

[ \_\_\_\_\_ ]  
**MENTORING PROGRAM  
HANDBOOK**

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# **SECTION 1**

## THE MISSION STATEMENT

[\_\_\_\_\_] Mentoring Program is designed to provide guidance to recent Florida Bar admittees that will instill the importance of professionalism. By harnessing the experience of high principled, successful practitioners, new Florida Bar admittees will be offered a resource that will spare them from experiencing many of the pitfalls that are a by-product of a lack of familiarity with the practice of law in Florida.

By promoting the awareness, understanding, appreciation and application of the principles of professionalism, the Bench, the Bar, and the public will benefit as the quality, efficiency and humanity of the judicial system elevates.

*"The lamp that lights my way is experience."*

- Patrick Henry

## **SECTION 2**

## GOALS OF THE MENTOR/MENTEE RELATIONSHIP

The qualities of an excellent lawyer include evidencing good *character and civility*, exhibiting *competence* in the practice of law, and establishing a *commitment* to clients, the profession, and the judicial system. Appropriate attention to these qualities will help restore the legal profession to its former glory as one that commands respect in our society. The mentor/protégé relationship seeks to facilitate the newly admitted lawyer's attainment of these goals.

The successful mentor is first a teacher, an informed and experienced professional. Second, a mentor is a connector, a person who helps the mentee in the professional world, assisting the mentee in making the contacts and network that will be of value throughout the mentee's career. Third, a mentor is responsible for managing the heart and spirit of the mentor/mentee relationship. A successful mentor is someone who is a good person first and a great lawyer second: someone who seeks knowledge yet cherishes humanity; and someone who is guided by clear moral principles in both personal and professional levels.

The successful mentee is someone who is motivated to be an exceptional lawyer. The mentee must have a love and a respect for the profession and recognize that there is a "people" component of a lawyer's training that should include the kind of contact that a true mentor can offer. The mentor/mentee relationship affords opportunities for all participants. Mentors are given the opportunity to influence the way new lawyers 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 legal talent in the Bar in an atmosphere where candid, yet confidential, exchanges between the mentor and mentee can take place.

The mentor/mentee relationship is not one in which either performs the duties of a "glorified law clerk" for the other. Instead, the mentor is a guide, showing the mentee how and where to find the answers. Lao Tzu most eloquently described this aspect of the relationship when he said, "If you *give* a man a fish, you feed him for a day. If you *teach* a man to fish, you feed him for a lifetime." Thus, the mentor facilitates the mentee's independence, growth, and sense of professionalism.

It is expected that the participants will discuss their vision for the ideals and future of the profession. The frustrations of the practice of law should be openly discussed, combined with brain storming for immediate and long-term solutions to these problems. Practically, the mentor/mentee relationship should bridge the gap between law school and the practice of law by providing guidance in the new lawyer's professional conduct and promoting a sense of pride in being a practicing lawyer. A successful mentoring program will result in the improvement of service to clients and the improvement of the public perception of the legal profession. Professional satisfaction, socialization, and an increased camaraderie within the Bar are likewise inevitable with the implementation of a successful mentoring relationship. Lawyers are

colleagues and co-workers in making the legal system work justly and effectively. Lawyers therefore have mutual obligations, including the obligations of the experienced to those lawyers that are less experienced. The willingness to seek and give assistance to one another is the hallmark of true professionalism.

## **SECTION 3**

## GUIDELINES FOR PARTICIPANTS

### Guidelines for Mentors:

As a mentor, you are among a limited number of hand-selected distinguished members of the Bar who have practiced at least [\_\_\_\_\_] years. Your reputation for character, competence, civility, and commitment is beyond reproach. Most importantly, your mentee will recognize that you possess these traits and, as such, will exhibit confidence and reliance upon your advice and leadership. The position of mentor brings with it an inherent respect by the mentee, which should be capitalized upon and nurtured from the very beginning.

The specific activities of a mentor will vary with the needs of the mentee while, at the same time, be guided by the checklist found within this handbook. At a minimum, the mentor should initiate and conduct an initial face-to-face meeting with the assigned mentee at the earliest possible date. In order to facilitate the initial contact, as well as the ongoing relationship, a mentor should inform his/her office personnel of the identity of the mentee and of the high priority the mentor places on this relationship.

In order to facilitate the true mentor/mentee relationship, meetings should take place at least once a month. Generally speaking, the mentor should focus on facilitating the mentee's familiarity with, and exposure to, the following matters:

1. Arranging for the mentee to observe the mentor in court and other practice settings, negotiations, transactional events and the like;
2. Sharing sample pleadings and forms;
3. Providing career counseling;
4. Inviting the mentee to professional social events and introducing the mentee to the judiciary, court officials, and other lawyers.

Mentors will find it helpful to calendar periodic reminders of the need to initiate meetings with the mentee. Another excellent opportunity for expanding the mentor /mentee relationship can be arranging to attend ethics or professionalism seminars together in order to facilitate frank discussion regarding the issues raised.

It should be recognized that a mentor's role is to bridge the gap between law school and the practice of law, which all mentors recognize is a wide one. Mentors should strive to address the mentee's concerns on a level which fosters thoughtful discussion. If a mentor finds that a mentee is unable to focus the mentee's questions or concerns, the mentor should guide the mentee to a topic. The goal of the program is an

exchange of ideas rather than regularly scheduled lecture sessions. Mentors should share their "war stories" with mentees to help them both feel more comfortable with and learn from the mentor's good and bad experiences. Mentors are encouraged to share with mentees their thoughts about what they believe make a recently licensed attorney an asset to his/her new employer.

Mentors shall not be required nor be expected to perform any research as a result of an inquiry made by a mentee. Likewise, mentors should not accept employment as co-counsel. 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 should keep in mind, and remind their mentees, of the importance of client confidentiality. Mentors should remind mentee that any detailed conversation about the specifics of a problem and situation involving a client of a mentee might require prior consent from the mentee's client before making such disclosure or presentation through hypotheticals in which the identity of any client is concealed. The mentor 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. The mentee is expected to make a professional evaluation of all advice received and should be instructed to advise his or her client based solely upon the mentee's professional opinion, research, and evaluation. In no event shall the mentor be held liable for advice provided.

Ultimately, through the mentor/mentee 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 the consistent effort toward the ethical and competent practice of law.

### **Guidelines for Mentees:**

The mentor relationship affords the mentee the opportunity to heighten the degree of professionalism and competence with which they represent their clients by creating an avenue for them to learn from distinguished members of The Florida Bar. In order to facilitate the effective and efficient realization of the program's goals, mentees should be available to meet with their mentors on at least a monthly basis. The mentee is expected to prepare for meetings with the mentor by reviewing the checklist items found within the handbook and prepare specific questions and issues to be raised and discussed during mentor/mentee meetings. Mentees should ask the mentor questions, regardless of how elementary the mentee might view the inquiry. The mentee should recognize that a mentor is not expected to do legal research, nor does the mentor accept professional responsibility for any advice given. The mentee is responsible for making a professional evaluation of all advice received from the mentor and shall advise his/her client based

solely upon the mentees professional opinion, research and evaluation. In no event shall the mentor be liable for advice provided

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.

Mentees should not ask mentors to accept employment as co-counsel on any case. Mentees should make their best effort to pose questions or inquiries in the form of hypothetical fact patterns to avoid disclosing client identities and to avoid any potential conflicts of interest. Mentees are encouraged to ask questions regarding substantive, practical and ethical issues which they may encounter.

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 mentor/mentee relationship will result in significant enhancement in the mentee's character, competence, civility, 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 mentor relationship.

# **SECTION 4**

## **MENTOR REQUIREMENTS**

A history of practicing with dedication to the principles of professionalism, i.e. character, competence, civility, and commitment.

[\_\_\_\_\_] years of active practice before The Florida Bar, immediately preceding application as a mentor.

A record free of reprimands, suspensions, or expulsions from any Bar Association.

No felony convictions.

# **SECTION 5**

## APPLICATION FOR MENTORS

**NOTE:** Before completing this application, please be aware of the minimum qualifications to serve as a mentor:

[\_\_\_\_\_] years practice before The Florida Bar;  
 No reprimands, suspensions or expulsions from any Bar Association;  
 No felony convictions.

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

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

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

Telephone: \_\_\_\_\_ Office: \_\_\_\_\_ Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Florida Bar Number: \_\_\_\_\_ Year admitted to The Florida Bar: \_\_\_\_\_

Areas in which you feel competent to serve as a Mentor and years of experience in the area:

|   | Years |                              | Years |
|---|-------|------------------------------|-------|
| _____ Civil                             | _____ | _____ Estates and Trusts     | _____ |
| _____ Probate                           | _____ | _____ Securities             | _____ |
| _____ Corporate                         | _____ | _____ General Practice       | _____ |
| _____ Real Estate                       | _____ | _____ Employment Law         | _____ |
| _____ Administrative Law                | _____ | _____ Business/Commercial    | _____ |
| _____ Military Veterans                 | _____ | _____ Litigation             | _____ |
| _____ Family                            | _____ | _____ Transactional          | _____ |
| _____ Environmental/Land Use/<br>Zoning | _____ | _____ Tax                    | _____ |
| _____ Sports/Entertainment              | _____ | _____ International          | _____ |
| _____ Anti-trust                        | _____ | _____ Admiralty              | _____ |
| _____ Civil Rights                      | _____ | _____ Bankruptcy             | _____ |
| _____ Condominiums/Co-ops               | _____ | _____ Collections            | _____ |
| _____ Consumer Law                      | _____ | _____ Construction/Mechanics | _____ |
| _____ Criminal                          | _____ | Lien                         | _____ |
|   |       | _____ Elder Law              | _____ |

|   | Years                |  | Years                |
|---|----------------------|--|----------------------|
| <input type="checkbox"/> Eminent Domain                       | <input type="text"/> | <input type="checkbox"/> Patents/Trademarks/<br>Copyrights | <input type="text"/> |
| <input type="checkbox"/> Health                               | <input type="text"/> | <input type="checkbox"/> Unemployment Compensation         | <input type="text"/> |
| <input type="checkbox"/> Insurance- Contracts and<br>Coverage | <input type="text"/> | <input type="checkbox"/> Immigration/Naturalization        | <input type="text"/> |
| <input type="checkbox"/> Juvenile Law                         | <input type="text"/> | <input type="checkbox"/> International Law                 | <input type="text"/> |
|   |                      | <input type="checkbox"/> Military Law                      | <input type="text"/> |
|   |                      | <input type="checkbox"/> Workers' Compensation             | <input type="text"/> |

Other (please specify): \_\_\_\_\_

Areas in which you are Board Certified: \_\_\_\_\_

Indicate your membership in Bar Associations and other Legal Organizations:

Local Bar Association (Name): \_\_\_\_\_

NBOTA

ABOTA

INNS OF COURT (Name): \_\_\_\_\_

ABA

FJA

AAJ

NELA

Other (please list): \_\_\_\_\_

Federal District, Appellate or Supreme Courts (Please list): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

In what settings have you practiced law:

|  | <b>Current</b> | <b>Past</b> |
|--|----------------|-------------|
| Private Small Firm (1-5 Lawyers)               | _____          | _____       |
| Private Medium Firm (6-20 Lawyers)             | _____          | _____       |
| Private Large Firm (over 20 Lawyers)           | _____          | _____       |
| Corporate In-House                             | _____          | _____       |
| Public Interest Law Group                      | _____          | _____       |
| Legal Services Corporation                     | _____          | _____       |
| Government (Circle one: local, state, federal) | _____          | _____       |

\_\_\_\_\_ Other (please describe): \_\_\_\_\_

I am personally motivated to be a Mentor because:

\_\_\_\_\_  
\_\_\_\_\_

Have you ever been reprimanded, suspended, or expelled from any Bar association? \_\_\_\_\_

Have you ever been convicted of a felony? \_\_\_\_\_

Do you have any special needs, travel restrictions, or physical conditions which require accommodation in any way? If so, please specify (NOTE: the response to this inquiry will not be shared with your Mentee): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

I certify that the above information is true and accurate. I understand that the information in this application will be shared with any lawyers chosen to be assigned to me as a mentee. I also understand that I must keep all confidential information received from my mentee(s) confidential, that I am not to get free legal assistance from my mentee, that I am not to provide free legal advice to my mentee, that I am not to refer cases to my Protégé for a referral fee, and that I am not to accept referrals from my mentee.

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

Mail application to [\_\_\_\_\_], together with a Certificate of Good Standing (R-10) from The Florida Bar. (To obtain, call 1-866-854-5050, Membership Records.)

# **SECTION 6**

## APPLICATION FOR MENTEES

All newly admitted attorneys who wish to be assigned a mentor are required to complete this form:

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

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

Employer's Name and Address:

\_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_ Office: \_\_\_\_\_ Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Florida Bar Number: \_\_\_\_\_ Year admitted to The Florida Bar: \_\_\_\_\_

### Education:

Undergraduate School: \_\_\_\_\_

Undergraduate degree and year received (what was major, minor and any other area of specialization): \_\_\_\_\_  
\_\_\_\_\_

Law School/Year degree awarded: \_\_\_\_\_

Other degrees (school attended, degree awarded/year awarded): \_\_\_\_\_  
\_\_\_\_\_

### Work Experience:

List full time employment you have held since graduating from college, beginning with the most recent: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you have malpractice insurance? If so, please provide the following:

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

Policy Number: \_\_\_\_\_

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

Do you have any foreign language skills?: \_\_\_\_\_

What are your outside interests?: \_\_\_\_\_

In what areas do you intend to practice?

- |  |  |
|--|--|
| <input type="checkbox"/> Civil                         | <input type="checkbox"/> Tax                               |
| <input type="checkbox"/> Probate                       | <input type="checkbox"/> International                     |
| <input type="checkbox"/> Corporate                     | <input type="checkbox"/> Admiralty                         |
| <input type="checkbox"/> Real Estate                   | <input type="checkbox"/> Bankruptcy                        |
| <input type="checkbox"/> Administrative Law            | <input type="checkbox"/> Collections                       |
| <input type="checkbox"/> Military Veterans             | <input type="checkbox"/> Construction/Mechanics Lien       |
| <input type="checkbox"/> Family                        | <input type="checkbox"/> Elder Law                         |
| <input type="checkbox"/> Environmental/Land Use/Zoning | <input type="checkbox"/> Eminent Domain                    |
| <input type="checkbox"/> Sports/Entertainment          | <input type="checkbox"/> Health                            |
| <input type="checkbox"/> Anti-trust                    | <input type="checkbox"/> Insurance- Contracts and Coverage |
| <input type="checkbox"/> Civil Rights                  | <input type="checkbox"/> Juvenile Law                      |
| <input type="checkbox"/> Condominiums/Co-ops           | <input type="checkbox"/> Patents/Trademarks/Copyrights     |
| <input type="checkbox"/> Consumer Law                  | <input type="checkbox"/> Unemployment Compensation         |
| <input type="checkbox"/> Criminal                      | <input type="checkbox"/> Immigration/Naturalization        |
| <input type="checkbox"/> Estates and Trusts            | <input type="checkbox"/> International Law                 |
| <input type="checkbox"/> Securities                    | <input type="checkbox"/> Military Law                      |
| <input type="checkbox"/> General Practice              | <input type="checkbox"/> Workers' Compensation             |
| <input type="checkbox"/> Employment Law                |  |
| <input type="checkbox"/> Business/Commercial           |  |
| <input type="checkbox"/> Litigation                    |  |
| <input type="checkbox"/> Transactional                 |  |
| <input type="checkbox"/> Other (please specify):       |  |
| <input type="checkbox"/> Don't know yet                |  |

In what size firm do you practice or intend to practice:

Private Small Firm (1-5 Lawyers)

Private Medium Firm (6-20 Lawyers)

Private Large Firm (over 20 Lawyers)

Corporate In-House

\_\_\_\_\_Public Interest Law Group

\_\_\_\_\_Legal Services Corporation

\_\_\_\_\_Government (Circle one: local, state, federal)

\_\_\_\_\_Other (Please describe) \_\_\_\_\_

Do you have any special needs, travel restrictions, or physical conditions which require accommodation in any way? If so, please specify: \_\_\_\_\_

\_\_\_\_\_

Mail application to:

# **SECTION 7**

**MENTEE REGISTRATION FORM**

Name and Florida Bar Number: \_\_\_\_\_

Date of admission to The Florida Bar: \_\_\_\_\_

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

Number of attorneys in firm: \_\_\_\_\_

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

Phone:( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ Email: \_\_\_\_\_

Please state your area of practice or special interest: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*NOTE: To the extent possible, you will be matched with a Mentor who possesses the attributes requested above.*

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

Mail together with

# **SECTION 8**

## **CHECKLIST OF ISSUES TO BE ADDRESSED DURING THE MENTOR/MENTEE RELATIONSHIP**

- I. Character
  - A. Professionalism:
    - 1. Relations with other lawyers (including associates, co-counsel and opponents);
    - 2. Local procedures and customs/"unwritten rules of various courts and judges";
    - 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 (The Florida Bar programs addressing substance abuse, Florida Lawyers Assistance, Inc., etc.);
  - J. Confidentiality;
  - K. The Florida Bar Disciplinary System.
- II. Competence
- A. Office Procedure and General Orientation:
    - 1. Office economics:
      - (i) minimizing overhead;
      - (ii) billable hours and time management.
    - 2. Office technology:
      - (i) recommendations for valuable resources/books;
      - (ii) office supply source recommendations;
      - (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;
  - 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.
- III. Commitment
- A. *Pro Bono* Work;
  - B. The Florida Bar Involvement;
  - C. Community Activism;
  - D. Duty to the Bar;
  - E. Obligation to Give Back to Community.

## **SECTION 9**



*My comments or suggestions about the program are:* \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*Complete and return this evaluation at your earliest convenience. Thank you.*

## **SECTION 10**

**MEMORANDUM OF UNDERSTANDING  
WAIVER OF LIABILITY AND CONFIDENTIALITY AGREEMENT**

By signing below, I acknowledge, and agree to abide by, the following:

1. [\_\_\_\_\_] Mentoring Program assists with of the transition into the practice of law. The goal of the program is to elevate the level of civility and professionalism, and I understand and share that goal, and affirm my commitment to furthering it.
2. The mentor will not serve as legal counsel, nor do any legal research, for the mentee.
3. The mentor will not review documents, pleadings or the like, unless the mentor chooses to do so. Any review shall solely be for the purpose of educating the mentee on issues of process and professionalism of presentation. The mentor shall not render legal advice on any substantive matters contained in or concerning the documents reviewed.
4. The mentor will not attend depositions, hearings, trials, or other appearances of the mentee, unless the mentor chooses to do so. Any such attendance shall solely be for the purpose of educating the mentee on issues of process and professionalism of presentation. The mentor shall not render legal advice on any substantive matters raised in or concerning the depositions, hearings, trials or other appearances.
5. [\_\_\_\_\_] , the local Professionalism Committee, and the local Bar Association have undertaken no liability to the mentor nor mentee, and by signing this Agreement, the signer expressly waives any claims of any kind whatsoever arising from the mentor/mentee relationship against [\_\_\_\_\_] , the local professionalism committee, the attorneys working with [\_\_\_\_\_] , and the attorneys working with the local professionalism committee.
6. The mentor accepts no professional liability for any advice given. Any mentor information or advice given or received in the course of the relationship is meant as an educational tool and a guide to assist in learning the professional manner in which to fulfill an attorney's duty to Society, the State, the Courts, The Florida Bar and clients. General issues confronted in the practice of law will be discussed, including but not limited to, attorney-client communications, law office administration and management, legal ethics, conflicts of interest, client management, duty of candor to the Court, clients, opposing attorneys, opposing clients, and the public, professional handling of the office of an attorney including the use of legal processes, development of business and presentation of the mentee as a practicing attorney.
7. The mentee recognizes that the mentor cannot give advice on specific cases for a variety of substantive reasons. Although the mentor is engaged in the practice of law, the mentor is not rendering legal or professional advice to the mentee or to any clients through the mentee. The mentee shall make his or her own professional evaluation of the advice given, and shall take actions and advise clients solely upon his or her own professional opinion, research, and evaluation.

8. In discussing client problems or situations, disclosure of specific facts may involve the attorney-client or work product privilege, or other privileges or immunities recognized by law. To avoid the breach of any confidentiality, privilege, or immunity, and to avoid even the appearance of impropriety, all such situations, or potential situations, shall be handled by using hypotheticals without identifying the client or disclosing confidential or privileged communications.
9. In order to avoid any conflict, or any appearance of impropriety, it is the responsibility of the mentee to inform the mentor of the names of all clients who have hired the mentee. If the mentor identifies a conflict or potential for conflict with any particular client, the mentor shall so inform the mentee, and the mentee shall not discuss the case in any form-hypothetical or otherwise with the mentor.
10. The mentor is prohibited from providing any financial assistance to the mentee. While the mentor and mentee are expected to socialize, any expenses are to be handled "Dutch Treat."
11. The mentoring relationship will last one year, during which time, I agree to fulfill my role in this program.
12. The mentor/mentee relationship is private and confidential. Under no circumstances is the mentee to refer to the mentor as a means of endorsement or for purposes of advertisement. Only with the consent of the mentor may the mentee use the mentor as a reference. The mentor and mentee will maintain each other's confidences.
13. It is the mentor's responsibility to make the initial contact with the mentee, and to establish a regular meeting schedule amenable to both, and suitable to the needs of the mentee. The schedule may be changed upon mutual consent as the relationship grows and changes. Besides fulfilling the checklist and completing a certification of completion of the checklist items at the end of the one-year period, the remaining contact between the mentor and the mentee shall be within the sole discretion of the parties. If the mentor shall fail to appropriately fulfill his or her duties and responsibilities, the mentee shall first discuss the situation with the mentor in an attempt to resolve the problem. If unsuccessful, the mentee shall present the problem to the supervising judge. Similarly, if the mentee fails to comply with the schedule agreed upon between the mentor and the mentee, or otherwise not fulfill his or her duties, the mentor shall first discuss the situation with the mentee in an attempt to resolve the problem. If unsuccessful, the mentor shall present the problem to the[\_\_\_\_\_].
14. [\_\_\_\_\_] is sponsoring and administering the program for the sole benefit of the legal profession, generally. Neither the local bar nor The Florida Bar assumes any liability or responsibility with respect to the response to any inquiry made pursuant to the Program.

15. While the formal relationship extends only one year, informal extension of the relationship which may naturally occur is a matter solely determined between the mentor and mentee.
16. Mentee will discuss substantive questions of law or ethical dilemmas, which will arise from time to time. The cardinal rule for the mentor is to give general advice and guidance, allowing the mentee to resolve the issues for him or her self. However, if a specific answer is needed to avoid an irrevocable error by the mentee, malpractice or harm to a client, the Mentor should, if possible, gently but firmly advise the mentee of the problem and an appropriate course of conduct.
17. I recognize that I am bound by the Rules of Professional Conduct, and especially acknowledge that I have read, and agree to abide by, the following:

Preamble: "A lawyer, as a member of the legal profession, is a representative of clients, an officer of the legal system, and a public citizen having special responsibility for the quality of justice....In all professional functions a lawyer should be competent, prompt, and diligent....A lawyer should use the law's procedures only for legitimate purposes and not to harass or intimidate others....As a public citizen, a lawyer should seek improvement of the law, access to the legal system, the administration of justice, and the quality of service rendered by the legal profession. As a member of a learned profession, a lawyer should cultivate knowledge of the law beyond its use for clients, employ that knowledge in reform of the law, and work to strengthen legal education....Many of the lawyer's professional responsibilities are prescribed in the Rules of Professional Conduct and in substantive and procedural law. A lawyer is also guided by personal conscience and the approbation of professional peers. A lawyer should strive to attain the highest level of skill, to improve the law and the legal profession, and to exemplify the profession's ideals of public service....Within the framework of these rules, many difficult issues of professional discretion can arise. Such issues must be resolved through the exercise of sensitive professional and moral judgment guided by the basic principles underlying the rules."

**Rule 4-8.3, Reporting Professional Misconduct.**

"(a) Reporting Misconduct of Other Lawyers. A lawyer who knows that another lawyer has committed a violation of the Rules of Professional Conduct that raises a substantial question as to that lawyer's honesty, trustworthiness, or fitness as a lawyer in other respects shall inform the appropriate professional authority."

Use of the program is expressly conditional on the foregoing provisions, conditions, and understandings. I understand that nothing in this Agreement can alter in any way the Rules of Discipline, the Rules of Professional Conduct, or any other rule or law.

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

# **SECTION 11**

**MENTOR'S CERTIFICATION OF TASK COMPLETION**

I hereby certify that mentee \_\_\_\_\_,  
Florida Bar # \_\_\_\_\_, and I have fully and completely performed all of the tasks and  
accomplished all of the goals of the Mentor Program.

Signature: \_\_\_\_\_

Florida Bar Number: \_\_\_\_\_

Dated: \_\_\_\_\_