whenever possible, we should set an out-of-office [email message](#) and voicemail message to notify others of the dates that we will be out of the office, and provide the name, phone number, and email of another lawyer that can handle any issues during our time away.

Unfortunately, few things hurt our ability to provide top-quality service as much as ignoring communications — consistent failure to follow this guidance could lead to removal from the Firm.

Note that all information systems are Firm business records. THE FIRM RESERVES THE RIGHT TO MONITOR ALL ATTORNEY COMMUNICATIONS, INCLUDING TELEPHONE CALLS AND ELECTRONIC MAIL, ON ITS INFORMATION SYSTEMS AND TO ENTER ATTORNEY ELECTRONIC MAIL, COMPUTER FILES, AND FIRM VOICEMAIL RECORDS AT THE FIRM'S DISCRETION. THUS, EVERY ATTORNEY SHOULD UNDERSTAND THAT THEIR PERSONAL COMMUNICATIONS VIA THE FIRM'S INFORMATION SYSTEMS ARE SUBJECT TO MONITORING BY THE FIRM. ATTORNEYS SHOULD HAVE NO EXPECTATION OF PRIVACY.

Regular Mail

Our physical addresses are mail drops from which we likely only receive mail once per week. Because this is an administrative burden, you should only have work-related correspondence sent to these addresses. This does not include CLE and bar-related materials, which should go to your home address. You may wish to set up your own alternative postal address to receive work-related mail, you or may coordinate with the virtual office location to pick up mail there.

DO IT RIGHT — OUR RESPONSIBILITY TO BRING VALUE

Professional Standards

We aspire to produce high-quality legal work at a reasonable billing rate to our clients. This means we are either already knowledgeable about the legal task we are taking on, or we have a clear plan on how to properly gain the skills necessary for the work. Our lawyers should periodically review our standard Legal Services Agreement to understand the commitments we are making to our clients, and should be proactive when issues arise.

Our professional standards include being transparent with clients about our pricing. We should provide budgets whenever possible, and update the client if we expect to exceed those budgets. This approach improves client satisfaction and decreases the risks of billing disputes.

Creedon is a “fail forward” firm, meaning that we encourage a culture of proactively and honestly identifying errors so that we can address them head-on and improve our practice. Each of us must be forthcoming about potential issues we may face with our clients, and deliberate in drawing lessons from our errors and sharing them out. Further, any member of our team expecting a significant complaint from a client must notify a Managing Principal as soon as possible.

DO RIGHT — OUR ETHICAL AND PROFESSIONAL RESPONSIBILITIES

Creedon is committed to the highest standards of ethical and professional conduct. We must act with integrity and honesty, choosing the hard right over the easy wrong. This includes serving our clients to the fullest and providing them with the highest quality legal work. We have developed the following standards of ethical and professional conduct to advise all lawyers about our expectations and the consequences that will result if these expectations are not met. Lawyers that fail to comply with these standards will be subject to removal from the Firm.

ABA and State Rules and Requirements

All lawyers must adhere to the American Bar Association Model Rules of Professional Conduct as well as the legal ethics and professional responsibility requirements of each state in which the individual is licensed to practice law. Any potential client conflict or other ethical issues should be brought to the attention of a Managing Principal at the earliest possible time, and the instructions of a Managing Principal should be promptly followed. In addition, each of you is expected to consult and follow any Firm policy that is distributed to you and posted on our document management site.

Bar Membership and Other Licenses

Principals are responsible for timely paying their bar dues and maintaining appropriate bar licenses as lawyers in good standing, as well as for maintaining any other professional or business licenses required by their practice. Principals are also responsible for paying for and complying with all continuing legal education requirements required by the states in which they are licensed. For Attorneys, the Firm will cover the expense of one state bar and one local bar association membership, and may periodically offer payment or assistance for continuing legal education. You are required to notify a Managing Principal immediately if you receive notice that your law license is under investigation or is being suspended, revoked, or if you are no longer in good standing.

Likewise, you need to advise a Managing Principal immediately if you receive notice that you are being sued for malpractice, if a client threatens such a suit, or if a client communicates in a way which leads you to believe a claim could be possible (either with the bar or in the form of a malpractice claim). You should advise a Managing Principal first, whenever possible, before discussing the matter with the applicable client. You are subject to immediate removal for violation of these policies and for any bar disciplinary action. Importantly, you are prohibited from contacting or reporting information relative to potential malpractice claims directly to the Firm's insurance broker or carrier; all such information must be routed through the Firm's Managing Principals.

In the event you are licensed in any other trade or profession (e.g., CPA, customs agent, etc.), you are required to abide by any applicable laws, rules and regulations pertaining to the practice of that profession, and to ensure that adequate professional liability insurance is in place to cover their practice in non-legal fields. You may not market to or otherwise solicit Firm clients for any services other than legal services, and must obtain the approval of a Managing Principal prior to providing non-legal services to any past or current Firm client.

Our malpractice insurance excludes legal work performed for clients where a lawyer acts in some control capacity of such client (i.e., board seat, executive position, material stockholder). Lawyers serving in this type of relationship with a client may not perform legal services for that client — although other lawyers may do so) unless and until a proper endorsement has been added to the Firm's malpractice policy. The lawyer needing such additional coverage will be responsible for the premiums for this endorsement or rider (if any).

Confidential and Proprietary Information

The protection of confidential and proprietary business information is vital to the interests and success of the Firm. Such confidential and proprietary information includes our business model; hiring and recruiting strategies; prospective client lists; financial information (including budgets and expenses); client lists and client billing information; marketing plans and strategies; internal security codes and passwords;

and our form documents, copyrights, and other intellectual property. Anyone who improperly uses or discloses confidential or proprietary business information will be subject to immediate removal from the Firm.

Anyone aware of any compromise or potential compromise of our confidential information (for example, the loss of a laptop or mobile device) must immediately notify a Managing Principal. Further, we require that all Firm or client confidential information be delivered only by a traceable delivery method (such as certified mail).

Personal Conflicts of Interest

An actual or potential conflict of interest occurs when a firm lawyer or staff member can influence a decision that may result in personal gain, or gain for a relative, as a result of the Firm's business dealing. For the purposes of this policy, a relative is any person who is related by blood or marriage, or whose relationship is similar to that of persons who are related by blood or marriage. Personal gain may result not only in cases where a team member or relative has a significant ownership interest in a company with which the Firm does business, but also when a team member or relative receives any kickback, bribe, substantial gift, or special consideration because of any transaction or business dealings involving the Firm.

You must disclose to a Managing Principal the existence of a potential personal conflict of interest or business relationship between or involving your relatives.

How We Bring In New Clients

CONFLICT CHECKS

In determining whether the Firm has a conflict in a particular representation, each lawyer must both manually run a search in Clio and send a conflict check e-mail using our [Conflict Check form](#).

Where the conflict check discloses a "hit," indicating a potential conflict, the individual must contact the Firm lawyers involved with the parties giving rise to the potential conflict, and then consult applicable ethics rules to determine whether a conflict is present. If there is any doubt as to whether a conflict is present, you must contact a Managing Principal. You may be referred to the ethics hotline of the applicable bar, in which case it is your responsibility to make use of the hotline and follow the advice given. Where it is determined that a conflict waiver should be obtained, the waiver should be drafted in accordance with applicable ethics rules and should be reviewed by a Managing Principal before it is issued to the client.

NEW BUSINESS ACCEPTANCE

We maintain certain policies regarding new business acceptance. Provided that we have a lawyer competent to perform the work, there are generally only five reasons to turn down a new representation: (1) a current client presents a legal conflict, (2) a current client presents a business conflict that the Firm has agreed to in writing (for example, a written agreement not to represent competitors), (3) the new representation would be notably adverse to a large potential client of the Firm without a material benefit to the Firm (e.g., low-dollar litigation), (4) the potential client would be in direct conflict with the Firm Mission or Values, or (5) the new matter would place the Firm in an unfavorable light. Otherwise, we welcome new business and new areas of opportunity.

LEGAL SERVICES AGREEMENT AND RETAINERS

Upon obtaining a new client, the Responsible Attorney must create and secure a Legal Services Agreement with the client. A template of our current standard Legal Services Agreement is located [here](#), and this template must be used for new clients or new matters for existing clients when necessary.

In normal circumstances, legal work should not be undertaken until a signed Legal Services Agreement has been secured (exceptions may be made for urgent projects where the parties have come to terms on the scope and fees for the project which have been confirmed in writing by the lawyer to the client). For engagements beyond the initial one described in the engagement letter, care should be taken to properly describe in writing (and appropriately limit the scope of) the new matter, including proper description of which client entity is the client.

Our policy is to obtain retainers from new clients in general, and particularly from those who are a questionable credit risk. Retainers may be refundable, or work may be paid based on flat rate billing.

The Responsible Attorney must establish the Clio client and matters records as well as the folders in our file system.

How We Get Compensated

EQUITY PERCENTAGE

Upon joining the Firm, Principals receive an Offer Letter that identifies Equity Percentage. The Offer Letter together with the Company Agreement and this Handbook set forth the terms of your membership in the Company.

RETAINERS/UNCOLLECTED INVOICES

Principals bear the risk of non-payment by clients for whom they do work, whether or not the Principal is the Responsible Attorney. This same risk holds true for all Originators. As a result, we recommend that you confirm retainers as often as possible. All Principals may insist on retainers as a condition of accepting work for a client and are encouraged to do so.

Attorneys must obtain the approval of a Principal prior to writing off any uncollected amounts, and also prior to reducing or removing any billable time from a client's invoice.

Principals are expected to ensure that a billable matter is collectible prior to taking on an engagement, and if there is any question, the engagement should be supported by a replenishing retainer.

TIMEKEEPING

The Firm expects its lawyers to accurately and timely record their time as incurred. Under our Legal Services Agreement, we do not generally charge for local travel, brief calls on new matters, or basic office expenses. Each of us is responsible for reviewing the Firm [billing guidelines](#), and for complying with the assurances we make to our clients in our Legal Services Agreement. Altering, falsifying, or tampering with time records may result in disciplinary action, up to and including removal from the Firm.

Time must be entered by the close of the second business day of each month. Failure to do so may result in billable time not being included on that month's invoice and not being paid for the work performed for an additional 30 days (at a minimum). Failure to submit time in accordance with the deadline above for two months in a row may result in a Principal's time not being billed at all. Responsible Attorneys are expected to invoice their clients through the Firm at least monthly (usually within a day or so of receiving such invoices from the Firm's accounting group), unless a different arrangement is in place with a client.

FIRM FINANCIAL INFORMATION

The Firm does not provide summary information regarding the annual draws or originations on a firm-wide basis. Like most law firms, Creedon does not provide a detailed audit of the Firm's finances to all lawyers and staff. In accordance with the Company Agreement, the Principals will receive no less than annually an overview of the Firm's revenue and expenses.

REIMBURSEMENT FOR QUALIFIED EXPENSES

Qualified expenses are those that are incurred on behalf of the Firm with the authorization of a Principal. All expenses must include a receipt that clearly shows the total amount paid, the date, the name and location of the client, and the purpose of the expense.

FILING FEES AND OTHER CLIENT EXPENSES

We do not prepay any filing fees or other expense amounts for clients. For this reason, a check or credit card payment may only be requested on a Firm account if a retainer is in place to support that payment. Any client expenses incurred outside of this policy will be paid by the Responsible Attorney if not covered by the client.

TRAVEL AND OTHER EXPENSES

All lawyers are responsible for ensuring that any travel or similar expenses considered reimbursable by a client are approved and documented consistent with client guidelines. In the event you are working for another Responsible Attorney's client, check with them as to any applicable policy. Expenses that will be reimbursed by clients may be entered into the timekeeping system as an "Expense" slip and will be paid after the Firm receives payment from the client, provided the expense is labeled as a reimbursement.

TAXES

Creedon covers the cost of its internal bookkeeping functions (Accounts Payable, Accounts Receivable, client invoicing, etc.) and utilizes a CPA firm to prepare K-1s for each Principal as part of preparation of the Firm's annual tax returns. Principals are expected to strictly abide by Firm deadlines with regard to the preparation of each Principal's K-1. The Firm reserves the right to pass through to any Principal charges for additional accounting services or other fees made necessary by a Principal's delay in this regard.

Principals are responsible for timely filing their federal and state income tax returns. We strongly suggest that you consult with a CPA of your own choosing (and counsel should you so desire) to understand the federal and state tax implications of joining Creedon, whether through an entity or individually.

James Creedon is the Managing Principal responsible for Firm tax matters, and any questions regarding Firm tax issues should be directed to him. Any questions concerning day-to-day accounting or bookkeeping matters should be addressed to accounting@creedon.com.

ATTORNEY RECRUITMENT

Firm lawyers are entitled to 2% of the first-year revenue generated by each new attorney they recruit to the Firm. Recruiting compensation is payable only during the time the recruiting and the recruited lawyers are with the Firm. This policy is subject to change prospectively with or without notice by the Managing Principals.

The Firm will generally seek out lawyers who have practiced at a larger law firm or a large in-house legal department. A strong educational and academic background is also required. Recruits should have been practicing law for a minimum of seven years, be in good standing with the applicable Bar in their state of residence, and be comfortable practicing independently and without supervision. Finally, while exceptions are made in various circumstances, Principals should have a book of business sufficient to support themselves while at the Firm, including the conservative assumption that the recruit will not receive any work as a Biller from other lawyers at the Firm. This final requirement is designed to minimize turnover at the Firm.

ATTORNEY BENEFITS

Health Insurance

Our health insurance plan provides lawyers and staff, and their dependents, access to medical insurance benefits. Principals are required to cover all health insurance costs at their own expense and, for Attorneys, the Firm covers the costs of the premium of the individual Attorney. As of the effective date of this Handbook, all eligible lawyers and staff are permitted to enroll themselves and their family members in our group plan. The class of eligible individuals will be determined from time to time by the Managing Principals in consultation with our insurance broker, and may change as needed to ensure the continuing availability of group coverage for individuals in the Firm.

For participating Principals, monthly premiums will be deducted from the Principal's draw at the beginning of the month. If a Principal's draw is not large enough to cover the premium, then they are responsible for paying their premium to the Firm before the first day of the month. Failure to comply with this policy may result in expulsion from the Firm.

Details about the health insurance plan are described in the Summary Plan Description ("SPD") for such plan. An SPD and information on cost of coverage will be provided in advance of enrollment to eligible individuals. In the event of any discrepancy between language in the SPD and this Handbook, the language of the SPD shall be controlling.

The federal Consolidated Omnibus Budget Reconciliation Act ("COBRA") gives covered individuals and their qualified beneficiaries the opportunity to continue health insurance coverage under the Firm's health plan when a "qualifying event" would normally result in the loss of eligibility. Some common qualifying events are resignation, withdrawal as a Principal; a reduction in an individual's hours or a leave of absence; a divorce or legal separation; and a dependent child no longer meeting eligibility requirements.

Under COBRA, the beneficiary pays the full cost of coverage at the Firm's group rates plus an administration fee. The Firm provides each eligible individual with a written

notice describing rights granted under COBRA when the individual becomes eligible for coverage under Firm's health insurance plan. The notice contains important information about the individual's rights and obligations.

Retirement Plans

At this time, the Firm offers a SIMPLE IRA plan with 3% matching.

General Firm Policies

Presentation

Our Firm prides itself on building a team of individuals from a variety of backgrounds and experiences and we welcome individuality and uniqueness. As professionals, we appreciate the standards our clients expect from us. Business casual dress code is required for in-person and videoconference meetings, including internal meetings at the Firm. Further, internal communications such as email and Slack messages must be respectful and related to our legal practice.

Support Staff

Lawyers needing paralegal or support staff assistance must contact a Managing Principal to discuss permissible approaches to fulfill this need. Principals may not employ W-2 paralegals individually without such consultation.

Breastfeeding Policy

We provide a supportive environment for breastfeeding employees, and we will always permit reasonable breaks to allowed employees to breastfeed or express milk during work hours. In any office spaces we utilize, we will make our best efforts to identify and provide for a private and sanitary room (not a toilet stall or restroom) for these purposes, located near a sink with running water for washing hands and rinsing out breast pump parts, and having an electrical outlet. If employees prefer, they may also

breastfeed or express milk in their own private offices. Expressed milk can be stored in a personal cooler, a personal refrigerator, or in a designated section of an office-wide refrigerator. Each employee is responsible for proper storage of expressed milk, and employees should label all milk expressed with their name and date collected so it is not inadvertently confused with any other items. Employees are also responsible for keeping any provided general lactation room clean for the next user. This responsibility extends to both designated milk expression areas, as well as other areas where expressing milk will occur.

Uniformed Services Employment and Reemployment Rights Act

The Uniformed Services Employment and Reemployment Rights Act (USERRA) provides certain rights to persons who perform duty, voluntarily or involuntarily, in the uniformed services and meet certain tests. Speak to a Managing Principal or visit the [United States Department of Labor USERRA web site](#) for more information

Holidays

The Firm recognizes the following holidays and closings:

- New Year's Eve — Early close
- New Year's Day — Firm closed
- Good Friday — Early close
- Memorial Day — Early close Friday before & office closed on Monday
- Juneteenth — Firm closed
- Independence Day — Firm closed
- Labor Day — Early close Friday before & Firm closed on Monday
- Freedom Day (September 11) — Firm closed
- Thanksgiving — Early close Wednesday & Firm closed Thursday and Friday
- Christmas Eve — Firm closed
- Christmas Day — Firm closed

The Firm recognizes that many religions have important holidays differing from those

above, and will work with all members of our team to provide time off on those days. Additionally, no team member is expected to work on their birthday — enjoy your day!

Time Off

The Firm does not have any standard sick day or vacation day policy, but rather seeks to balance the needs of our clients with those of our team members. Vacations and time away are important for mental health, so the Firm requires you to take at least two weeks off per calendar year. Further, five weeks of fully-paid parental leave is available to anyone welcoming a new child into their family.

STANDARDS OF CONDUCT

Equal Employment Opportunity Policy

Creedon aspires to be a firm of many backgrounds and cultures. The Firm is committed to maintaining an environment free of discrimination and harassment. To that end, the Firm does not tolerate harassment or discrimination against a member of our team, applicant, client, or vendor on any basis protected by applicable law, or in any way which contradicts our values of openness and inclusion, such as gender identity. Engaging in any activity that violates this Equal Employment Opportunity Policy may result in removal from the Firm. Retaliation against anyone who makes a good faith complaint of discrimination or harassment, or who participates in an investigation of such a complaint, will be deemed a violation of this Equal Employment Opportunity Policy and will not be tolerated.

Harassment Policy

The Firm is committed to providing a workplace free of sexual harassment, as well as harassment based on any factor protected by applicable law or harassment in violation of our values. Harassment of team members, applicants, clients, or vendors in any form is unacceptable and will not be tolerated.

Conduct prohibited by the Firm includes, but it is not limited to, unwelcome sexual advances, requests for sexual favors, and/or other verbal, visual or physical conduct of

a sexual nature where: (a) submission to such conduct is made either explicitly or implicitly a term or condition for some benefit; (b) submission to or rejection of such conduct by a lawyer is used as a basis for matters affecting the lawyer; or (c) such conduct has the purpose or effect of unreasonably interfering with a lawyers or staff member's work performance or creating an intimidating, hostile, or offensive working environment.

You are prohibited from offering, promising, or granting preferential treatment to any Firm lawyer or staff, applicant, client, or vendor as a result of that individual's engaging in or agreeing to engage in sexual conduct. An intimidating, hostile, or offensive working environment may be created by such circumstances as pressure for sexual activities, unwanted and unnecessary physical contact with another individual, verbal abuse of a sexual nature, the inappropriate use of sexually explicit or offensive language or e-mail, or the display of sexually suggestive objects or pictures.

Similarly, a racially hostile working environment may be created by such things as verbal abuse of a racial nature and the use of racially derogatory terms. Other hostile work environments may be created by the use of epithets, slurs or derogatory terms based upon an individual's physical characteristics or participation or membership in (or adherence to) any group, culture, religious faith, or organization.

Creedon is equally committed to protecting the integrity and character of its lawyers and staff. Accordingly, false assertions of harassment or discrimination will not be tolerated and will be dealt with equal commitment through the complaint procedure and investigative process.

Complaint Procedure

If you believe that you have been a victim of discrimination or harassment by a team member, applicant, client, or vendor in connection with your employment at the Firm, you should report your complaint to report@creedon.com. You may also send a certified letter marked "Personal and Confidential" to Report, Creedon PLLC, 5 Cowboys Way, Suite 300, Frisco, Texas 75034.

The Firm will promptly investigate all charges of harassment and discrimination and will take appropriate corrective action, if warranted, based on the results of the investigation. The Firm will not tolerate retaliation in any form against any team member, applicant, client, or vendor who makes a good-faith complaint of discrimination or harassment.

Any individual who is determined by the Firm to have engaged in inappropriate conduct or harassment in violation of this policy will be subject to appropriate disciplinary action, up to and including removal from the Firm. Anyone determined by the Firm, because of such an investigation, to have made an intentionally false allegation of harassment may be subject to appropriate disciplinary action, up to and including removal from the Firm.

Intoxicants & Safety

Alcohol and other intoxicants can be dangerous if consumed irresponsibly. From time to time, you may attend Firm functions and entertain clients in settings where intoxicants are available. Excessive drinking or use of other intoxicants at these events is not only bad business; it could also pose a danger to you and to those around you. If you choose to drink or use intoxicating substances at these functions, you must do so responsibly.

You are not permitted to drive following a Firm function (including holiday parties, picnics, Firm meetings, business development outings, recruiting functions, etc.) if your ability to drive is impaired. If you believe that you may not be able to drive safely, you must either get a ride from someone else or use a rideshare service. The Firm will reimburse the cost for this — no questions asked. If you believe that another member of our team is unable to drive safely, you should strongly encourage them to use a rideshare service, or you should contact a Managing Principal for assistance.

Further, if you attend any Firm function and believe that a client, an applicant, or any other guest of the Firm at such function is too impaired to drive, the above policy (including reimbursement for a rideshare service) applies.

For this policy to work, we must keep an eye out for one another. If you feel uncomfortable confronting anyone you believe is intoxicated, notify a Managing Principal. You will not be getting the person in trouble — you may be saving their life.

Attendance and Punctuality

You are expected and required to attend all regular Firm meetings, except in cases of vacations, personal leave, unavoidable client commitments, or other similar situations.

The Firm expects you to be reliable and punctual in reporting for scheduled Firm and client meetings. Absenteeism and tardiness are unprofessional. In the rare instances when you cannot avoid being late or are unable to attend a meeting as scheduled, you should notify another attendee as soon as possible in advance of the anticipated tardiness or absence.

Poor attendance, excessive tardiness, or failure to comply with policies may lead to disciplinary action, up to and including removal. If you are absent or unreachable by phone or e-mail for three business days without notifying the Firm, the Firm may assume that you have voluntarily abandoned your position.

Unauthorized Use or Removal of Firm Property

To ensure its ability to efficiently conduct business and to protect valuable confidential and proprietary information, the Firm prohibits the removal or unauthorized use of any Firm property, including computers, equipment, records, documents, document management system contents, or files (whether reduced to a hard copy or maintained in an electronic/magnetic medium) during or after membership with the Firm. Violation of this policy is grounds for disciplinary action, up to and including removal from the Firm and/or forfeiture of any earned payments.

Lawyers departing the Firm should be aware that the work product and client materials will not be released to them until the Firm receives a written request from the client to release them.

Inappropriate Conduct

It is not possible to list all the forms of unacceptable behaviors. The following are examples of infractions of rules of conduct that may result in disciplinary action, up to and including removal from the Firm:

- Theft or inappropriate removal or possession of property;
- Falsification of timekeeping records;
- Yelling or excessive belligerence;
- Fighting or threatening violence while conducting Firm business or at a client's place of business;
- Inappropriate or disrespectful conduct;
- Sexual or other unlawful or unwelcome harassment;
- Excessive absenteeism or tardiness, or any absence without notice;
- Violation of Firm policies; and/or
- Unsatisfactory performance.

Progressive Discipline

Although your relationship with the Firm is based on mutual consent, and both you and the Firm have the right to terminate the relationship at will, with or without cause or advance notice, the Firm may use progressive discipline at its discretion.

Progressive discipline means that, with respect to most disciplinary problems, these steps will normally be followed: a first offense may call for a verbal warning; a next offense may be followed by a written warning; another offense may lead to a suspension from the Firm; and still another offense may then lead to removal from the Firm. There are certain types of issues, however, that are serious enough to justify either a suspension or removal, without going through the usual progressive discipline steps. Disciplinary action may involve any of four steps — verbal warning, written warning, suspension or removal — depending on the severity of the problem and the number of occurrences.

PERSONAL DATA CHANGES

It is your responsibility to promptly notify the Firm's administrative and accounting groups (admin@creedon.com and accounting@creedon.com respectively) of any changes in your personal data. Personal mailing addresses, personal telephone numbers, and other such information should be accurate and current at all times.

RESIGNATION OR REMOVAL FROM THE FIRM

Removal

Since your relationship with the Firm is at-will and based on mutual consent, both you and the Firm have the right to terminate the relationship at will, with or without cause, at any time. Note that the Company Agreement requires Principals who decide to leave provide at least fourteen days' prior notice to a Managing Principal. However, such notice will not change the Principal's at-will status during the remainder of the relationship.

Return of Property

All Firm-owned property, including, but not limited to, unused marketing materials and business cards, must be returned to a Managing Principal prior to your last day. Any and all client documents and files in your possession must be returned to a Managing Principal prior to your last day, subject to the client's contrary instructions. You will be held responsible for any loss, misuse, or failure to return Firm property or a client's property.

Acknowledgment Form

This is to acknowledge that I have received, or have online access to, a copy of the Creedon PLLC Handbook. I agree to familiarize myself with the material in the Handbook and govern my business conduct based on the contents of the Handbook, as it may be amended from time to time.

I also understand that the provisions of the Handbook do not constitute a contract. I understand that the provisions of the Handbook may be modified by the Firm in its sole discretion at any time without notice, and that it is my responsibility to review and comply with any updates to the Handbook or policies later disseminated by the Firm and posted to the Firm's document management system under "Firm Policies." Finally, I understand that my membership or employment is "at will" and that either the Firm or I may terminate the relationship at any time with or without notice, and with or without reason or cause.

Name: _____

Signature: _____

Date: _____