

# MEMBERSHIP APPLICATION

Completed form can be submitted to jguckenberg@milwbar.org, or mail form and payment to 747 North Broadway, Milwaukee, WI 53202

### **CONTACT INFORMATION** Please print.

Title	itle First Name		Middle Initial	Last Name			
Firm Name							
Address - Is your loo	cation AE	A accessible Y	es No			Suite	
City				State	Zip		
Phone				Email			
PROFESSIONAL INFORMATION							
Year Licensed In Wisconsin Licensed in Other States & Year Licensed							
Foreign Languages Spoken							
Do you offer limited scope representation? Yes No Do you handle civil appellate matters? Yes No							
Are you admitted to	Are you admitted to practice in federal Court? Yes No						
Dues include 3 Panels (with subpanels), all Modest Means panels, and other marked panels. Additional fees for more panels as described below:							
Membership Dues: MBA Members \$150 Non-Members \$350							
Additional Panels:       1-2: add \$50       3-4: add \$100       5+: add \$150							
Payment info.:	Payment info.: Check Enclosed Credit Card						
			Card No.		Exp. D	ate CV	$\sim$

### **RULES GOVERNING PANEL MEMBERSHIP**

#### Section I. Purpose

These rules govern the operation of the Lawyer Referral and Information Service (LRIS) sponsored by the Milwaukee Bar Association, Inc. (MBA). The purpose is to provide a benefit to the members, as well as a service to the community in selecting the appropriate resource for assistance with legal problems. Often people do not know where to turn for legal service and this referral service plan assists the public in readily obtaining legal advice and service from an attorney.

#### Section II. Governance

LRIS will be operated under the general supervision of the Lawyer Referral and Information Service Committee (Committee) of the MBA, which shall have the authority to adopt and implement policies consistent with these Rules. Day to day operations shall be under the direct supervision of the Director of LRIS and the general supervision of the Executive Director of the MBA. Amendment of the Rules requires approval of the Board of Directors of the MBA submitted in writing.

#### Section III. Conditions of Panel Membership

1. Attorneys must be in good standing and licensed to practice law in the State of Wisconsin to be eligible to serve on the referral panel. A member is obligated to immediately notify the LRIS (in writing?) if the member

has a formal complaint with the Supreme Court or the equivalent thereof in any jurisdiction. A member will also notify the LRIS if they receive a notice of suspension of their law license in any jurisdiction, or if there are any restrictions on their license through the Office of Lawyer Regulation (or similar office in other jurisdictions) in any jurisdiction in which they practice. In the event that any of these situations apply, the Committee will act as they see fit, which may include temporary suspension (for a length of time to be determined by the Committee) or permanent removal from the panel.

2. A member must inform the LRIS staff if they are charged with a felony offense. In the event that this results in a conviction, the Committee will act as they see fit, which may include temporary suspension or permanent removal from the panel. The member will have the option to voluntarily opt out of their LRIS membership. If they choose to do this, the member will continue to be responsible for reporting on any outstanding or ongoing matters referred by the LRIS. If the member chooses not to opt out, the committee will meet to discuss and draft a recommendation for the MBA Board of Directors to review regarding the member's LRIS membership and referral status.

## RULES GOVERNING PANEL MEMBERSHIP (continued)

3. Panel members must be presently engaged in the private practice of law.

4. All panel attorneys must carry professional liability insurance, at least to the minimum offering under the Wisconsin State Bar sponsored program and must agree to maintain such coverage during the entirety of their LRIS membership. The attorney must immediately report in writing to the LRIS about the lapse, expiration termination, or replacement of said insurance. All panel attorneys will agree to provide a current declarations page. Failure to submit proof of current professional liability insurance will result in immediate suspension from the service. Panel attorneys will be reinstated as soon as the MBA LRIS receives current proof of insurance.

5. Panel members may elect to accept referrals only in fields of law in which they consider themselves competent, or must have the active and ongoing supervision of an attorney experienced in such areas, consistent with Wisconsin Supreme Court Rules 20:7.1, 20:7.4, and within the registration fee guidelines outlined below in Section IV.1 of these Rules.

6. The charge for the initial thirty (30) minute consultation shall be no more than twenty (20) dollars. If the attorney is retained to provide further services, the panel member shall advise the potential client how he/she charges for additional professional services. This will be determined prior to providing such further services.

7. Panel members agree in advance to the submission of any fee dispute with a referral client relating to the initial referral only to binding arbitration by the MBA Fee Arbitration Committee, if the client consents to such arbitration.

8. Consistent with Supreme Court Rule 20:6.1 and 20:6.2, panel members are encouraged to enter into reduced fee arrangements when a referral client's resources may require.

9. Referrals to panel members shall be made on an impartial rotation basis. However, other factors maybe considered when appropriate or when requested by the client such as geographic location ,languages spoken, demographic information or other specific requests that pertain to the individual's representation.

10. Failure to report on referred cases within thirty (30) days of the date of referral may result in suspension from the referral rotation until full compliance has been achieved.

11. Failure to return all fees owed to the LRIS within thirty (30) days of date of referral may result in immediate suspension from the panel, with full responsibility for all fees owed, as well as reporting to the Office of Lawyer Regulation or other action if deemed necessary by the Committee.

12. Failure to update insurance forms as stated in Section 111, Rule 3 will result in immediate suspension from the panel until current forms are submitted.

13. Failure to provide case status updates in a timely fashion may result in immediate suspension from the panel until outstanding matters are updated.

14. If for any reason the designated attorney is not retained, the members shall refer the client back to the LRIS.

15. Panel members may not transfer a referral to any attorney who is not a member of LRIS. If the assigned attorney is unable to assist the caller, the member shall refer the client back to the LRIS. To best assist the client, rare exceptions to this rule may be made. 16. If the referred LRIS attorney is representing a client and in the course of representation would like to bring in co-counsel who is not an LRIS member, that co-counsel would need to join the service. Co-counsel will pay membership dues and complete all requisite paperwork for LRIS membership. All referral fees and LRIS obligations apply to co-counsel as well as the original referred attorney.

17. Mediators are required to have a minimum of 30 hours mediator training before listing as a mediator on the LRIS Panel. Early Neutral Evaluators must have substantial experience in the substantive area identified.

18. A member will continue to report and pay referral fees on any matter that pertains to the original case subject matter requested by the client. Any matter that contains the same issue and same fact patterns will be considered part of the original referral. This includes appellate work that is a continuation of the issue for which the referral was originally sent.

19. MBA Membership of LRIS Panel Attorneys will be handled in compliance with Rule IV of the American Bar Association's Model Supreme Court Rules Governing Lawyer Referral & Information Services.

20. Attorneys wishing to receive referrals for any Modest Means panel will agree to charge no more than \$1000 for an initial retainer fee, and will charge no more than \$100 per hour. Modest Means referrals will be offered at the discretion of the LRIS Coordinator or other qualified MBA staff. If a potential client receives government financial assistance of any form (Food Share, Badger Care, etc.) the client will be offered a Modest Means referral upon request.

21. For LRIS Experience Panel requirements, see attached Experience Panel Registration form.

22. LRIS attorneys will not discriminate against potential clients on the basis of their membership in any federally protected class including but not limited to race, origin, ethnicity, gender identity, and sexual orientation. Failure to comply may result in being removed from the panel.

23. If for any reason a member is removed from the panel at the decision of the Committee, the member will not be entitled to a refund of membership fees. The member will continue to be responsible to report and pay referral fees on any remaining matters where the member was hired through the LRIS.

#### Section IV. Payment of Registration and Referral Fees

1. LRIS Members shall pay an annual registration of \$150 or \$350 for non-MBA members (unless special circumstances apply) for which fee members may register to receive referrals in three (3) of the substantive fields of law (See attached Panel Selection form). For an additional fee, attorneys may receive referrals for additional panels. To allow for broader access to justice, LRIS will offer certain panels added for free including all Modest Means panels. These free panels are marked on the Panel Selection list (pages 3-4 of this application). Registrations are valid for the calendar year, January 1 to December

2. Members may be asked to present their experience to the LRIS Committee.

3. On any referral that generates an attorney's fee of \$200 or more, regardless of the area of law in which the referral is made, the member agrees to remit ten percent (10%) of such fee to the MBA within thirty (30) days from date of receipt of payment.

For cases that yield fees in excess of \$10,000, the referral fee is 10% of the first \$10,000 in fees and 15% of any fees beyond the first \$10,000.

# RULES GOVERNING PANEL MEMBERSHIP (continued)

*Example 1:* \$20,000 contingency fee paid to the attorney. The first \$10,000 remits 10%, totaling \$1,000. The remaining \$10,000, remits 15%, totaling \$1,500. The total amount to remit to the LRIS in trust for a \$20,000 case is \$2,500.

**Example 2:** \$8,000 initial retainer fee paid for a criminal defense case. Before the trial, an additional \$6,000 is charged, totaling \$14,000 in fees. After final payment is received and the case is closed, the first \$10,000 remits 10%, totaling \$1,000. The remaining \$4,000 remits 15%, totaling \$600. The total amount to remit to the LRIS in trust for a \$14,000 case is \$1,600.

4. Members shall provide each potential client, as a result of an LRIS referral, a consultation. Members agree to charge no more than \$20 for the first half-hour of this consultation. Members may waive this fee for any cases they choose. All other fees shall be negotiated between the client and the attorney.

5. Any attorney not renewing annual LRIS membership is responsible to provide ongoing and updated case status information and referral fees on all cases referred to the attorney while his/her membership was active.

#### Section V. Enforcement

If in the Committee's opinion, there is reasonable cause to believe a Panel member has violated these Rules or policies of Panel membership, the Committee may bring the matter up to the Board of Directors of the MBA.. Disputes regarding referral fees that may be due the MBA, if not resolved between the attorney and the LRIS Committee, shall be resolved through arbitration by the Fee Arbitration Committee of the MBA. Unpaid referral fees owed to the MBA shall accrue interest at the rate of 12% per annum until paid. The decision of the Fee Arbitration Committee shall be binding upon both parties. Repeated violation of any conditions of Panel membership may result in removal from the Panel. LRIS also retains the right to contact the Office of Lawyer Regulation at any time to determine if there have been any prior suspensions or revocations of the attorney's license. In the event that there has been, the Committee will decide whether or not that attorney is eligible to participate on the panel. No LRIS panel attorney has the right to use the LRIS name or logo without prior permission from the Committee, and should this be violated, the Committee will determine what repercussions are appropriate.

#### **Attorney Agreement**

I am licensed to practice law in Wisconsin and am a member in good standing. I have read and agree to be bound by the LRIS Rules Governing Panel Membership which are incorporated herein by reference. I represent that I am competent to handle referrals in the categories I have marked.



Signature:

Date:

# PANEL SELECTION

#### MM= Modest Means, P= Plaintiff, D= Defendant

Please select all of the subpanels below for which you would like to receive referrals. Subpanels with an asterisk (\*) require a certain amount of experience. For each selection marked with an asterisk (\*), you will need to you will need to complete the attached Experience Panel Registration form.

BENEFITS & ADMINISTRATIVE (free panel included w/dues)	мм	D	D		ММ	F
Federal Government				*Personal Bankruptcy (Debtor)		
nvoluntary Commitment				Business Bankruptcy (Creditor)		
Municipal or Local Government				*Business Bankruptcy (Debtor)		
Professional Licensing				Business Mediation		
Driver's Licenses				Car Repair / Lemon Law		
Commercial drivers license / CDL				Collection Practices & Creditor Harassment		
Social Security (Not SSDI or SSI)				Credit Reports		
Social Security Disability Insurance (SSDI)				Debt Collections (Creditor)		
State Government				Debt Collections (Debtor)		
Supplemental Security Income (SSI)				Foreclosure		
Social Security SSI / SSD - Child				Funeral Home Negligence		
Jnemployment				Identity Theft		
Jtilities				Predatory Lending Practices		
Veterans Benefits	. Ц			Small Claims Court		
Norkers' Compensation (Federal Employee)	. Ц			Unfair & Deceptive Sales & Practices		
Norkers' Compensation (Private Employee)	. Ц			Utilities		
Norkers' Compensation (Private Employer)	. 🖂			Class Action		
Norkers' Compensation (State Employee)				Banking		
Medicaid - Elderly, Blind, Disabled	. 🔲			HOUSING & APARTMENT (free panel included w/dues)		
Medicare				Home Construction / Improvement		
Badger Care Plus - State Health Care				Housing Discrimination		
Federal Health Insurance Subsidy (ACA / Obama Care)				Landlord Representation		
_ong Term Care Facilities				Mortgage Foreclosures (Not Predatory Lending)		
Community Waivers				Predatory Mortgage Lending Practices		
Energy Assistance				Tenant Representation		
Emergency Assistance - W2				Public and Subsidized Housing		
				_		
FoodShare - Food Stamps				Panels shaded in yellow are included with base LF		
FoodShare - Food Stamps Nisconsin Shares - Child Care Subsidy				Panels shaded in yellow are included with base LF registration fees.	ris	
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FoodShare - Food Stamps Wisconsin Shares - Child Care Subsidy W2 Welfare BUSINESS	MM	P	D	Panels shaded in yellow are included with base LF registration fees. CRIMINAL (cont.) Municipal Ticket	ris MM	F
FoodShare - Food Stamps Misconsin Shares - Child Care Subsidy W2 Welfare BUSINESS Antitrust Litigation		P	D	Panels shaded in yellow are included with base LF registration fees. CRIMINAL (cont.)	ris MM	F
FoodShare - Food Stamps Wisconsin Shares - Child Care Subsidy W2 Welfare BUSINESS Antitrust Litigation Business Dissolution.		P	D	Panels shaded in yellow are included with base LF registration fees. CRIMINAL (cont.) Municipal Ticket	R/S MM	F
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FoodShare - Food Stamps         Wisconsin Shares - Child Care Subsidy         W2 Welfare         BUSINESS         Antitrust Litigation         Business Dissolution         Business Formation         Business Litigation or Dispute         Buy-Sell Agreements         Compliance         Contracts         Franchise Agreements or Purchase of Franchises         Non-Profit Formation         Dnline Business Law				Panels shaded in yellow are included with base LF registration fees.         CRIMINAL (cont.)         Municipal Ticket.         Property Forfeiture.         Post Conviction Work – Sentence Modification.         Traffic.         Correction or Expungement of Criminal Records         Victim Rights         Conceal & Carry Laws         Restraining Orders.         EMPLOYMENT         Civil Service.         Disciplinary Hearing		
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FoodShare - Food Stamps         Wisconsin Shares - Child Care Subsidy         W2 Welfare         BUSINESS         Antitrust Litigation         Business Dissolution         Business Formation         Business Formation         Business Litigation or Dispute         Buy-Sell Agreements         Compliance         Contracts         Franchise Agreements or Purchase of Franchises         Non-Profit Formation         Donline Business Law         Partnership Agreements         Securities         Frade Regulation         CRIMINAL         Appeals         Driminal Record				Panels shaded in yellow are included with base LF registration fees.         CRIMINAL (cont.)         Municipal Ticket.         Property Forfeiture         Post Conviction Work – Sentence Modification.         Traffic.         Correction or Expungement of Criminal Records         Victim Rights         Conceal & Carry Laws         Restraining Orders.         EMPLOYMENT         Civil Service.         Disciplinary Hearing         Employee Benefits.         Employer Representation.         Employment Contracts         Employment Discrimination.         Medical Leave         Non-Compete / Non-Disclosure Agreements.         Safe Working Conditions		
FoodShare - Food Stamps         Wisconsin Shares - Child Care Subsidy         W2 Welfare         BUSINESS         Antitrust Litigation         Business Dissolution         Business Formation         Business Formation         Buy-Sell Agreements         Compliance         Contracts         Franchise Agreements or Purchase of Franchises         Non-Profit Formation         Donline Business Law         Partnership Agreements         Securities         Trade Regulation         Criminal Record         DWI         Federal Criminal Defense				Panels shaded in yellow are included with base LF registration fees.         CRIMINAL (cont.)         Municipal Ticket.         Property Forfeiture.         Post Conviction Work – Sentence Modification         Traffic.         Correction or Expungement of Criminal Records         Victim Rights         Conceal & Carry Laws         Restraining Orders.         EMPLOYMENT         Civil Service.         Disciplinary Hearing         Employee Benefits.         Employer Representation         Employment Contracts         Employment Discrimination.         Medical Leave         Non-Compete / Non-Disclosure Agreements.         Safe Working Conditions         Separation Agreement		
FoodShare - Food Stamps         Wisconsin Shares - Child Care Subsidy         W2 Welfare         BUSINESS         Antitrust Litigation         Business Dissolution         Business Formation         Business Formation         Business Litigation or Dispute         Buy-Sell Agreements         Compliance         Contracts         Franchise Agreements or Purchase of Franchises         Non-Profit Formation         Donline Business Law         Partnership Agreements         Securities         Trade Regulation         Criminal Record         DWI         Federal Criminal Defense         Felony (Non-Homicide)				Panels shaded in yellow are included with base LF registration fees.         CRIMINAL (cont.)         Municipal Ticket.         Property Forfeiture         Post Conviction Work – Sentence Modification         Traffic.         Correction or Expungement of Criminal Records         Victim Rights         Conceal & Carry Laws         Restraining Orders         EMPLOYMENT         Civil Service         Disciplinary Hearing         Employee Benefits         Employee Representation         Employment Contracts         Employment Discrimination         Medical Leave         Non-Compete / Non-Disclosure Agreements         Safe Working Conditions         Separation Agreement		
FoodShare - Food Stamps         Wisconsin Shares - Child Care Subsidy         W2 Welfare         BUSINESS         Antitrust Litigation         Business Dissolution         Business Formation         Business Formation         Business Litigation or Dispute         Buy-Sell Agreements         Compliance         Contracts         Franchise Agreements or Purchase of Franchises         Non-Profit Formation         Donline Business Law         Partnership Agreements         Securities         Frade Regulation         CRIMINAL         Appeals         Driminal Record         DWI         Felony (Non-Homicide)         Homicide         Juvenile Delinquency				Panels shaded in yellow are included with base LF registration fees.         CRIMINAL (cont.)         Municipal Ticket.         Property Forfeiture         Post Conviction Work – Sentence Modification         Traffic.         Correction or Expungement of Criminal Records         Victim Rights         Conceal & Carry Laws         Restraining Orders.         EMPLOYMENT         Civil Service         Disciplinary Hearing         Employee pension issues         Employee Benefits         Employment Contracts         Employment Discrimination         Medical Leave         Non-Compete / Non-Disclosure Agreements         Safe Working Conditions         Separation Agreement         Sexual Harassment         Wage & Labor Standards		
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# PANEL SELECTION (continued)

EDUCATION	мм	Б	D
Access (Including Bilingual & Testing)			
Discipline (Including Expulsion & Suspension)			
Higher Education			
Private school			
Special Education & Learning Disabilities			
Teachers & Other Educational Professionals			
ENTERTAINMENT	мм	Р	D
Artists			
Film, Television & Theater			
Music			
FAMILY	мм	Р	D
Adoption			
Appeals			
Annulment			
Child Abuse & Neglect			
Child Support			
Custody			
Divorce (Complex / Contested)			
Divorce (Simple / Uncontested)			
Divorce Modifications			
Domestic Violence (Petitioner)	. 🛄		
Domestic Violence (Respondent)	. 🛄		
Emancipation	. Ц		
Family Mediation	. 🖂		
Guardianship			
Interstate / International			
Marital Support			
Name Change			
Parental Rights Termination			
Paternity			
Post-Nuptial Agreement			
Pre-Nuptial Agreement	• 🛏		
Separation			
Physical Placement / Visitation			
Grandparent Rights Military Divorce			
		_	_
	ММ	P	D
Asylum			
Consular Practice			
Criminal Issues			
Dual Citizenship Employer Sanctions			
Employer Salicions Employment-Based Immigration			
Employer Visa Assistance for Incoming Employees			
Family-Based Immigration			
Investors			
Naturalization			
Removal Defense			
INSURANCE	мм	Р	D
Automobile / Property Insurance			
Business Insurance Dispute			
Employer-Provided Insurance			
(Disability, Health, Life & Accident)			
Health Insurance			
Homeowner Insurance			
Life Insurance			

INTELLECTUAL PROPERTY	<mark>мм</mark>	Ρ	D
*Copyrights			
*Patents			
*Trademarks			
Entertainment Law			
PERSONAL INJURY & RIGHTS VIOLATIONS Assault & Battery	MM	Ρ	D
Auto Collision			
Auto Collision (No Injuries)			
Civil Rights			
Dental Malpractice			
Discrimination			
False Arrest / False Imprisonment			
Jail Injuries			
Jail / Prisoner Rights (No Injuries)			
*Legal Malpractice			
Libel, Slander or Harassment			
*Medical Malpractice			
Police Misconduct			
Product Liability			
Property Damage			
Slip & Fall			
Toxic Tort			
Wrongful Death or Massive Injuries			
HIPAA Violation			
Motorcycle Accident			
REAL ESTATE	MM	Ρ	D
Commercial Real Estate Litigation			
Commercial Real Estate Transactions			
Condemnation, Eminent Domain & Annexation			
Land Use & Zoning			
Natural Resources			
Neighbor Disputes			
Neighborhood, Coop & Condominium Associations			
Residential Real Estate Litigation			
Residential Real Estate Transactions			
Liens			
Property Tax			
Time Share Issues			
ТАХ	MM	Ρ	D
Business			
Personal			
*Tax Litigation / Audits			
WILLS, TRUSTS & ELDER	мм	Ρ	D
Elder Abuse / Neglect			
Estate Administration			
Estate Court / Probate			
Estate Planning			
Guardianship			
Living Will / Advanced Directive			
Power of Attorney			
Simple Will.			
Trusts			
Elder Benefits			

Modest Means panel attorney fees are capped at \$100/hr, and a retainer fee for a Modest Means referral is capped at \$1,000.



# MILWAUKEE BAR ASSOCIATION LAWYER REFERRAL AND INFORMATION SERVICE

Complete and submit an additional form for each Experience Panel requested.

# **EXPERIENCE PANEL REGISTRATION**

Name	
Firm Name	

For each panel you selected with an asterisk (\*) next to it, you will need to complete this Experience Panel Registration form.

Criminal Law Check One	: Felony	Federal
Malpractice Check One:	Medical	Legal
Check One: Patent	Copyright	Trademark
Check One: Tax	Bankruptcy	

#### **Requirements for membership:**

• LRIS membership. Enrollment in Experience Panels is only open to current MBA LRIS members.

• Satisfactory case experience. Please list five cases in the specific above selected area of law litigated through completion (or represented to adjudication) within the last five years (include docket # and date). If you do not have 5 cases to list, please list your case experience here and the LRIS Committee will consider your application for this panel.

1.	
2.	
3.	
4.	
5.	

I certify that I meet the eligibility requirements as outlined above for membership to the Milwaukee Bar Association Lawyer Referral and Information Service Experience Panel in the above selected area of law.

Signature:	
Date:	