

Limited Scope in Billable Practice/Incubator Project Innovations



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TALK TO A LAWYER TODAY TRAINING

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Application of the principals discussed in this presentation to specific facts or cases should only be undertaken with the advice of knowledgeable counsel.

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- Associate Attorney at the law firm of Blachly, Tabor, Bozik & Hartman, LLC
- Practicing out of downtown Valparaiso
- Practicing primarily in the areas of Civil Litigation, Real Estate, Contracts, Estate Planning, Estate Administration, Trusts, Guardianships and Elder Law
- BA Mathematics, Purdue University 2001
- JD, Indiana University 2006
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Limited Scope in Billable Practice



- Ind. R. Prof. Cond. 6.5. Participation in Limited Legal Services Programs
 - Talk to a Lawyer Today events
- Ind. R. Prof. Cond. 1.2. Scope of Representation and Agreements
 - Provide written representation agreements including scope and fee provisions in every case.
 - This forces you to be perfectly clear about the very first issues in every case:
 - ✦ 1) what is the goal?
 - ✦ 2) who is the client?
 - ✦ 3) what is the work?
 - Get the client's signature.

Limited Scope in Billable Practice (2)



- **Ind. R. Prof. Cond. 1.2.**
 - “A lawyer may limit the scope and objectives of the representation if the limitation is reasonable under the circumstances and the client gives informed consent.” Ind. R. Prof. Cond. 1.2.(c).
 - The scope of services can be limited. This must be by agreement of the parties. This can include an agreement to not use specific approaches. Ind. R. Prof. Cond. 1.2. comment [6].
 - Any “limitation must be reasonable under the circumstances.” Ind. R. Prof. Cond. 1.2. comment [7].
 - All representation agreements must conform to the Rules of Professional Conduct and other laws. Ind. R. Prof. Cond. 1.2. comment [8].

Incubator Project Innovations



- Municipalities have recognized the value that small businesses bring to a thriving local economy.
- A new law firm is a small business with many of the same needs as other new organizations.
- Incubators represent a growing opportunity State-by-State and City-by-City.
- Two Flavors:
 - Law Firm Incubators – Space and Time for Pro Bono Work
 - Small Business Incubators – Services at Scale

Incubator Project Innovations (2)



- **Focus Points:**
 - Firm Formation – Type of Entity; Filings
 - Firm Registration – Authorization to Practice
 - Insurance – Liability and Malpractice
 - Trust Account Management – IOLTA Registration and Accounting
 - Marketing – Cost, Feedback and Ethics
 - Technology – Cloud Services and Equipment Solutions
 - Confidentiality – Protecting Client Confidences
 - Business Plan – You Are in Business Whether You Believe It or Not

Thank You!



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