



Anne Arundel Bar Association
Lawyer Referral + Information Service
PO Box 161 | Annapolis, MD 21404
phone: (410) 280-6961 | fax: (410) 280-6966
aaba@circuitcourt.org

Lawyer Referral + Information Service

Panel Member Application



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PO Box 161 | Annapolis, MD 21404
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Iris@aabar.org

LAWYER REFERRAL AND INFORMATION SERVICE MEMBERSHIP

ABOUT

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

FUNCTION

An in-house LRIS 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 LRIS Panelist. In this way, LRIS Panelists are **providing a meaningful public service while building their brands.**

COST

- **LRIS attorney membership is \$150 per fiscal year** for AABA members The annual fee for non-AABA members is \$215
- As a fee-based service, the **clients are required to submit an administrative fee of \$35** to counsel on the day of the discussion/consultation. Counsel remits this sum to the AABA. Additionally, if an LRIS-referred client is retained by your firm and the fees collected total \$200 or more, you must remit to the LRIS a referral fee of ten percent. LRIS fee is due within 30 days of receipt by panel member. All proceeds generated by the Lawyer Referral and Information Service are cycled back into the service for marketing, staffing, and technological improvements (see page five [5] for more details).
- The LRIS waives the \$35 Client fee in Social Security/Disability, Personal Injury, and Worker's Compensation matters, among other types of contingency cases.

CRITERIA

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

- Maintain a minimum of \$100,000 in malpractice insurance.
- Have handled a minimum of two (2) cases to conclusion, **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.
- Anne Arundel Bar Association membership is **not** a requirement for joining the LRIS.



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OUR PROCESS

Client Calls the Service

Once the Client's legal issue and geographic location are determined, the Client is given the name and telephone number of an appropriate LRIS panelist. The Client is advised to identify himself/herself as being referred by the LRIS, and is told that the \$35 .00 LRIS administrative fee will be payable at the time of the visit.

Referral is Transmitted

This 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 fourteen (14) days of receipt, irrespective of Client contact. If a conflict of any kind precludes you from completing a discussion/consultation with a Client, you must refer the Client back to the LRIS.

\$35 Administrative Fee is Collected:

The \$35 administrative fee must be collected at the time of the Client's visit, unless the matter is undertaken by your firm on a contingent basis, or could reasonably be expected to be undertaken by another firm on a contingent basis. Case types include Personal Injury, Social Security/Disability, and Worker's Compensation, among others.

Referral Fee:

In the event you retain a Client referred to you by the LRIS, you are required to remit a referral fee of ten percent to the Anne Arundel Bar Association on any case that generates fees in excess of \$200. LRIS fee is due within 30 days of receipt by panel member.

Please Remember:

Panelists risk losing membership privileges by failing to comply with the LRIS rules.



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Dear New or Returning Panelist:

Please find enclosed your AABA Lawyer Referral and Information Service (LRIS) application and invoice. To begin or renew, complete the following steps:

1. Review and complete pages four (4) through eight (8)
2. Complete the Panel Card indicating the areas of law in which you would like to receive referrals. You must meet LRIS criteria for all practice areas. See page five (5) for more details.
3. Mail your completed application, along with your annual membership fee of **\$150.000** to:

A.A.B.A., P.O. Box 161, Annapolis, MD 21404-0161

Our Client administrative fee is **\$35**. 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 AABA. Your referral confirmation will so note this payment, when applicable. You must return the administrative fee, if collected, along with the AABA Referral Record Form, to AABA 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 LRIS.

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

Sincerely,
Lisa Sheridan | Iris@aabar.org
LRIS Coordinator



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LRIS 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: _____



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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 Panel 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 LRIS. _____
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 LRIS rules or fees due LRIS arising from a referral. _____
4. The Client referred by the AABA **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 LRIS. _____
5. The Panel Attorney is responsible for collecting the \$35 administrative fee from the client and forwarding it to the LRIS. _____
6. The Panel Attorney will remit to the AABA a referral fee of ten (10) percent of fees paid and collected on LRIS cases that generate fees in excess of \$200. LRIS fee is due within 30 days of receipt by panel member. 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 AABA. _____
7. The Panel Attorney is responsible for accurately completing and returning the referral form to the LRIS within fourteen (14) days of referral receipt. The form may be e-mailed to Iris@aabar.org, mailed to **A.A.B.A., P.O. Box 161, Annapolis, MD 21404-0161**, or faxed to **(410) 280-6966**. _____
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 LRIS. _____
9. LRIS 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 LRIS of any changes in address, phone, or fax information. _____
11. Each Panel Attorney is responsible for notifying LRIS of any changes concerning the areas of law in which he or she will accept referrals. _____
12. Violation of LRIS rules and procedures may be brought to the attention of the LRIS Committee and the Executive Board of the AABA and could result in your suspension from the Lawyer Referral and Information Service Panel. _____



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14. 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 LRIS Committee, and the Executive Board of the AABA. Failure to comply with the LRIS rules and procedures may result in suspension of panel membership. _____

15. The LRIS is a service to the community and a major source of public relations for the AABA. Therefore, whenever possible, please accommodate any reasonable requests for information. Above all, please be courteous to all referrals. _____

16. The LRIS reserves the right to contact referred clients to evaluate client satisfaction and panel member adherence to LRIS policies. If a referred client contacts the LRIS and expresses a complaint regarding the attorney, the client will be provided the LRIS Complaint Form. If the form is returned to LRIS, the attorney may be temporarily suspended from the LRIS rotation until the complaint is reviewed and resolved by the LRIS Committee and/or Committee Chair. The Committee and/or Committee Chair will review issues that involve LRIS 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

 Signature of Panel Attorney



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GREY PANEL PARTICIPATION

The LRIS offers a Criminal Reduced Fee Panel (GREY PANEL). This panel is a part of the Lawyer Referral and Information Service and accepts clients who have been rejected by the Office of the Public Defender due to financial ineligibility. Clients are given a "Certificate of Rejection" from the Office of the Public Defender stating that they are financially ineligible for the Public Defender services. The client still pays the \$35 fee for the 30-minute consultation to the Lawyer Referral and Information Service, and **MUST** have the Certificate with them at the time of their appointment in order to receive a reduced fee. There is no set fee for the Grey Panel; the fee is negotiated between the client and the attorney.

I wish to sit on the Criminal Reduced Fee Panel.

Yes _____ No _____

HARDSHIP CONSIDERATION

Please indicate if your firm offers economic hardship consideration to Clients who request such consideration during the LRIS screening process. Clients are advised that firms arrive at hardship determinations based on criteria set forth by the firms themselves, and that we cannot guarantee a Panelist will agree to reduce his or her fee based upon any particular set of circumstances.

I will accept Clients from LRIS who request Hardship consideration.

Yes _____ No _____

PANEL CARD

On the attached Panel Card, I have checked the fields in which I have adequate experience sufficient to satisfy the requirement listed in #1 of this section, and therefore feel qualified to represent clients in matters therein.

Initials: _____



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MASTER AGREEMENT

I certify that I will abide by the referral procedures above-established by the Anne Arundel Bar Association Lawyer Referral and Information Service Committee and that I will:

1. **PERSONALLY** consult with persons referred by the LRIS for a period of at least 30 minutes for a referral fee not to exceed \$35.00 and to collect and forward the fee to the LRIS. Unless waived in advance by the LRIS staff, pre-paid, or touching an area of law for which I will accept the case on a contingency basis, or another firm could be reasonably expected to accept the matter on a contingency basis, I agree to collect from each Client **the sum of \$35 and promptly return said amount to the LRIS with the appropriate Referral Record Form.**

2. **REMIT** to the AABA a referral fee of ten (10) percent on LRIS-referred matters on which I generate fees in excess of \$200. LRIS fee is due within 30 days of receipt by panel member.

3. **PROVIDE** LRIS a copy of the accounting to the client when remitting the surcharge 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

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 card, but that the Service is able to do only limited screening before a referral is made.

Signature of Attorney

Date