

**Orange County Bar Association  
Mentoring Committee**

Post Office Box 6130  
Newport Beach, CA 92658  
Telephone: (949) 440-6700  
Facsimile: (949) 440-6710  
[mentoring@ocbar.org](mailto:mentoring@ocbar.org)



**Protégé Checklist**

Before you submit your Protégé Application, please complete this checklist to confirm that you have completed all **required** necessary steps to be considered for the OCBA Mentoring Program.

Complete and attach the following:

- I have read the Protégé Guidelines.
  
- I have completed the Protégé Application.
  
- I have completed the Protégé Participation Agreement.
  
- Enclosed proof of errors and omissions insurance certificate, in an amount not less than \$100,000 for each occurrence and \$300,000 aggregate per year.

After completing the foregoing checklist, please email the requested attachments to [mentoring@ocbar.org](mailto:mentoring@ocbar.org) or mail to: OCBA Mentoring Committee, Post Office Box 6130, Newport Beach, CA 92658.

Failure to provide all required forms and other documentation may cause a delay in processing your application.

Protégé Signature \_\_\_\_\_

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

**Deadline Date: Monday, July 28, 2014**



## **ORANGE COUNTY BAR ASSOCIATION**

### **Mentoring Program**

### **Protégé Guidelines**

#### **Requirements for Protégés**

- Orange County Bar Association Member;
- Practicing for five (5) years or less;
- Approval of the Orange County Bar Association Mentoring Committee;
- Commit to a one-year program;
- Must be available to meet with their mentor once per month;
- Complete the OCBA Protégé Application;
- Complete the OCBA Mentoring Program Protégé Participation Agreement;
- If in private practice, must be covered by errors and omissions insurance in an amount not less than \$100,000 for each occurrence and \$300,000 aggregate per year. Proof of insurance shall be provided to the OCBA with the signed "Protégé Participation Agreement".

#### **Restrictions on the Mentor-Protégé Relationship**

- Protégés shall not use the Program as a method to locate employment with their mentor or his/her firm;
- Protégés shall not request that their mentor join any matters as co-counsel nor shall protégés refer matters to their mentor during the course of the Program;
- Protégés shall not seek legal advice from their mentor on current and/or specific client matters and shall not ask their mentor to research any substantive legal issues;
- Mentors serve on a voluntary basis. Protégés should use discretion in communicating with their mentor by telephone and e-mail and should not engage their mentor in prolonged discussions or repeated e-mail correspondence;
- Protégés shall treat all communications with their mentor as confidential, but should recognize that such communications may not be privileged;
- Protégés shall not substitute information obtained from their mentor for their own judgment or legal opinions, nor otherwise rely upon information from their mentor in performing their duties and obligations to their own clients.



**ORANGE COUNTY BAR ASSOCIATION**  
**Mentoring Program**  
**2014 Protégé Application**

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

Mailing address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

OCBA Member No. \_\_\_\_\_

State Bar No. \_\_\_\_\_

**1. What characteristics of a potential mentor are most important to you? (*rank only those that are important to you, using No. 1 for the most important*):**

- size or type of practice
- location of mentor
- type of work performed
- areas of law
- years in practice
- educational background
- other \_\_\_\_\_

It is more important that your mentor (*check one*):

- live or work close to you
- match your interest areas

**2. Size or type of practice**

I would prefer a mentor who is a:

- member of a large firm (40+ attorneys firm wide)
- member of a medium firm (10-39 attorneys)
- member of a small firm (2-9 attorneys)
- solo practitioner (See also No. 9 below)
- in-house counsel
- government attorney
- legal services attorney
- other \_\_\_\_\_

**3. Location of mentor**

I would prefer a mentor who is located in the following district(s) (*please check all that apply*):

- Harbor (Balboa, CDM, Irvine, Newport, Costa Mesa)
- Central (Tustin, El Modena, Orange, Santa Ana, Villa Park)
- West (Cypress, Fountain Valley, Garden Grove, Los Alamitos, Seal/Huntington Beach, Westminster)
- South (Aliso/Mission Viejo, Coto, Laguna, Lake Forest, San Clemente, San Juan Capistrano)
- North (Anaheim, Brea, Buena Park, Fullerton, La Habra, Yorba Linda)
- No preference

**4. Areas of law**

I would prefer a mentor who works in the following areas of law (***rank no more than three and only those that are important to you, using No. 1 for the most important***):

- administrative/governmental
- bankruptcy
- business/commercial
- construction
- criminal law
- elder law
- employment/labor law
- environmental law
- family law
- general practice
- health law
- immigration law
- Indian law
- insurance defense
- intellectual property
- international practice
- juvenile law
- landlord/tenant
- personal injury/property damage
- professional liability
- real estate
- securities
- sports/entertainment law
- taxation
- wills/gifts/trusts/estates
- other \_\_\_\_\_

**5. Type of work performed**

I would prefer a mentor who engages in the following type of work (*rank only those that are important to you, using No. 1 for the most important*):

- trial practice
- litigation
- transactional
- appellate practice
- appearance before regulatory/administrative boards
- other \_\_\_\_\_

**6. Outside Interests**

I am involved (or am interested) in:

- civic activities
- bar-related activities
- other professional activities

Please list:

**7. Preferred Meeting Times**

I prefer meeting (*please check all that apply*):

- before work
- lunchtime
- after work
- other \_\_\_\_\_

**8. Preferred Means of Communication**

I prefer communication by (*please check all that apply*):

- e-mail
- telephone
- letter/facsimile

**9. For Solo and Small Practice**

I am interested in the following areas (*rank only those that are important to you, using No. 1 for the most important*):

- bank or client trust accounts
- fee and billing practice
- retainer agreements
- marketing your practice
- budgeting
- business planning
- conflicts of interest and record-keeping
- other \_\_\_\_\_

**10. Additional Information:**

Law school: \_\_\_\_\_

Year of Admission: \_\_\_\_\_

Courts Admitted/Special Admissions:

Other Professional Licenses? (CPA, MD, etc.)

Please include any additional information that would assist us in matching you with a mentor. Although we may not be able to match you with a mentor meeting all of your preferences, every effort will be made to make an appropriate match.

Please feel free to attach a current resume.

I understand that the information provided in this application, and any additional information provided by me to the OCBA Mentoring Committee, is **not confidential** and may be shared with the members of the Mentoring Committee and my chosen mentor.

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

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

Please return to: [mentoring@ocbar.org](mailto:mentoring@ocbar.org) or  
OCBA, Attn: Mentoring Committee  
P.O. Box 6130  
Newport Beach, CA 92658

**Thank you for your participation!**



**ORANGE COUNTY BAR ASSOCIATION**  
**Mentoring Program**  
**Protégé Participation Agreement**

I \_\_\_\_\_ (“Protégé”) agree to participate in the Mentoring Program conducted by the Orange County Bar Association (the “OCBA”). The purpose of the Mentoring Program, as fully described in the Protégé Guidelines that I acknowledge having received by signing below, is to provide me with an educational and professional development resource only.

I understand that, although my assigned mentor is engaged in the practice of law, my mentor will not render any legal or professional advice to me or to any of my clients. Any information provided to me by my mentor is not intended to deal with any particular legal problem and I agree that it will not be relied upon by me as such.

**I AGREE THAT THE INFORMATION I RECEIVE IN THE COURSE OF THE MENTORING RELATIONSHIP WILL NOT BE RELIED UPON BY ME AS A SUBSTITUTE FOR MY OWN JUDGMENT OR LEGAL OPINIONS, AND THAT I WILL NOT OTHERWISE RELY UPON ANY INFORMATION OBTAINED FROM MY MENTOR IN PERFORMING MY DUTIES AND OBLIGATIONS TO MY OWN CLIENTS. I FURTHER UNDERSTAND THAT THE OPINIONS AND/OR STATEMENTS OF MY MENTOR ARE NOT A SUBSTITUTE FOR MY OWN OPINIONS OR INDEPENDENT RESEARCH.**

In exchange for the opportunity to participate in the Mentoring Program, I agree on behalf of myself and my spouse, parents, children, family, partners, employees, agents, heirs, estate, executors, representatives, administrators, insurers, successors and assigns to fully release the OCBA, including its elected and appointed officers, board members, mentoring committee members, directors, employees, volunteers, mentors, protégés, agents, attorneys and any other persons or entities acting on its behalf, and each of them, from any and all claims for injury, loss, liability, professional negligence, damages, lawsuits, expenses (including, but not limited to, attorneys’ fees) and any other injury or liability to me or any other person acting on my behalf, in connection with my participation in the Mentoring Program and I agree to waive any and all rights to make any of the above claims through a lawsuit or otherwise against the OCBA and the persons provided above.

**I UNDERSTAND THIS RELEASE SHALL BE EFFECTIVE EVEN IF THE LOSS, DAMAGE OR INJURY WAS NOT FORESEEABLE OR RESULTS, IN WHOLE OR IN PART, FROM THE NEGLIGENCE OF THE OCBA OR ANY OF THE OTHER RELEASED PARTIES.**

By signing below, I acknowledge and represent that I have read, and I agree to fully comply with, the Protégé Guidelines. Further, I acknowledge and represent that **I HAVE READ THIS AGREEMENT CAREFULLY, I FULLY UNDERSTAND ITS CONTENTS AND I VOLUNTARILY AGREE TO ITS TERMS.** No oral representations, statements or inducements, apart from this written agreement, have been made. If any portion of this agreement is declared invalid by a court, the remainder shall continue in full force and effect.

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

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