



## DuPage County Lawyer Referral & Mediation Service

126 S. County Farm Road • Wheaton, Illinois 60187-4597 • (630) 653-7779 • Fax: (630) 653-7870 A Public Service of the DuPage County Bar Association

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To: Lawyer Referral Service Member

From: Leslie Monahan, Executive Director & Lynn Cavallo, LRS Committee Chair

Welcome to the Lawyer Referral Service, which includes your listing on our [dcb.org](http://dcb.org) Find a Lawyer website as well as our traditional phone service. The Lawyer Referral Service gets almost 9,000 referrals each year and we anticipate this number to grow with our expanded marketing efforts. Please read the enclosed LRS Rules and Regulations to familiarize yourself with the procedures. It is important that you pay special attention to the following:

1. **Consultation:** The LRS member shall not charge for the initial half hour consultation. (See LRS Rules/Regulations 2E).
2. **Referral Service Procedures:** When the client calls the bar office, they are advised that the consultation will be in person or by phone, at the attorney's discretion. They are also told that the attorney has 24 hours to respond, once contact has been made by the client.
3. **Service Fee:** For every referral that results in a lawyer/client relationship, the attorney will pay the LRS service 10% of all fees collected in excess of \$1,000 **within 30 days** of receipt of payment. (See LRS Rules/Regulations 8C).

You must institute a procedure whereby LRS referred clients are flagged and no file is closed without first determining whether or not the percentage fee has been paid to the service.

In order to provide a better service to the public, the DCBA Lawyer Referral and Mediation Service has implemented a screening procedure for prospective members. We are enclosing a questionnaire along with your application. **This questionnaire must be completed by anyone applying for membership in the Referral Service.**

We do not intend to certify or qualify attorneys, our intent is to determine whether an LRS member has enough experience and knowledge in the designated area of law to handle the assigned matter. **(Please make copies and complete a questionnaire for each designated area of law you are applying for)**

Very truly yours,

A handwritten signature in black ink that reads "Leslie Monahan".

Leslie Monahan  
Executive Director

A handwritten signature in black ink that reads "Lynn Cavallo".

Lynn Cavallo  
LRS Committee Chair

**DUPAGE COUNTY BAR ASSOCIATION  
LAWYER REFERRAL SERVICE  
RULES AND REGULATIONS<sup>1</sup>**

1. **EXECUTIVE DIRECTOR:** The Executive Director of the DuPage County Bar Association shall be responsible for the day-to-day operations of The Service.
  
2. **LAWYER REGISTRATION:** Registration is restricted to all persons licensed to practice law by the Supreme Court of Illinois who agree to be bound by the Rules and Regulations of the LRS program.
  - A. The information contained in the lawyer applicant's form shall be as required by the Committee.
  - B. As long as the member continues to be registered, the member shall pay The Service the membership fee prescribed by The Service.
  - C. The member shall abide by all of the rules, regulations, terms and conditions of The Service.
  - D. The member shall be insured for professional liability insurance in the minimal amount of \$100,000 and shall provide The Service with proof of said coverage by delivering a copy of the Insurance policy declaration prior to the member's initial acceptance and *annually thereafter*. Members shall annually advise their professional liability insurance of their membership in The Service, shall supply the Service with a copy of such notice once annually and should obtain from the insurance its agreement to notify the Service of any termination of coverage.
  - E. The Service shall not charge a referral fee. The member shall not charge for the initial half hour conference. Further, the member shall not charge an additional fee for the time expended beyond the initial half hour unless the attorney informs the client when the initial interview is completed and when the regular rates begin and that they are being charged for services which are no longer within the one-half hour initial conference fee.
  - F. The member shall designate as many areas of enumerated "general" fields of law for referrals on his or her application form as desired, as long as the member qualifies and pays the fee. The member may select an unlimited number of subcategories within those general areas. In all situations the member must select only those areas in which he or she has the requisite competence. Among the factors to be considered are: experience, education, certifications, associational memberships and the guidance of senior counsel. The member shall complete the Membership Qualification Questionnaire upon application and thereafter upon request of The Service.
  
3. **ACCEPTANCE OF REGISTRATION OF LAWYER APPLICANT:** The Service may be charged with scrutinizing the areas of referrals of individual members pursuant to the

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<sup>1</sup> Effective 1/1/05.

aforesaid standards. The Service may make any investigation it deems appropriate to determine the eligibility and qualification of each member. The Service may seek to modify those areas of referral of a member through an accord between The Service and that member; or, when warranted, pursuant to the provisions of Paragraph Five. The qualification of any member to the panel for any area of practice shall not be deemed an endorsement of the member. Membership with The Service or any panel thereof may not be used by the member as a basis for claiming certification or expertise in any area of legal practice or endeavor.

4. **WITHDRAWAL FROM MEMBERSHIP:** A member may withdraw from The Service at any time upon written notice to the Chair, Vice Chair or Executive Director of The Service. No refunds will be given for withdrawal from Referral Service. Members who withdraw shall continue to be liable for fees payable to the service as the result of referrals.
5. **DISMISSAL OR MODIFICATION BY THE SERVICE:** By majority vote, the Committee, acting on its own motion, upon complaint of a client applicant, or the request of any member of The Committee, may review and may suspend the eligibility of a member to continue in The Service, or that member's qualification to accept referrals in one or more areas of practice, or may recommend dismissal from The Service of any member for failure to comply with the Rules and Regulations set forth herein. By majority vote, an applicant may be denied membership or a member suspended for good cause shown including, but not limited to the following: 1) Failure to submit reports or funds to The Service within thirty (30) days; 2) Any report, questionnaire or other information provided to The Service is found to be untrue; 3) Failure to comply timely with professional liability insurance requirements; 4) Any violation by the member of the Illinois Supreme Court Code of Professional Responsibility; and 5) Failure to cooperate with The Service or to promptly provide the client applicant with an interview.
6. **CONSIDERATION OF RECOMMENDATION BY BOARD OF DIRECTORS:** The Committee shall notify the member in writing of its recommendation to the Board of Directors for dismissal or modification. Not less than thirty days after written notification of The Committee's recommendation the Board of Directors will consider the Committee's report on that member. The member may appear before the Board and present any matters he/she deems relevant to the Board's consideration. Upon a vote of the majority of Board members present the Board may accept or reject The Committee's recommendation, or the Board may take any other action it deems appropriate under the circumstances.
7. **REFERRAL SERVICE PROCEDURES:**
  - A. **Interview:** Each client applicant shall be first interviewed by The Service. The interview by The Service may take place either at the office of The Service or by telephone.
  - B. **Client Applicant:** Each client applicant shall first communicate with The Service. Whenever a request for an appointment with a lawyer is received by The Service, the interviewer shall determine whether the applicant has a lawyer. If the client applicant has a lawyer, the interviewer shall refer the client applicant to that lawyer. If the client applicant states that he or she does not wish to discharge his or her attorney, the client applicant shall be advised that he or she cannot be referred to another lawyer until the prior lawyer-client relationship has been terminated.

- C. Interview by The Service: The interviewer will determine whether the client applicant has a matter appropriate for referral if the interviewer determines that the client applicant meets the requirements of The Service, the client applicant shall be referred to a member in accordance with the rules established by The Service.
- D. Client Applicant Information: During the interview by the interviewer, client applicant shall be informed of The Service's rules and regulations. This shall include information about the purpose of the first referral consultation, the length of time deemed appropriate for the consultation, and other information deemed necessary by The Service.
- E. Consultation Fee: Interviewer will advise client applicant that there is no referral fee, and there is no fee for the initial half hour consultation.
- F. Time and Place of Consultation: The Service shall furnish the name, address and telephone number of the referral member. The client applicant will be encouraged to call the member promptly to arrange for a conference. Geographic location shall be taken into consideration in order to avoid excessive travel by the client applicant.
- G. Referral Lawyer: If other matters than those contemplated in the interview develop during the consultation with the referral member, the member may make such arrangements for handling these matters as may be appropriate and agreeable with the client applicant. Any such work shall be considered additional legal work not covered by the referral. The referral member may also make such arrangements with the client applicant for the performance of future legal services as are consistent with recognized principles of legal ethics.
- H. Secondary Referrals: If the referral member is unable to provide the initial interview or the subject matter of the interview is not in the member's referral area, or because the member finds a conflict of interest, or any other reason, the referral member shall refer the client back to the Service.
- I. Referral Lawyer Designee: The referral member shall be the Lawyer to which the client applicant is referred except in cases where there are other lawyers available at the firm office, who are members of The Service and designated himself or herself, to practice in the area of the referral, and with the written acquiescence of the client applicant, other members of the firm may interview and handle a part or all of the legal matter.
- J. Follow Up: The Service shall review the operation of The Service in a reasonable number of cases in order to improve the quality of The Service.

8. **LEGAL FEES:**

- A. Fees Charged: The Service shall not charge a referral fee. There is no fee for the initial half hour consultation. It is acceptable for the referral member to screen and decline the client and refer him/her back to LRS. The member shall not charge an additional fee for the time expended beyond the initial half hour unless the attorney

informs the client when the initial interview is completed and when the regular rates begin and that they are being charged for services which are no longer within the one-half hour initial conference.

- B. Compensation for Further Services: Compensation for further services may be fixed by agreement between the lawyer and Client applicant in keeping with the spirit of The Service and the canons of professional ethics
- C. Percentage Fees: Any attorney fees actually collected, whether hourly, contingency, flat or fixed, for cases from LRS-referred clients in excess of \$1,000.00, shall be required to pay LRS 10% of all fees collected in excess of \$1,000.00 within 30 days of receipt. No fee is due to LRS where resulting attorney fees collected are \$1,000.00 or less. However, LRS should be notified of the resolution of the case. For example, if an attorney collects a fee in the amount of \$2,100, s/he shall pay The Service the fee of \$110 [(\$2,100 - \$1,000) x 10%].
- D. Reporting Responsibility: If attorney fees from LRS-referred clients are contingency, flat or fixed, members have the responsibility to report fees actually earned and collected thirty (30) days from entry of the fee agreement with the client, then thirty (30) days from collection of any fee. If attorney fees from LRS-referred clients are hourly, members have the responsibility to report fees actually earned and collected every ninety (90) days.

9. **FEES FOR PARTICIPATING MEMBERSHIP:**

- A. Application For Membership: Application for membership shall be submitted along with payment of the membership fee. Dues amount will be prorated for membership application submitted in February through November.
- B. Annual Membership Fee: Each participating member who is a member of the DuPage County Bar Association shall pay The Service annually the sum of One hundred eighty (\$180) dollars for the first general category. Non-DCBA members shall pay The Service annually the sum of Three hundred (\$300) dollars for the first general category. There will be an additional charge of sixty (\$60) dollars for each additional general category.



DUPAGE COUNTY BAR ASSOCIATION
LAWYER REFERRAL SERVICE

126 S. County Farm Rd., Wheaton, IL 60187 Tel: (630) 653-7779, Fax: (630) 653-7870
Web Site http://www.dcba.org - email address: bar@dcba.org



Application by individual membership only

NAME: \_\_\_\_\_ FIRM NAME: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

DUPAGE CONTACT ADDRESS: \_\_\_\_\_

PHONE: (\_\_\_\_) \_\_\_\_\_ FAX: (\_\_\_\_) \_\_\_\_\_

EMERGENCY/CELL PHONE (We will not give out.): (\_\_\_\_) \_\_\_\_\_

Email \_\_\_\_\_ ARDC#: \_\_\_\_\_

Publish Email Address? \_\_\_ Yes \_\_\_ No Use Email address for Online referral Notice \_\_\_ Yes \_\_\_ No

Firm Website Address: http://\_\_\_\_\_

Date Admitted to: Practice law in Illinois \_\_\_\_\_ DCBA Membership \_\_\_\_\_

Referrals will be sent to you by fax or email.

Please check languages spoken in addition to English on attached category listings.

I will take payments: Yes \_\_\_ No \_\_\_ Evening/Weekend Hours by Appointment: Yes \_\_\_ No \_\_\_

The By-Laws require that the attorney maintain malpractice insurance in full force and effect. PLEASE SUBMIT A COPY OF THE FACE PAGE OF YOUR POLICY WITH THIS APPLICATION and annually as your policy renews. The BASE annual dues are \$180.00 for DCBA Members/\$300.00 for Non-Members, payable the first of January each year. See Reverse side for dues schedule for DCBA Members, Non-Members and prorated dues for mid-year applicants.

The Lawyer Referral Service rules and regulations state that membership in the LRS is dependent on the attorney member maintaining:
a. good standing with the ARDC;
b. malpractice insurance in full force and effect.

I have experience in handling cases in the following areas of law in which I am interested in accepting referrals. By signing below, I (A) certify that my practice includes the areas marked below; (B) The areas marked are consistent with representations in my malpractice insurance; (C) agree to be bound by the rules and regulations of the Lawyer Referral Service.

Signature \_\_\_\_\_ Date \_\_\_\_\_

For Office Use Only:
Dues Posted \_\_\_\_\_ Categories Input \_\_\_\_\_
Malpractice Ins. \_\_\_\_\_ LRS Email \_\_\_\_\_
LRS Member List \_\_\_\_\_ Language \_\_\_\_\_
LRS Committee Review:
By: \_\_\_\_\_

Revised 11/11

Dues enclosed \$ \_\_\_\_\_ Check # \_\_\_\_\_
or Charge my Credit Card:

# \_\_\_\_\_

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

**Membership Dues for the Lawyer Referral Service are Prorated as Follows:**

If you join in the following months, **DCBA Members Pay:**

	First/Base Category*	Two Categories*	Three Categories*	Four Categories*	Each Additional Category* Add
January	\$180.00	\$240.00	\$300.00	\$360.00	\$60.00
February	165.00	220.00	275.00	330.00	55.00
March	150.00	200.00	250.00	300.00	50.00
April	135.00	180.00	225.00	270.00	45.00
May	120.00	160.00	200.00	240.00	40.00
June	105.00	140.00	175.00	210.00	35.00
July	90.00	120.00	150.00	180.00	30.00
August	75.00	100.00	125.00	150.00	25.00
September	60.00	80.00	100.00	120.00	20.00
October	45.00	60.00	75.00	90.00	15.00
November		(Full			
December		Amount - See January Fees)			

If you join in the following months, **DCBA Non-Members Pay:**

	First/Base Category*	Two Categories*	Three Categories*	Four Categories*	Each Additional Category* Add
January	\$300.00	\$360.00	\$420.00	\$480.00	\$60.00
February	275.00	330.00	385.00	440.00	55.00
March	250.00	300.00	350.00	400.00	50.00
April	225.00	270.00	315.00	360.00	45.00
May	200.00	240.00	280.00	320.00	40.00
June	175.00	210.00	245.00	280.00	35.00
July	150.00	180.00	210.00	240.00	30.00
August	125.00	150.00	175.00	200.00	25.00
September	100.00	120.00	140.00	160.00	20.00
October	75.00	90.00	105.00	120.00	15.00
November		(Full			
December		Amount-See January Amounts)			

\_\_\_\_ Please send an application for DCBA membership. If I join the DCBA, I understand that the difference in member and non-member LRS dues rates will be applied to my DCBA dues.

\*“Category” refers to the General Area of law as indicated on the attached list in **bold**. Membership in each category allows the member to choose **as many of the subcategories as apply**, subject to demonstration of knowledge/expertise in each area as determined by the LRS committee review of your application. Language selections are not included in the category count for dues purposes. From time to time, the service will solicit membership in law categories where there is a need for representation at a reduced or no fee basis.

Please mark all areas of law (**indicated by bold print**) and note any specialty fields you wish to be included on the referral service (subject to approval by the LRS Committee). Please return this form **along with your dues payment and one completed "LRS Questionnaire" for each general category of law indicated** to the DCBA. Your LRS Membership also includes listings on the DCBA website Find A Lawyer Referral service in each of the categories indicated.

**Administrative Law/Local Govt.**

- Atty Reg. & Disc. Comm..
- Forest Preserve/Park Districts
- Police & Fire Commission
- Professional Review Board
- Sec/State Admin. Hearings
- Toll Authority Hearings
- Zoning and Annexation

**Animal Law**

- Animal Trusts
- Equine Contracts
- Veterinary Malpractice

**Appeals**

- Civil (State)
- Criminal (State)
- Civil (Federal)
- Criminal (Federal)

**Bankruptcy/Credit**

- Chapter 7
- Chapter 11
- Chapter 13
- Credit Problems
- Creditor Rights
- Debtor Rights
- Litigation

**Business Law**

- Acquisitions & Mergers
- Anti-Trust
- Banking Law
- Blue Sky Laws
- Business Dispute Resolution
- Commercial Leases
- Contracts Law
- Corporation
- Franchise Law
- Futures Regulation Compliance
- Initial Public Offerings
- International
- Investment Advisor-Broker
- Investor Suits
- Litigation
- LLC
- New Business Start-up
- Not For Profit
- Partnerships
- Purchase/Sale of Business
- Securities
- Shareholder Rights
- Stock Option Plans
- Telecommunications
- Other Transactions

**Civil Rights**

- Abuse of Power
- Americans w/ Disabilities Act
- False Imprisonment
- HIPAA
- Human Rights

**Collection Law**

- Accounts Receivable
- LM (\$5000 & up)
- Small Claims
- Judgment Appeals

**Consumer Protection**

- Class Action
- Consumer Protection
- Credit Problems
- Identity Theft
- Internet Transactions
- Lemon Law
- Repossessions
- Warranty Law

**Contract Law**

- Construction
- Transportation

**Criminal Law**

- Domestic Battery
- DUI
- Expungement (Felony)
- Expungement (Misdemeanor)
- Felony
- Juvenile
- Misdemeanor
- Property Seizures
- Restraining Orders
- Traffic
- Other

**Elder Law/Care**

- Guardianship
- Health & Hospital
- Medicaid
- Medicare
- Power of Attorney
- Public Aid
- Other

**Election Law**

**Employment**

- Americans w/ Disabilities Act
- Benefits/Pensions
- Contracts
- Discrimination
- Downsizing/Mergers
- Employee Handbooks
- ERISA
- Harassment
- Labor Relations (non union)
- Litigation
- Mediation
- New Hire Contracts
- Non-Compete Clauses
- Termination/Severance
- Unemployment Compensation
- Wage Claims
- Wrongful Discharge
- Other

**Entertainment/Sports Law**

**Environmental Law**

**Estates, Trusts, Wills**

- Contested Estates
- Estate Planning
- Guardianship
- Litigation
- Living Wills
- Powers of Attorney
- Probate
- Simple Wills
- Trusts
- Trust Administration
- Wills
- Other

**Family Law**

- Adoption
- Child Support Enforcement
- Custody
- DCFS Appeals
- Dissolution
- Domestic Violence
- Grandparent Rights
- Juvenile
- Litigation
- Order of Protection
- Paternity
- Post Decree
- Pre-nuptial Agreements
- Property Division
- Surrogacy Contracts
- Other

**Federal Court Litigation**

- Civil
- Criminal

**Government Benefits**

- Educational Benefits
- FERS-Fedl Empl.Retirmt Sys.
- Gov't Housing
- Ill. Public Aid
- IMRF-Ill. Mun. Retirmt Fund
- Litigation
- Medicare
- Social Security-Disability
- Social Security-Retirement
- Social Security-Survivor

**Benefits**

- Unemployment Compensation
- Veterans' Benefits
- Victims Compensation

 **Immigration****Insurance Law**

- Automobile
- Benefits
- Casualty
- Health
- Insurance Defense
- Life
- Policy Coverage
- Property
- Subrogation
- Other

**Intellectual Property**

- Appeals
- Computer/Licensing Agreements
- Copyright/Trademark
- Internet Law
- Litigation
- Patents
- Trade Secrets
- Other

 **Liquor Licensing & Regulation** **Mental Health** **Military Law****Personal Injury**

- Auto Accidents
- Class Action
- Defendant Representation
- Libel/Slander
- Malicious Prosecution
- Malpractice-Med/Dental
- Malpractice-Legal
- Malpractice-Other
- Negligence
- Plaintiff Representation
- Premises Liability
- Product Liability
- Structural Work Act
- Subrogation
- Wrongful Death
- Other

**Real Estate**

- Annexation
- Commercial
- Condemnation/Em. Domain
- Condominium
- Construction Law
- Contaminated Property
- Homeowner Associations
- Land Use Transactions
- Landlord/Tenant
- Litigation
- Mechanics Liens
- Mortgage Foreclosure
- Real Estate Assessments
- Residential
- Tax Sale Property
- Title Work
- Zoning
- Other

**School Law**

- Discrimination
- Residency
- School Law
- Special Education
- Student Disciplinary Hearing
- Title IX
- Other

**Social Security** (see Govt Benefits)**Tax Law**

- Audits
- Estate Tax Returns
- Illinois Dept/Revenue
- IRS
- Litigation

**Workers Compensation**

- Fed. Employees Liab. Act
- General
- Longshore
- Railroad

 **Other**

Specify Area(s) of Law  
(New categories will be considered for inclusion.)

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**Mediation** (Special Requirements/Fees)

- Civil
- Employment
- Family
- Real Estate

**Languages** ( Please check only if you or a permanent member of your staff speaks fluently. )

- Chinese
  - Filipino
  - French
  - German
  - Greek
  - Italian
  - Japanese
  - Korean
  - Polish
  - Russian
  - Spanish
  - Vietnamese
  - Sign Language
  - Other Language (please list)
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See Next page for Modest Means Program information.

# Modest Means Program

In February 2006, the DCBA Board of Directors approved a Modest Means Pilot Program, which has since been expanded to include additional categories of law. The MMP is limited to:

1. Bankruptcy (Medical Debt)
2. Criminal (Misdemeanor)
3. Estate, Trust and Wills
4. Family Law
5. Guardianship
6. Mortgage Foreclosure and Small Claims (over \$5000)

Under the rules of the MMP, you are to reduce your attorney's fees in some manner (i.e. reduced retainer, no retainer or reduced hourly fee as outlined in the attached correspondence). As a result of agreeing to be a part of the MMP, the DuPage County Bar Association (DCBA) will not receive any fees from revenue generated from a Modest Means client. This is not a Pro Bono assignment and does not count towards your yearly obligation with the DuPage Bar Legal Aid Service. If at any time, the MMP attorney finds the client income/assets to be above MMP guidelines, the MMP attorney may adjust their billing rate accordingly. Upon completion of the file, the MMP attorney is required to provide a final disposition of the referred matter to the DCBA.

Yes sign me up for the Modest Means Program under the following category/s (check categories that apply – you must already be included in the general area of law on the Referral Service.)

- Bankruptcy (Medical Debt)
- Criminal (Misdemeanor)
- Estate, Trust and Wills
- Family Law
- Guardianship
- Mortgage Foreclosure and Small Claims (over \$5000)

I do not wish to participate in the Modest Means Program at this time.

# L.R.S. Questionnaire

(Make additional copies for each area of law requested)

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

Area of Law: \_\_\_\_\_

This area is what percent of practice? : \_\_\_\_\_

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

Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Business Website: \_\_\_\_\_

Year Admitted to Practice Law: \_\_\_\_\_ Year of DCBA Membership: \_\_\_\_\_

FOR THE DESIGNATED AREA OF LAW (must have handled a minimum of 5 matters in the designated area of law or the equivalent thereof):

1. In the last 12 months, how many clients have you represented in matters involving the designated area of law?
2. How many matters have you handled in the designated area of law in the last 5 years?
3. Have any of these matters involved protracted litigation or complex issues? If so, please explain.
4. List cases that you tried to final judgment in the last 5 years in the designated area of law. How many of these were jury trials?
5. List membership in professional societies, groups or committees of a bar association within the designated area of law.
6. List seminars attended or continuing legal education received, in the designated area of law, within the last 5 years.
7. List any awards received, publication written, or seminars presented in the area of designated law.
8. Are you a mentor, or requesting attorney in the DCBA Mentor Program?\_