



Law Practice Management Division Vendor and Consultant Referral Program Information Sheet

The Philadelphia Bar Association's Law Practice Management Division (LPMD) supports Bar members in activities relating to the business of practicing law by offering assistance with marketing, management, technology, finance and other areas. The purpose of the Vendor and Consultant Referral Program is to introduce Bar members to vendors and consultants who are interested in assisting them in these areas. The enclosed brochure describes the LPMD and the Vendor and Consultant Referral Program.

In order to be considered for the Vendor and Consultant Referral Program, vendors and consultants must submit a completed application to the Philadelphia Bar Association, Attn. Amy J. Seefeld, 1101 Market Street, 11th Floor, Philadelphia, PA 19107. The application must include the following:

- contact information for three clients who have used your services in the past five years and who have agreed to serve as references;
- consent to check for complaints against the applicant and the applicant's business with the Better Business Bureau, the Bureau of Consumer Protection, and/or the local Chamber of Commerce;
- agreement that upon acceptance into the Program, the vendor or consultant will provide any Bar member, who was introduced to the vendor or consultant through the Program, with a free one-hour consultation upon their request.

In addition, the applicant must meet with representative(s) of the Law Practice Management Vendor and Consultant Referral Program Committee prior to being approved for participation in the Program.

Applicants will be notified by the Philadelphia Bar Association within sixty days after completing all of the above steps as to whether the applicant has been accepted into the Program. Vendors and consultants selected to the program are required to pay an annual administrative fee of \$100.00.

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The decision to contact any vendor or consultant rests solely with the Bar member, and the Bar Association will not provide to vendors or consultants the names of Bar members to whom information has been provided.

The Bar Association reserves the right to (a) accept, reject or remove vendors and consultants for, or from, participation in the Program, (b) identify the Program participant(s) who may assist Bar members in their respective areas of interest, (c) determine which Program participant(s) to refer to Bar members, (d) require participants in the Program to submit additional information in order to qualify for the Program, (e) charge a fee for continued participation in the Program; (f) require vendors or consultants in the Program to indemnify, and hold harmless, the Philadelphia Bar Association from any liability associated with the referral.

Any applicant may be denied acceptance to the Vendor and Consultant Referral Program if the oversight committee of the Law Practice Management Division, in its sole discretion, determines that the applicant's admission would not be in the best interest of the Program and/or the Association.

If you have any questions concerning the Vendor and Consultant Referral Program, please contact: Amy J. Seefeld, Esq., Philadelphia Bar Association, 1101 Market Street, 11th Floor, Philadelphia, PA 19107, 215-238-6369, aseefeld@philabar.org.



**Law Practice Management Division
Vendor/Consultant Application Form**

Name: _____
Position/Title: _____
Company Name: _____
Address: _____
Other Office Addresses: _____
Telephone: _____
Email Address: _____
Website Address: _____
Year Company Started: _____

1) Areas in which you wish to receive client referrals:

- Practice Technology
- Financial Management
- Workforce Issues
- Business & Management Skills
- Law Firm Marketing
- Other

2) The size of the law firm(s) to which your business would like to be referred (Please keep in mind that Bar members who have expressed the most interest in the Vendor and Consultant Referral Program practice in solo or small firms, and that firm size will affect the types of services needed by the attorney(s) and their budget(s)).

- Solo or Small Firm (1 - 10 attorneys)
- Mid-Sized Firms (11 - 50 attorneys)
- Large Firms (51+ attorneys)
- Non-Profit Legal Service Organizations
- Corporate Legal Departments

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3) Please provide a detailed description of the services you could provide to Bar members. (Be specific, e.g.. monthly bookkeeping, payroll services, website design, software selection assistance, network design, human resource management, diversity training, client development, advertising, media relations, etc.) You may also attach company literature that you would like Bar members to receive.

4) Vendors/Consultants selected to be a part of this program are required to provide a minimum of one-free hour of consultation to any Bar member who was introduced to the vendor or consultant through the Program. We also encourage vendors and consultants to offer other services to Bar Members at a discounted price. Please identify any other services that you would offer to Bar Members free or at a discounted price.

5) Is your business covered by any type of general liability, workers compensation, errors and omissions, professional liability, or other insurance? If so, please identify the type(s) of insurance that covers the business and attach a copy of the declarations sheet(s) showing the nature and limits of insurance coverage.

6) Contact information for at least three clients who have agreed to serve as references for the applicant:

The undersigned applicant hereby:

- *consents to, and authorizes, the Philadelphia Bar Association to make inquiries, regarding complaints or other relevant issues, with the Better Business Bureau, the Bureau of Consumer Protection, and/or the local Chamber of Commerce and authorizes them to release information that the agency may consider confidential or privileged; and*
- *agrees, that upon acceptance into the Program, that the applicant will provide any Bar member who has obtained information about the vendor or consultant through the Bar's Vendor and Consultant Referral Program with a free one-hour consultation upon their request.*

The applicant understands, and agrees that the Bar Association has the right to (a) accept, reject or remove vendors and consultants for, or from, participation in the Vendor and Consultant Referral Program, (b) identify the Program participant(s) who may assist Bar members in their respective areas of interest, (c) determine which Program participant(s) to refer to Bar members, (d) require participants in the Program to submit additional information in order to qualify for the Program, (d) charge a fee for continued participation in the Program, and (e) require vendors or consultants in the Program to indemnify, and hold harmless, the Philadelphia Bar Association from any liability associated with the referral.

Signature of Applicant

Date

Print Name and Title