

## MODEST MEANS PROGRAM MENTOR APPLICATION

**INSTRUCTIONS:** Please review the program procedures for the SDCBA's Modest Means program, fill out this form completely, and return the completed form with a copy of the cover page of your professional liability insurance policy to the San Diego County Bar Association Lawyer Referral and Information Services ("LRIS") at 401 West A, Suite 1100, San Diego, California 92101.

Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
(Last) (First) (Middle)

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

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

Office Address: \_\_\_\_\_  
\_\_\_\_\_

State Bar Number: \_\_\_\_\_ Current LRIS member? Yes \_\_\_ No \_\_\_

Liability Insurance Carrier name: \_\_\_\_\_

Policy Limits: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ (attach declaration page)

Engaged in active law practice since Bar Admission: \_\_\_\_\_

Have you ever been disciplined in this or any other jurisdiction by a state or federal licensing agency?

Yes \_\_\_\_\_ No \_\_\_\_\_ (check one)

If your answer is yes to have ever been disciplined, by separate attachment fully disclose the nature of each disciplinary action taken, the name and location of the licensing agency involved, relevant date (s), and the final disposition.

(Note: All Lawyer Referral Services in California are required to inform clients referred of the nature of any disciplinary actions(s) taken against an attorney. Civil Code §43.95; Revenue and Taxation Code § 23734 (d). Moreover, the LRIS must determine the disciplinary status of all panel members and must disclose to the client the nature of any disciplinary action taken against the panel attorney and when the disciplinary action occurred. There is no prospective time limit on the duty to disclose disciplinary actions.).

**CERTIFICATION:** I have read and am familiar with the program procedures of the LRIS Modest Means Program and certify that I am qualified for appointment to the Family Law Mentor panel. I declare under penalty of perjury that the following is true and correct:

1. I am an active member in good standing of the State Bar of California.
2. I certify that:
  - a. I am either a Certified Family Law Specialist or a current member of the LRIS Family Law Panel;
  - b. I understand that I will not be entering an attorney-client relationship with the Service Attorneys' clients, but will nonetheless be directly contributing to the provision and improvement of legal services in San Diego County;
  - c. I will maintain communication with and be reasonable available to those Service Attorneys that are assigned to me and provide consultation, advice, and review of the practice and relationship with the assigned Modest Means Program clients as requested or desired by such Services Attorneys;
  - d. I will retain the client confidences revealed to me by the Service Attorney in connection with such consultations.
  - e. I will report to the Service Attorney and to the Modest Means Program administrator any difficulties of which I am aware in either the services being rendered to the client, the relationship between the Services Attorney and myself, or my ability to continue as a Mentor Attorney; and
  - f. I will maintain my competency in Family Law at a level qualifying me for placement on the LRIS Family Law Panel.

3. I agree to acquire and maintain professional liability insurance in the amounts of \$100,000 per claim and \$300,000 per policy year, or such other amounts as may be set by the LRIS Permanent Committee, and to provide annually proof of the existence of such coverage. I understand I can receive no referrals until proof of malpractice insurance has been received by the LRIS.

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

\_\_\_\_\_  
Signature

