ADDITIONAL INFORMATION ON LEGAL SERVICES PLANS

For additional information on the operation of Legal Services Plans in the State of Florida, please feel free to contact the following resources:

1. The Florida Bar
   651 East Jefferson Street
   Tallahassee, Florida 32399-2300
   1-850-561-5600
   www.floridabar.org

2. Prepaid Legal Services Committee of The Florida Bar
   For specific information relative to Chapter 9 Legal Services Plans, go to The Florida Bar website listed above [www.floridabar.org] and then click on “Inside The Bar”, then “Committees”, then “Standing Committees”, and then “Prepaid Legal Services” under “Public Service Committees”.

3. Florida Office of Insurance Regulation
   200 East Gaines Street
   Tallahassee, Florida 32399-0305
   1-850-413-3140
   www.floir.com

   For specific information relative to non-Chapter 9 Legal Services Plans, go to the Florida Office of Insurance Regulation website listed above [www.floir.com] and then click on “Company Search”, and then select “LEGAL EXPENSE INSURANCE” under “Company Type”.

The material in this pamphlet represents general legal advice. Because the law is continually changing, some provisions in this pamphlet may be out of date. It is always best to consult an attorney about your legal rights and responsibilities regarding your particular legal situation.
**REQUIREMENTS FOR A MANAGING ATTORNEY TO ESTABLISH A CHAPTER 9 LEGAL SERVICES PLAN**

**RULE 9-2.1. REQUIREMENTS FOR ESTABLISHING A PLAN**

A managing attorney shall not be permitted to operate a plan in this state without first obtaining approval by the board of governors to establish such plan. A managing attorney seeking to obtain board approval of a plan shall file with the committee a plan application pursuant to the requirements of this chapter.

**RULE 9-2.2. FORM AND CONTENT OF PLAN APPLICATION**

A plan application shall consist of the following:

(a) Assurances by the Managing Attorney to The Bar.

(b) Agreement by and between Managing Attorney and Sponsor.

(c) Agreement by and between Managing Attorney and Plan Attorney.

(d) Other Documents.

(e) Application Fee.

**PERMISSIBLE ACTIVITIES OF MANAGING ATTORNEYS**

**RULE 9-3.1. ACTIVITIES OF MANAGING ATTORNEYS**

Managing attorneys and their employees or agents may:

(a) directly contact representatives or fiduciaries of groups for the purpose of informing them of the availability of a plan offered by the managing attorney;

(b) upon board approval of a plan, provide any written form of communication to members of the sponsor for the purpose of informing them of the availability of said plan and inviting them to become plan participants therein but only in accordance with the advertising and solicitation provisions of these Rules Regulating The Florida Bar; and

(c) do any and all things necessary and proper in order to fully and completely administer the plan.

Examples of permissible administrative activities shall include, but not be limited to, the compilation of the following:

(1) types of legal services performed;
(2) time expended per legal matter;
(3) number of plan participants receiving legal services under the plan; and
(4) the amount and method of payment of the fees paid to the plan attorney(s).

Notwithstanding any other provision herein to the contrary, the managing attorney is expressly prohibited from contracting with any third party of whatsoever type or kind to perform any administrative activities regarding the plan whatsoever.