
MEMBERSHIP COMMITTEE BEST PRACTICES AND PROCEDURES

TO: Jon Polenberg, Alan Howard, and Melanie Damian
FROM: Zachary Hyman and Amir Isaiah,
SUBJECT: Membership Practices and Procedures
DATE: May 17, 2016
CC: Amanda Fernandez, Sara Paris

The Membership Committee is tasked with the responsibility of facilitating active participation in the Business Law Section, and encouraging new members to join the Section. While these goals are not mutually exclusive, they do create tension. Having more members is good, but having too many people will eliminate intimacy. On the other hand, too few members will prevent the Section from properly functioning, decrease the value of the Section to members, and diminish the amount of funds received annually by the Section for membership dues, which would have an adverse effect on its operating budget. To accomplish these goals, Membership seeks to implement the following procedures and practices.

A. The Message of the Business Law Section.

Membership has developed a short clear explanation of the Section's purpose and the benefits it provides. Membership recommends that the foregoing message be disseminated in CLE's and other events such as view from the bench to show the value of the section to members. Below is Membership's suggested language:

The Business Law Section of the Florida Bar's ultimate goal is to advance business interests in the state of Florida. In furtherance of that goal, legal issues and problems are discussed in the substantive committee meetings. Once identified, we seek to find solutions to those issues by creating task force groups, or subcommittees, which search for and provide recommendations to solve problems — or improve things — to promote business interests in Florida. If the recommendations are accepted, we seek to implement solutions by drafting legislation or taking other appropriate action. We hope that you will participate in this process during the course of the year. Indeed, you may have already begun participating in the upcoming submission of two statutory revisions to the Florida legislature.

The other non-substantive committees are also important to this process, as they facilitate the exchange of new ideas and the implementation of positive change (i) by providing case law updates; (ii) notifying members of actions taken by the section; (iii) educating attorneys and members; and (iv) encouraging people from diverse backgrounds to join and participate in the Business Law Section. These efforts all help make Florida a better state for businesses.

The foregoing language is intended to be used as a template. The Section spends a lot of money and resources to plan events and other programming. A statement that demonstrates the purpose of the Section and its benefits will encourage non-member attendees to join the Section and be active.

B. The Labor Day Retreat

The Labor Day Retreat is the most important event of the Section, and can be used to generate new members and encourage current members to be more active. Membership is mindful of the concern that having too many attendees would diminish the intimacy of the event, and cause the Section to incur a greater cost in subsidizing Retreat attendees, but having people attend the Retreat is the best way to make them join the Section. Membership has instituted the following programs and/or policies to encourage attendance.

i. The Welcoming Committee

Membership recommends that active current members of the Section be appointed as “hosts” for first time attendees at the Retreat. In other words, an active member of the Section is paired with a first time attendee with similar interests. The active member is given extra drink tickets to visit with their first time attendee, and is expected to introduce the first time attendee to other members. Membership also facilitates a champagne toast to get feedback from first time attendees. This procedure helps ensure that people attending the Retreat will maximize on the value of their investment. Membership also recommends that a letter similar to what is attached as **Exhibit “A”** be distributed to first time attendees before the retreat, and a letter similar to the one attached hereto as **Exhibit “B”** be distributed after the Retreat.

ii. The Room Block

Membership has established a less expensive room block, in close proximity to the venue, as an alternative option, to help reduce incidental costs of attending the retreat.

C. The BLS Scholars Program

Membership works with all of the Law Schools in the State of Florida to create a BLS Scholars program. The BLS Scholars Program consists of sponsored law students who attend the Retreat, and other events. BLS Scholars are selected by Membership. BLS Scholars are encouraged to help substantive committees with their projects and task forces. Membership also hosts a monthly conference call to provide BLS Scholars with advice. Additionally, Membership works to coordinate speakers at law schools upon request of BLS Scholars and acts as *de facto* mentors for BLS Scholars.

Law Schools are expected to help contribute to the expense of paying for law student attendance. To help reduce costs, Membership has established a room block at a hotel in close proximity to the location of the Retreat. Membership also provides law students with a stipend to attend the Bankruptcy Judicial Liaison Dinner. Membership aspires to have sufficient funds to enable BLS Scholars to attend all meetings of the Section.

D. Happy Hours

Membership aspires to host at least four (4) happy hours or other similar informal meetings per quarter. Two should be in South Florida, and the other two should be in North Florida. Some of these events have been well attended but others have had less than satisfactory attendance. Therefore, Membership hosts the majority of its events with other organizations. However, having well attended events will ensure that members are active. It will encourage members to work in committees and communicate about Section initiatives. Once attendance increases, some events should be exclusively open to members to further provide value. Generally BLS happy hours cost approximately \$500.

E. Grass Roots Efforts

Membership has discussed, but has not implemented a “grass-roots” process where law firms which historically have had a significant participation are asked to encourage their colleagues to become involved Section. Membership aspires to establish a meaningful grass-roots program.

F. YLD Division

Membership is currently responsible for the coordination of activities geared towards younger lawyers and aspires to create a Young Lawyers Division or Committee for the Section. At this juncture, Membership is working to establish programming intended to encourage young lawyers to attend the section. These programs include the Mentorship Program and the planning of a Young Lawyer’s event during the Retreat. At this juncture, Membership has not implemented such procedures and is in the process of investigating such issues.

G. Mentorship Program

Membership has established a comprehensive guide to mentoring, and aspires to establish a meaningful mentorship program. In achieving the goal of establishing a mentorship program, Membership works closely with the Inclusion Mentoring and Fellowship Committee to facilitate the mentorship program, but IMF is primarily responsible for overseeing the mentorship program. Having a viable mentorship program will encourage young professionals to be active in the Section. A copy of the Mentorship handbook is attached hereto as **Exhibit “C”**.

H. Sole Practitioner and Small Law Firm Task Force

One impediment to active membership in the Section is the indirect costs of attendance born by sole practitioners and small law firms. Membership aspires to create programs to encourage these law firms to be active in the Section and minimize the burden applicable to those attorneys.

I. BLS Outings

Membership has explored the possibility of having BLS Outings, which consist of a more substantial investment of time and money. The BLS Outings would include group attendance at sporting events, or group activities. Having BLS Outings would be another membership benefit which may encourage potential members to become active, and facilitate the growth of relationships among existing members.

EXHIBIT A



Business Law Section of the Florida Bar

WELCOME FIRST-TIME ATTENDEES

Dear First-Time Attendee,

We are very pleased to welcome you to the 2015 Business Law Section Annual Labor Day Retreat at the Ritz Carlton Naples Beach Resort. Each year, we work tirelessly to make sure that you enjoy your weekend, and that your experience is worthwhile.

To that end, we have established a Welcoming Committee on behalf of the Section. As chair of the Welcoming Committee, I have been tasked with the job of maximizing the return on your investment with the Section. In furtherance of that goal, I will introduce you to a host, who will act as your own personal guide throughout the Retreat. We have also organized a toast on Saturday, September 5, 2015 at 5:30pm during the Retreat to answer any questions that you may have, and, more importantly, to hear your thoughts.

We have also coordinated three different activities which are not in your registration packet. Those events are (1) beach yoga on Sunday at 7:20am, (2) bicycling on Saturday and Sunday morning at 6:30 am, and (3) a Whiskey tasting on Saturday night. We encourage you to participate in those activities, if you are so inclined. These activities provide great opportunities to develop meaningful relationships with members of the Section on an informal basis.

We are grateful that you decided to spend your Labor Day Weekend with us. If there is anything we can do to ensure that your experience is the best experience possible, please feel free to contact my co-chair, Amir Isaiah (305-202-0060), the Section Chair, Alan Howard (904-962-3660), or me (561-315-8910).

Thank you,

Zachary P. Hyman
Chair, Welcoming Committee
of the Business Law Section

EXHIBIT B



Business Law Section of the Florida Bar

WELCOME FIRST-TIME ATTENDEES

Dear [Name],

It was a pleasure getting to know you at the 2015 Business Law Section Annual Labor Day Retreat at the Ritz Carlton Naples Beach Resort. We are very grateful for the opportunity to show you what the Business Law Section does, have you participate in committee meetings, and introduce you to members of our Section.

The Business Law Section of the Florida Bar's ultimate goal is to advance business interests in the state of Florida. In furtherance of that goal, legal issues and problems are discussed in the substantive committee meetings. Once identified, we seek to find solutions to those issues by creating task force groups, or subcommittees, which search for and provide recommendations to solve problems — or improve things — to promote business interests in Florida. If the recommendations are accepted, we seek to implement solutions by drafting legislation or taking other appropriate action. We hope that you will participate in this process during the course of the year. Indeed, you may have already begun participating in the upcoming submission of two statutory revisions to the Florida legislature.

The other non-substantive committees are also important to this process, as they facilitate the exchange of new ideas and the implementation of positive change (i) by providing case law updates; (ii) notifying members of actions taken by the section; (iii) educating attorneys and members; and (iv) encouraging people from diverse backgrounds to join and help the Business Law Section. These efforts all help make Florida a better state for businesses.

We encourage you to participate in the efforts of the Business Law Section during the course of the year. Further, we have two more meetings during the upcoming year. Specifically, the members of the Business Law Section will be meeting in Orlando on _____, and in _____ on _____. In the meantime, if you're interested in participating in these efforts, or would like to just listen in on a conference call to educate yourself, please feel free to reach out to one of us or any of our Committee Chairs.

We are incredibly appreciative of your decision to spend your Labor Day Weekend with us, and hope that it is the first of many. If there is anything we can do to improve your experience, or if you have any questions, please let us know. We will also be sending you a survey to learn more about your experience. Taking the time to complete it will help us improve upon future retreats.

Sincerely,

Alan Howard
Chair

Zachary P. Hyman
Co-Chair, Membership Committee

Amir Isaiah
Co-Chair, Membership Committee

EXHIBIT C

Dear Dean Levine,

On behalf of the Business Law Section of the Florida Bar (the “BLS”), we wish to thank you, for your participation in the Business Law Section Scholars Program (the “Scholars Program”).

The BLS’s ultimate goal is to advance business interests in the state of Florida. In furtherance of that goal, legal issues are discussed in the substantive committee meetings. Once identified, we seek to find solutions to those issues by creating task force groups or subcommittees, which search for and provide recommendations to solve problems — or improve things — to promote business interests in Florida. If the recommendations are accepted, we seek to implement solutions by drafting legislation or taking other appropriate action. We hope that you will participate in this process during the course of the year. Indeed, you may have already begun participating in the upcoming submission of two statutory revisions to the Florida legislature.

The other non-substantive committees are also important to this process, as they facilitate the exchange of new ideas and the implementation of positive change by: (i) providing case law updates; (ii) notifying members of actions taken by the section; (iii) educating attorneys and members; and (iv) encouraging people from diverse backgrounds to join and help the BLS. These efforts all help make Florida a better state for businesses.

We hope to get students in your law school involved in this process through the Scholars Program. To offer a backdrop of our Scholars Program, the BLS selects 6 Fellows (recent grads/new attorneys) each year as part of our Fellowship Program and provides them with a \$2,500 budget each year for two years to cover expenses relating to their involvement with the Section (i.e., registration, travel, room and board, etc.).

The new Scholars Program Initiative is similar to the Fellows Program, but it is for law students, and has less of a budget. The idea behind the Scholars Initiative Program is for the BLS, together with the various Florida law schools, to pick 2-4 students each year from their respective law school, to serve as “ambassadors” for the Section and their respective schools’ Business Law Society/Section/business related organization (if one exists – if not, perhaps one will be created). Members of the executive board for each law school’s business law organization would, naturally, be ideal candidates for selection (although there is no such requirement of Scholar candidates). The idea, furthermore, is to meet minimum diversity thresholds in the selection process.

To that end, the Scholars Program funds the attendance of law students at the BLS Annual Labor Day Retreat (the “Retreat”), which this year runs September 4-7 at the Ritz Carlton, Naples (for more specific information, including the time and day of the committee meetings, please see attached BLS Retreat Agenda or visit <http://www.flabizlaw.org/files/retreat16flyer.pdf>). Additionally, as part of the Scholars Program, we provide a stipend for students to attend other networking events. We also work to coordinate programming in law schools and have a monthly conference call to provide scholars with mentorship and advice. We also hope to provide scholars an opportunity to participate, in a

meaningful way, in the programming of the BLS. We also require the Fellows (who each have a Social Mentor and Substantive Mentor that are members of the Section) to act as mentors for the Scholars, thereby laying down a meaningful foundation for students and young attorneys to be involved and help grow the BLS, and pay their dues as they make their way up to leadership positions.

To further improve the Scholars program, we ask that the law school administration or an affiliated organization (such as the student government or alumni organization) help subsidize the award. The four (4) FSU Scholars who attended last year's Retreat, were funded by an alumni which provided a \$500 stipend for each Scholar. At this juncture, the Section is willing to commit up to \$350 per Scholar to attend the Retreat.¹

Based on the foregoing, we would ask that you contribute between five to six hundred dollars per student. The section will also contribute up to three hundred and fifty dollars per student. With this contribution, Scholars will be able to attend the retreat free of charge, and will enjoy a fantastic experience.

Moreover, by being active in the Section, Scholars will be more marketable and will have significant exposure with senior partners of major law firms and leaders of the Florida Bar. Last year, for example, the Scholars had the opportunity to listen to Paul Singerman and Bill Schifino, President of the Florida Bar, talk about the practice of law. We hope to further improve upon the programming available to Scholars in 2016, and are optimistic that your law school will continue to support the Scholars Program.

As the Retreat is only a few months away, we ask that you commit to supporting the Scholars program. Because our goal is to help students in your law school advance their legal careers through the BLS, there is no obligation to contribute money. However, we feel that contributions will only inure to the benefit of your law school, and are critical to the continued viability of the Scholars program. Please let us know if there is anything we can do to be of

¹In the past, the Membership Committee of the BLS has worked diligently to help cover the registration cost for all law students who wish to attend. In 2015, that amount was \$275. That covered attendance to all meetings, the Friday night reception, the Friday night dinner, the Saturday night reception, the Saturday night Family Dinner & Casino Night, the Sunday breakfast buffet, the Sunday night reception, and access to the hospitality suite throughout the entire weekend. Add-ons include the Saturday networking luncheon (which for students would be the actual cost to the Section – not sure what that is, probably around \$50), the Sunday night Dinner on the Town, and the various extra excursion activities such as Golf Tournament (\$100), Kayak Adventure (\$50), Wine Tasting (\$40), and other fun activities including spa access, beach related rentals, etc. The total cost (without room sharing) for registration, room, board, and travel can typically run around \$1,000 to \$1,200 per person for two nights, and an additional \$275 for a third night, at the Ritz Carlton. However, we have arranged another far more affordable room block at the Courtyard Naples, which is 5 miles south of the Ritz, at a nightly rate of \$105 for a King or double room, if booked by next Friday, August 21, 2015. We also believe that having scholars share hotel rooms would provide an opportunity to network with students from other law schools and would further reduce costs.

assistance. We also ask that you please provide us with a list of potential candidates for consideration as scholars in 2016.

Again, thank you for your consideration. . Please do not hesitate to contact us if you should have any questions or concerns.

All the best,

Amir Isiah
Chair, Membership Committee
Business Law Section of the Florida Bar

Zachary Hyman
Co-Chair, Membership Committee
Business Law Section of the Florida Bar

EXHIBIT D



The Florida Bar
Business Law Section
Member & Law Student
Mentorship Programs Handbook

Table of Contents

Mission Statement	3
Goals of Program	4
Guidelines for Member Mentorships	5
Guidelines for Law Student Mentorships	8
Procedures	10
Mentor Registration Form	11
Member Mentee Registration Form	12
Law Student Mentee Registration Form	13
Member Curriculum	14
Law Student Curriculum	18

Mission Statement

The Business Law Section of the Florida Bar ("BLS") Mentorship Programs are designed to provide:

- Membership exposure, guidance and encouragement to members of the BLS who are recent law school graduates, newly practicing attorneys, or attorneys changing the scope of their practice; and
- Membership exposure, guidance and encouragement to law students interested in practicing business law in Florida and/or learning more about the BLS, and rendering assistance, when requested, in dealing with the rigors of the bar examination process.

in order to promote awareness, understanding, appreciation, and application of the principles of law including the importance of ethical conduct and professionalism. The court system, The Florida Bar, the BLS, and the public will benefit from this effort, as mentees gain greater insight into the practice of business law and both mentors and mentees become more involved with the BLS.

GOALS OF THE MENTOR - MENTEE RELATIONSHIP

The primary functions of the BLS Mentorship Programs are to promote involvement in the BLS and to provide meaningful insight into the various practice areas of business law in Florida.

A successful mentor is someone who is a good person first and a great lawyer second; someone who seeks knowledge and is guided by clear moral principles in both personal and professional levels. First and foremost, as a teacher, a mentor should also be a person who helps the mentee navigate the professional world and assists the mentee in making connections that will be valuable throughout the mentee's career. A mentor is responsible for managing mentor-mentee relationship, and should encourage the mentee to reach out with questions and for advice.

A successful mentee is someone who is motivated to be an exceptional lawyer, and who recognizes the need for constant improvement. The mentee must have love and respect for the profession, and should recognize that there is a human component to a lawyer's training which includes the kind of contact a true mentor can offer.

Mentors are given the opportunity to influence the way mentees interact with their colleagues and practice law, thus influencing the future of the profession. Mentees are given the opportunity to be molded by some of the finest business lawyers in Florida, in an atmosphere where candid yet confidential exchanges between the mentor and the mentee can take place.

Guidelines for Mentorships

A. Guidelines for Mentors:

A mentor must be a member in good standing of The Florida Bar and have been practicing law for a minimum of five (5) years (or less if approved by the Chair of the Section). The specific activities of a mentor will be guided by the curriculum found within this Handbook.

In order to facilitate a true mentor/mentee relationship, meetings or conferences should take place at least once every three (3) months. Generally speaking, the mentor should focus on facilitating the mentee's familiarity with and exposure to the practice of law and the BLS by:

1. Inviting the mentee to BLS events and introducing the mentee to the judiciary, court officials, and other lawyers and members of the BLS.
2. Providing a sounding board for the mentee to discuss practice and career related issues.
3. Advise the mentee on business development skills and tactics.
4. Assist the mentee in navigating the pitfalls and internal politics associated with practice in a law firm.
5. Providing law student mentees with pre-career guidance and counseling, including dealing with the rigors of bar examination preparation.
6. Introducing the mentee to the judiciary, court officials, and other lawyers and members of the BLS.

A mentor's role should introduce the mentee to business law (and specialized areas within business law), and to encourage participation in the BLS. The goal of the BLS Mentorship Programs is to facilitate an exchange of ideas, experiences and knowledge. Mentors should share their stories with mentees to help them both feel more comfortable with and learn from the mentor's good and bad experiences.

Both the mentor and mentee are cautioned that they should take appropriate steps to avoid even the appearance of the existence of any attorney/client relationship with each other's clients. Mentors and mentees

should keep in mind, and remind each other of the importance of client confidentiality, applicable privileges and client conflicts. Mentors and mentees should also remind each other that any detailed conversation about the specifics of a problem and/or situation involving a client might require prior consent from the client before making such disclosure. This also applies to any discussion or presentation of specific facts through hypotheticals in which the identity of any client is concealed.

The mentoring relationship is intended to provide general assistance, but it is not a means to provide mentees with answers to case specific questions or to relieve mentees from their own professional responsibilities and obligations. Likewise, mentors should not assist or advise mentees with personal legal matters or legal matters involving family or friends. The mentee is expected to make an independent professional evaluation of all advice received and should be instructed to advise his or her clients based solely upon the mentee's professional opinion, research, and evaluation. In no event shall the mentor be held liable for advice provided.

Although the mentoring relationship is a resource to enhance the mentee's professional development, it is not an internship, externship, or clerkship, and should not be treated as such. Any employment opportunities between a mentor and mentee are and should be kept completely outside of the BLS Mentoring Program. Although a mentor/mentee relationship may lead to the mentee's employment, the mentorship program is not intended to assist any mentees in obtaining any employment.

Ultimately, through the mentoring relationship, it is expected that all participants will enjoy enhanced career success, a greater realization of the importance of service to the community and the profession, and a consistent effort toward the ethical and competent practice of law.

B. Guidelines for Mentees:

In order to facilitate the effective and efficient realization of the BLS Mentoring Programs' goals, mentees should be available to meet and/or confer with their mentors every three (3) months. Such meetings should be held in person whenever possible. The mentee is expected to prepare for meetings with the mentor by preparing specific questions and/or issues to raise and discuss during mentoring meetings.

The mentee should recognize that any disclosure of the specifics of a problem or situation might implicate the attorney-client privilege and confidentiality obligations prescribed by the Rules of Professional Conduct of the Rules Regulating The Florida Bar. Mentees are encouraged to inquire of and discuss with mentors the importance of client confidentiality and client conflicts.

Mentees should make their best effort to pose questions or inquiries to avoid disclosing client identities and to avoid any potential conflicts of interest, bearing in mind however, that disclosure of specific factual situations may have ethical implications. Mentees are encouraged to ask questions regarding substantive, practical, and ethical issues which they may encounter, regardless of how elementary the mentee might view the inquiry. Mentors and mentees should recognize that there is no such thing as a stupid question.

Mentees are expected to treat mentors with customary professionalism and respect. Although mentors will work to make themselves available to advise mentees as needed, mentees must exercise consideration and discretion regarding the use of the mentor's time. Ultimately, it is envisioned that the mentoring relationship will result in significant enhancement in the mentee's character, competence, and commitment to the ideals of the legal profession. A mentee who is open and eager to receive ideas on the practice of law will enjoy the greatest success and benefit from the mentoring relationship.

PROCEDURES

1. BLS members who a) are members in good standing of The Florida Bar, and b) have practiced law for a minimum of five (5) years (or less if approved by the Chair of the BLS), may volunteer to serve as mentors through the Program. To register, mentors must complete the registration form contained in this Handbook. Mentors may also access the registration form through the BLS website (www.flabizlaw.org). The BLS Mentoring Committee will pair the mentor with a mentee.
2. BLS members who a) are members in good standing of the Florida Bar, and b) have practiced business law for less than five (5) years (or more if approved by the Chair of the BLS), may apply for a mentor through the Program. To apply, member mentees must complete the registration form contained in this Handbook. Member mentees may also access the registration form through the BLS website (www.flabizlaw.org). The BLS Mentoring Committee will pair the member mentee with a mentor.
3. Law students who a) are enrolled in an accredited law school, and b) register as student members of the BLS, may apply for a mentor through the Program. To apply, law student mentees must complete the registration form contained in this Handbook. Law student mentees may also access the registration form through the BLS website (www.flabizlaw.org). The Chair of the BLS will review the application and, if approved, the BLS Mentoring Committee will pair the law student mentee with a mentor.
4. It is the mentor's responsibility to make initial contact with the mentee and to establish a regular meeting schedule amenable to both. A curriculum of issues to be addressed, as appropriate (depending on whether the mentee is a BLS member or a law student) is contained within this Handbook.
5. It is recommended that the mentoring relationship be continued for a minimum of one year. Informal extension of the relationship which may naturally occur is a matter solely between the mentor and mentee.

BLS MENTORSHIP PROGRAM: MENTOR REGISTRATION FORM

Name: _____

Email: _____ Phone: _____

Practice Area(s): _____

Years Practicing: _____ Florida Bar No.: _____

Hobbies or Interests: _____

___ I am interested in mentoring a new business lawyer who practices in the following area(s):

- | | |
|--------------------------|--------------------------|
| a) Business Litigation | b) Bankruptcy/UCC |
| c) Antitrust | d) Intellectual Property |
| e) Business Transactions | f) Tax Law |
| g) Employment Law | h) Other _____ |

If you would like multiple mentees, please indicate how many: _____

___ I am interested in mentoring a law student from the following program(s) (circle all that apply): Ave Maria, Barry University, Florida A&M University, Florida Coastal, Florida International University, Florida State University, Nova Southeastern University, St. Thomas University, Stetson University, University of Florida, University of Miami, Other _____.

who is interested in the following type(s) of business law (circle all that apply):

- | | |
|--------------------------|--------------------------|
| a) Business Litigation | b) Bankruptcy/UCC |
| c) Antitrust | d) Intellectual Property |
| e) Business Transactions | f) Tax Law |
| g) Employment Law | h) Other _____ |

If you would like multiple mentees, please indicate how many: _____

I certify that I am a member in good standing of The Florida Bar and will abide by the policies set forth in the BLS Member & Law Student Mentorship Programs Handbook.

Signed: _____

Name (Print): _____ Date: _____

BLS MENTORSHIP PROGRAM: MEMBER MENTEE REGISTRATION FORM

Name: _____

Email: _____ Phone: _____

Former Practice Area(s): _____

Current Practice Area(s): _____

Geographical Location: _____

Years Practicing: _____ Florida Bar No.: _____

Hobbies or Interests: _____

I am interested in being mentored by a BLS member who practices in the following area(s): (circle all that apply)

- | | |
|--------------------------|--------------------------|
| a) Business Litigation | b) Bankruptcy/UCC |
| c) Antitrust | d) Intellectual Property |
| e) Business Transactions | f) Tax Law |
| g) Employment Law | h) Other _____ |

I certify that I:

___ Am a member in good standing of the Florida Bar; and

___ Have not practiced business law in Florida for more than five (5) years or have been approved by the Chair of the BLS to be a mentee,

and I will abide by the policies set forth in the BLS Member & Law Student Mentorship Programs Handbook.

Signed: _____

Name (Print): _____ Date: _____

BLS MENTORSHIP PROGRAM: LAW STUDENT MENTEE REGISTRATION FORM

Name: _____

Email: _____ Phone: _____

Law School Attending: _____

Current Law School Level (please circle one): 1L 2L 3L

Anticipated Geographical Practice Area (if known): _____

Hobbies or Interests: _____

I am interested in the following area(s) of business law: (circle all that apply)

- | | |
|--------------------------|--------------------------|
| a) Business Litigation | b) Bankruptcy/UCC |
| c) Antitrust | d) Intellectual Property |
| e) Business Transactions | f) Tax Law |
| g) Employment Law | h) Other _____ |

I certify that I:

___ Am a second (2L) or third (3L) year law student enrolled in an accredited Florida law school; and

___ Am a student member of the BLS or have enclosed my application for student membership in the BLS (together with any applicable fees),

and I will abide by the policies set forth in the BLS Member & Law Student Mentorship Programs Handbook.

Signed: _____

Name (Print): _____ Date: _____

Member Mentoring Curriculum

I. Substantive Legal Mentorship

- A. Essentials of the Practice (to be determined by the mentor within the practice area chosen)
 - 1. Common Legal Principles and New Developments
 - 2. Research
 - 3. Oral Advocacy
 - 4. Effective Legal Writing

II. Character

- A. Professionalism:
 - 1. Relations with other lawyers (including associates, co-counsel, and opponents)
 - 2. Local procedures and customs/"unwritten rules"
 - 3. Civility, integrity and judgment
- B. Ethics:
 - 1. Engaging in business with clients
 - 2. The duty to report ethics violations
 - 3. Recognizing professional limitations
 - 4. Communication
 - 5. Fees
 - 6. Confidentiality
 - 7. Conflicts of interest (current and former client)
 - 8. Trust account procedures and obligations
 - 9. Candor
 - 10. Fairness to opposing party and counsel

- C. Obligations to Clients
- D. Obligations to The Bar
- E. Obligations to The Court
- F. How to Identify Conflicts
- G. Balancing Life and the Practice of Law
- H. The Humane Approach to the Practice (financial and non-financial rewards)
- I. Self-Help Awareness (Florida Bar programs addressing substance abuse, Florida Lawyers Assistance, etc.)
- J. Confidentiality
- K. The Bar Disciplinary System

III. Competence

- A. Office Procedure and General Orientation:
 - 1. Office economics:
 - i. practical aspects (such as overhead, etc.)
 - ii. billable hours and time management
 - 2. Office technology:
 - i. availability of valuable resources/books
 - ii. office supply source availability
 - iii. computers (hardware and software)
 - iv. internet
 - 3. Hiring support staff
 - 4. Locating an office
 - 5. How to collect fees/retainers
- B. Where to go to seek assistance (SCOPE, fellow attorneys)

C. Courtroom Decorum

D. Courthouse Orientation:

1. If relevant, escort mentee to courthouse and introduce him/her to members of judiciary

E. Courthouse Procedures

F. Non-Courtroom Decorum and Practices:

1. Public addresses
2. Advertising
3. Dealing with adversaries
4. Dealing with clients
5. Alternative dispute resolution(s)
6. Establishing fees
7. Accepting/selecting cases and clients (how to say "no")

G. How and When to Refer and Accept Referrals

H. Organization of Files and Records

I. Handling Trust Accounts and Client Funds

J. Sources of Business and Their Cultivation/ Marketing

K. Importance of Attention and Responsiveness to Clients

L. Continuing Legal Education

M. Real Life Experiences/War Stories

N. Evaluating Cases

O. Malpractice.

IV. Commitment

A. Pro Bono Work

B. Florida Bar Involvement

C. Business Law Section Involvement:

1. Meet at mentor's law office for introduction to other lawyers there
2. Attend a BLS meeting together
3. Introduction to other lawyers in the community and BLS members

D. Community Activism

E. Duty to The Bar

F. Obligation to Give Back to Community

V. Dealing with the rigors of Bar examination preparation

Law Student Mentoring Curriculum

I. Substantive Business Law Principles

- A. Essentials of the Practice (to be determined by the mentor within the business law area of interest)
 - 1. Common Practice Strategies
 - 2. "Unwritten" Rules of Practice
 - 3. Geographical Considerations

II. Practice Considerations

- A. Law Firms
- B. Solo Practice
- C. Where to go to seek assistance (SCOPE, fellow attorneys)
- D. Sources of Business/Cultivation
- E. How and When to Refer and Accept Referrals
- F. Importance of Attention and Responsiveness to Clients
- G. Real Life Experiences/War Stories

III. Character

- A. Professionalism:
 - 1. Relations with other lawyers (including associates, co-counsel, and opponents)
 - 2. Civility, integrity and judgment
- B. Ethics:
 - 1. Engaging in business with clients
 - 2. The duty to report ethics violations
 - 3. Recognizing professional limitations
 - 4. Communication

5. Fees
6. Confidentiality
7. Conflicts of interest (current and former client)
8. Trust account procedures and obligations
9. Candor
10. Fairness to opposing party and counsel

C. Obligations to Clients

D. Obligations to The Bar

E. Obligations to The Court

F. How to Identify Conflicts

G. Balancing Life and the Practice of Law

H. The Humane Approach to the Practice (financial and non-financial rewards)

I. Self-Help Awareness (Florida Bar programs addressing substance abuse, Florida Lawyers Assistance, etc.)

J. Confidentiality

K. The Bar Disciplinary System

IV. Commitment

A. Pro Bono Work

B. Florida Bar Involvement

C. Business Law Section Involvement:

1. Meet at mentor's law office for introduction to other lawyers there
2. Attend a BLS meeting together
3. Introduction to other lawyers in the community and BLS members

D. Community Activism