

**Butler County Bar Association**  
**Annual Dues Statement - Fiscal Year 2024 - 2025** (Fiscal Year 4/1/2024 - 3/31/2025)

**Please return completed form with applicable payment by**  
**March 31, 2024 (Postmarked)**  
**Mail to: BCBA; 1501 First Avenue, Middletown OH 45044**

Name: \_\_\_\_\_ OH Supreme Ct #: \_\_\_\_\_

Organization / Firm: \_\_\_\_\_

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

Office phone: (\_\_\_\_) \_\_\_\_\_ Cell phone: (\_\_\_\_) \_\_\_\_\_

Fax: (\_\_\_\_) \_\_\_\_\_ E-mail: \_\_\_\_\_

Website: \_\_\_\_\_ OH Supreme Court Admission Date: \_\_\_\_\_

**Membership Dues (SELECT ONE CATEGORY)**

- STANDARD MEMBERSHIP (OH Supreme Court Admission prior to 2022) \$ 165.00
- EARLY STANDARD MEMBERSHIP DISCOUNT (IF POSTMARKED PRIOR TO DECEMBER 31, 2023) \$ 150.00**
- HONORARY MEMBERSHIP (OH Supreme Court Admission = 50+ years practice) FREE
- RETIRED MEMBERSHIP (OH Supreme Court current registration status = Retired) \$ 65.00
- NEW LAWYER MEMBERSHIP (OH Supreme Court Admission in 2023 – 2024) FREE

**BAR FOUNDATION DONATION** (See details on page 4)

**DESIGNATED INVENTORY ATTORNEY INFORMATION** (See details on pages 5-7)

**JOIN THE NEW LRS PROGRAM!**

- No monthly status reports to maintain
- Only pay a nominal monthly or annual subscription fee
- Participants retain all income generated by all LRS referrals

(For details and fees, see pages 8 – 16)

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**PAYMENT INFO (select one):** Cash: \_\_\_\_\_ Check # \_\_\_\_\_

Credit Card # \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Name on Card: \_\_\_\_\_ 3 Digit Security Code: \_\_\_\_\_

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

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

## **Butler County Bar Association Designated Inventory Attorney**

Attorneys do a great job looking out for their clients and anticipating their needs. Our profession demands that of us. But Attorneys do not do such a good job of taking care of themselves. For a multiplicity of reasons, the attorney comes second.

One area where we do not take care of ourselves is in planning for the unexpected illness, disability or worse, death. In 2014, the Office of Disciplinary Counsel in Columbus was storing over 2200 boxes of client files recovered from the offices of missing or deceased Ohio attorneys. We are all too often unprepared for what would happen to our practice in the event we become even temporarily unavailable to serve our clients. Your Butler County Bar Association is ready to take the necessary steps to ensure that your clients' interests are protected, even in your absence.

The Designated Attorney Inventory program is a small, simple, but important step toward protecting your practice. Your Bar Association fields many calls each year looking for information on attorneys who are retired, missing, incapacitated or deceased attorneys. We can help these callers only if we have a little information. Firms, past associates, or partners are very helpful, but the solo practitioner is at risk. When we cannot locate information on an attorney, we are left with one recourse. The Supreme Court Rules for the Government of the Bar of Ohio: “[D]isciplinary counsel or the chair of a certified grievance committee may appoint one or more attorneys to inventory the files of an attorney and take action . . . as is necessary to protect the interest of clients of the attorney.” Gov. Bar R. V §26.

The Designated Inventory Attorney project provides a starting point for clients trying to find you or needing help when you are incapacitated or even winding down your practice. This Project is a service to the Bar, the public, and attorneys' surviving families. We have initiated a voluntary system to enable you to designate an inventory attorney. The following checklist will help begin the process.

The Designated Inventory Attorney Program checklist:

1. Considerations in Selecting an Designated Inventory Attorney
  - a. Select a licensed Ohio attorney whom you trust.
  - b. Discuss what will need to be done in the event you are unavailable.
  - c. Explain where to find important documents, files, and any other important information that may be specific to your practice.
  - d. Don't make your designated inventory attorney's job more difficult than necessary. This is a great time to scrutinize your records management and retention policies.
  - e. Your designated inventory attorney does not need to be a person capable of handling all of your outstanding cases. They simply need to be able to close down your practice.
  - f. Inform the BCBA, your office staff, and family of your designated inventory attorney selection.

2. Suggested Information to Share with Your Designated Inventory Attorney
  - a. Primary and satellite office addresses and access information
  - b. Staff names and duties
  - c. Landlord and lease information
  - d. Information on calendaring, billing, and case management systems
  - e. Passwords or where you keep them
  - f. Safe location, combination or where you keep it
  - g. Contact information for key vendors such as accountant, payroll service, insurance agent and IT consultant
  - h. Safety deposit box location
  - i. IOLTA and operating account numbers and location(s)
  - j. Professional liability insurance carrier and policy number
  - k. Office insurance carrier and policies
  - l. Location of active client files and archived files
  
3. How to Participate in the BCBA Designated Inventory Attorney Program
  - a. Download a copy of the inventory attorney designation form.
  - b. Complete the form in collaboration with your designated inventory attorney.
  - c. Do not attach additional documentation or submit confidential information on the form. All those items and their location should be shared with the Designated Inventory Attorney.
  - d. Provide a copy of the form to your Designated Inventory Attorney and submit your completed designation form to the BCBA by mail or email to [bcba@bcba-oh.org](mailto:bcba@bcba-oh.org).
  
4. This service is free to Butler County Bar Association members. Nonmembers may utilize this service for an initial filing fee of \$25, and \$10 for subsequent revisions.

The BCBA will maintain a record of your designated inventory attorney.

Questions? Please call (513) 896-6671

Butler County Bar Association  
1501 First Avenue  
Middletown, OH 45044

**Butler County Bar Association  
Designated Inventory Attorney**

**Designation of Inventory Attorney Form**

The attorneys named below wish to participate in the Designated Inventory Attorney Program. The Inventory Attorney designated below should be contacted in the event of the death, disappearance, disability, or leave of absence of the Designating Attorney.

*Please PRINT clearly or type.*

Name of **Designating Attorney** \_\_\_\_\_

Ohio Bar Number \_\_\_\_\_

Office Address \_\_\_\_\_

Office Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

Signature of Designating Attorney \_\_\_\_\_ Date \_\_\_\_\_

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Name of **Inventory Attorney** \_\_\_\_\_

Ohio Bar Number \_\_\_\_\_

Office Address \_\_\_\_\_

Office Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

Signature of Inventory Attorney \_\_\_\_\_ Date \_\_\_\_\_

***This designation is not intended to create a legally binding agreement.***

Please return your completed designation form to the BCBA by US mail or in person to 1501 First Avenue, Middletown, OH 45044, or scan and email to [bcba@bcba-oh.org](mailto:bcba@bcba-oh.org).

Questions? Please call (513) 896-6671

Butler County Bar Association  
1501 First Avenue  
Middletown, OH 45044

***Butler County Bar Association  
Butler County Bar Foundation Contribution – Fiscal Year 2024-2025***

Your name (print): \_\_\_\_\_

Yes, I would like to donate \$\_\_\_\_\_ to the Bar Foundation!

The Butler County Bar Foundation was formed in 2009 as a charitable arm of the Butler County Bar Association. The Butler County Bar Foundation is a tax-exempt charitable organization under IRC Section 501(c)(3). Its primary purpose is to promote and support legal education, affordable legal representation, and other charitable focuses. Once funds permit, the Foundation Board plans to create scholarships, sponsorships, and grants for our legal community.

The BCBA Bar Foundation has received several donations since its introduction. On behalf of the BCBA Bar Foundation Committee members, thank you for your thoughtfulness and generosity. The Butler County Bar Association Board of Directors passed a resolution which provides for a \$100 donation to the Bar Foundation in honor of any Bar Association member who passes away.

The directors of the foundation are Patricia J. Downing, Esq. of The Lampe Law Office LLC, Craig D. Havens, Esq. of Millikin & Fitton Law Firm, and Madalyn J. Fairbanks, Esq. of Singer & McCausland Co. LPA.

If you have any questions about the Bar Foundation, please contact:  
Patricia J. Downing, Esq. at [pdowning@llampelaw.com](mailto:pdowning@llampelaw.com) or (513) 889-0400.

Please make your check payable to the “**Oxford Community Foundation**” and mail to:

Butler County Bar Association  
1501 First Avenue  
Middletown, OH 45044

The Bar Foundation board members have agreed to keep its funds with the Oxford Community Foundation, which will invest and manage the funds for a very low administration fee for the benefit of our foundation.

***Butler County Bar Association  
Practice Section & Committee Request Form - Fiscal Year 2024-2025***

Your name (print): \_\_\_\_\_

Select your choices. Committees not listed are not open to all members or require appointment by the Board: Certified Grievance/Ethics, Nominating Board Officers, Personnel, and Audit/Accounting.

Return form to: BCBA, 1501 First Avenue, Middletown, OH 45044 Fax (513) 868-7022

Email: [bcba@bcba-oh.org](mailto:bcba@bcba-oh.org)

Will you consider serving as Chair for a section/committee?  No.  Yes. If yes, list choices:

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Please circle #'s below for your section and committee choices. You will **not** be included on a section or committee unless you complete this form, even if you were a member this past year.

**PRACTICE SECTIONS**

- |                           |                            |
|---------------------------|----------------------------|
| 1. Appellate Law          | 6. Family Law              |
| 2. Bankruptcy Law         | 7. Juvenile Law            |
| 3. Civil Litigation       | 8. Probate/Estate Planning |
| 4. Corporate/Business Law | 9. Real Estate Law         |
| 5. Criminal Law           |                            |

**COMMITTEES**

1. **Alternative Dispute Resolution** - organizes and plans alternative dispute resolutions.
2. **Bar Applicants Review** - interviews and screens local Ohio bar applicants.
3. **Bar Foundation** - manages and directs charitable work and services.
4. **Butler Senior Counselors Camaraderie Committee (BS-3C)** – provides experienced past and present members with a regular opportunity to meet, fellowship, mentor, and engage in such other activities as will preserve our history and promote camaraderie and friendship among our profession.
5. **Clerk of Courts** - serves as a liaison with the BC Common Pleas Clerk of Courts for suggested improvements and additional services.
6. **Court Rules** - serves as a liaison with the judges for suggested amendments and updates to the rules of all divisions of the BC Common Pleas Court and 12th District Court.
7. **Fee Arbitration Resolution** - holds fee arbitration hearings when both parties agree or referred by the Certified Grievance/Ethics Committee.
8. **Lawyer Education and Seminars** - approves and presents seminars of interest to members, coordinated as needed with Practice Sections.
9. **Lawyer Referral Service** - sets policies and rules, enforces these policies and rules, markets the service, and administers service for members, consistent with the Ohio Supreme Court requirements for operating a referral service.
10. **Membership** - seeks out and recommends ideas to retain/recruit members, provide appropriate member benefits and group rates in the areas of insurance, travel discounts, and equipment.
11. **Mock Trial** - promotes a mock trial program with local participating schools.
12. **Notary** - ensure Butler County Notaries Public follow the authority of Butler County Common Pleas Court Local Rule 3.10 and appropriate statues of the Ohio Revised Code.
13. **History, Memorial & Scholarship** - plans and coordinates appropriate memorials, scholarships, and any other activities as directed by the President. Makes Board approved public statements.
14. **Social Events and Outings** - plans variety of social events for members.
15. **Technology for Attorneys** - assists and recommends office operations and services improvements for the benefit of members.
16. **Unauthorized Practice of Law** - holds hearings on the unauthorized practice of law when directed by the Board or Certified Grievance/Ethics Committee.
17. **Young Lawyers Interests** - plans and organizes educational and social activities for members licensed less than ten years.

***Butler County Bar Association***  
***Directory Fields of Practice – Fiscal Year 2024-2025***

Your name (print): \_\_\_\_\_

Return this form if you want to be included in the “Lawyer to Lawyer” referral list we distribute to members. Your listing is free as a current member. Because members designate their fields of practice, a disclaimer in the “Lawyer to Lawyer” list will state these are member self-designations and are not based on any review or selection by the BCBA or the Supreme Court of Ohio. Still, for our membership’s benefit, please only select fields in which you have over 4 years of significant practice experience.

**Fields of Practice**

- |  |  |
|--|--|
| <input type="checkbox"/> Administrative                  | <input type="checkbox"/> Family Law/DR Court                                     |
| <input type="checkbox"/> Adoption                        | <input type="checkbox"/> Family Law/DR Court Ham Co                              |
| <input type="checkbox"/> Alternative Dispute Resolution  | <input type="checkbox"/> Franchise   |
| <input type="checkbox"/> Antitrust & Trade Regulation    | <input type="checkbox"/> Health Care & Hospital                                  |
| <input type="checkbox"/> Appellate Practice/Civil        | <input type="checkbox"/> Immigration   |
| <input type="checkbox"/> Appellate Practice/Criminal     | <input type="checkbox"/> Insurance   |
| <input type="checkbox"/> Banking & Finance               | <input type="checkbox"/> Juvenile Law/Court                                      |
| <input type="checkbox"/> Bankruptcy                      | <input type="checkbox"/> Juvenile Law/Court Ham Co                               |
| <input type="checkbox"/> Civil Rights and Discrimination | <input type="checkbox"/> Landlord/Tenant—Tenants                                 |
| <input type="checkbox"/> Civil Litigation—Municipal      | <input type="checkbox"/> Landlord/Tenant—Landlords                               |
| <input type="checkbox"/> Civil Litigation—Common Pleas   | <input type="checkbox"/> Liquor  |
| <input type="checkbox"/> Civil Litigation—Ham Co Courts  | <input type="checkbox"/> Medicaid – Eligibility                                  |
| <input type="checkbox"/> Civil Service/Govt Admin        | <input type="checkbox"/> Municipal & Government                                  |
| <input type="checkbox"/> Collection Law-Creditor         | <input type="checkbox"/> Negligence/Personal Injury—<br>auto/motor vehicle       |
| <input type="checkbox"/> Collection Law-Debtor           | <input type="checkbox"/> Negligence/Personal Injury—<br>misc/others              |
| <input type="checkbox"/> Commercial                      | <input type="checkbox"/> Non-Profit Corporation                                  |
| <input type="checkbox"/> Computer/E-Commerce             | <input type="checkbox"/> Probate Law/Court                                       |
| <input type="checkbox"/> Construction                    | <input type="checkbox"/> Product Liability                                       |
| <input type="checkbox"/> Consumer Protection             | <input type="checkbox"/> Professional Negligence<br>Malpractice (Legal)          |
| <input type="checkbox"/> Contracts                       | <input type="checkbox"/> Professional Negligence<br>Malpractice (Medical/Dental) |
| <input type="checkbox"/> Copyright/Trademark/Patent      | <input type="checkbox"/> Public Contract/Utilities                               |
| <input type="checkbox"/> Corporate & Business            | <input type="checkbox"/> Real Estate, Land, Zoning                               |
| <input type="checkbox"/> Criminal—Felonies               | <input type="checkbox"/> School and Student Issues                               |
| <input type="checkbox"/> Criminal—Misdemeanors           | <input type="checkbox"/> Securities  |
| <input type="checkbox"/> Criminal—Hamilton Co Courts     | <input type="checkbox"/> Sexual Abuse & Incest                                   |
| <input type="checkbox"/> Domestic Violence/CPO           | <input type="checkbox"/> Social Security   |
| <input type="checkbox"/> DUI/OVI & Traffic               | <input type="checkbox"/> Taxation and IRS  |
| <input type="checkbox"/> Elder                           | <input type="checkbox"/> Workers’ Compensation                                   |
| <input type="checkbox"/> Employee Benefits/Pension       | <input type="checkbox"/> Wrongful Death  |
| <input type="checkbox"/> Employment/Labor                | <input type="checkbox"/> Wrongful Termination                                    |
| <input type="checkbox"/> Estate Planning, Wills, Trusts  |  |
| <input type="checkbox"/> False Claims Act                |  |

**Butler County Bar Association**  
**2024 Lawyer Referral Service (LRS) Application**

Name: \_\_\_\_\_ Supreme Ct. No: \_\_\_\_\_

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

\_\_\_\_\_

What days/hours is office staffed? \_\_\_\_\_

Branch office location(s): \_\_\_\_\_

What days/hours is branch staffed? \_\_\_\_\_

Office phone:(\_\_\_\_\_) \_\_\_\_\_ Cell phone:(\_\_\_\_\_) \_\_\_\_\_

Fax:(\_\_\_\_\_) \_\_\_\_\_ E-mail: \_\_\_\_\_

Website: \_\_\_\_\_ Year admitted to Ohio Bar: \_\_\_\_\_

Law School: \_\_\_\_\_ Graduation Date: \_\_\_\_\_

Your professional liability carrier: \_\_\_\_\_

Policy #: \_\_\_\_\_ Exp date: \_\_\_\_\_ (Attach copy of declaration page)

**Terms for acceptance as an LRS Attorney Participant**

Participation in the LRS is on a subscription basis. Monthly or annual subscriptions are available.

**For monthly subscriptions**, you agree to provide the Butler County Bar Association with a valid credit card account which will be charged the then applicable monthly subscription rate on the first business day of the month for each month of your participation in the program. Monthly subscriptions are automatically renewing on a month-to-month basis but you may cancel your subscription at any time upon written notice directed to the Butler County Bar Association Executive Director or his/her designee. Cancellations are effective the last day of the month following the month in which the written cancellation is submitted.

**For annual (12 consecutive months) subscriptions**, you agree to provide the Butler County Bar Association with a valid credit card account which will be charged the annual subscription rate. Your participation in the program will commence the first day of the month following receipt of your payment and continue for twelve (12) consecutive months ending on the last day of the twelfth month. Annual subscriptions will automatically renew at the then applicable annual rate but you may avoid automatic renewal by submitting written notice directed to the Butler County Bar Association Executive Director or his/her designee at least thirty (30) days prior to the end of your annual subscription period. An attorney may withdraw from LRS participation during their subscription year is not be entitled to a refund of any portion of the annual fee.



By completing and signing this application you certify that you reviewed and will fully comply with the LRS Rules and Procedures (attached and incorporated herein) and the terms and conditions of this application. You also certify that you are competent, qualified, and willing to handle all legal matters in the areas of law for which you elect to accept referrals through the LRS.

When selecting the areas of law for which you will be accepting LRS referrals be aware of the requirements of the Ohio Rules of Professional Conduct including:

*Professional Conduct Rule 1.1 Client-lawyer relationship.*

*A lawyer shall provide competent representation to a client. Competent representation requires the legal knowledge, skill, thoroughness, and preparation reasonably necessary for the representation.*

On determining competency to handle a matter referred to you through the LRS, please consider the definition of legal competence employed by the American Law Institute - American Bar Association Committee on Continuing Professional Education. The ALI-ABA definition states:

Legal competence is measured by the extent to which an attorney (1) is specifically knowledgeable about the fields of law in which he or she practices; (2) performs the techniques of such practice with skill; (3) manages such practice efficiently; (4) identifies issues beyond his or her competence relevant to the matter undertaken, bringing these to the client's attention; (5) properly prepares and carries through the matter undertaken; and (6) is intellectually, emotionally, and physically capable. Legal incompetence is measured by the extent to which an attorney fails to maintain these qualities.

You agree to indemnify and hold harmless the Butler County Bar Association (BCBA), the Lawyer Referral Service (LRS), and their officers, agents, and employees from any and all liability and costs attendant thereto (including fees for representation and other litigation expenses) arising out of your subscription to and participation in the LRS.

The Butler County Bar Association may conduct random audits and research of referrals made through the LRS program for marketing purposes, data collection, and to verify compliance with the terms and conditions of the program. You agree to fully cooperate with these audits and research. You indicate by your signature on this application acceptance of the above stated terms and conditions as an LRS participant, including the separate Rules and Procedures.

Your Signature: \_\_\_\_\_ Date signed: \_\_\_\_\_

LRS Committee Approval: \_\_\_\_\_ Date signed: \_\_\_\_\_

**YES!** I want to participate in the Butler County Bar Association Lawyer Referral Service Program.

I want to participate in the LRS as a (choose one only)

**Basic Monthly Subscriber at \$35.00 per month.**

The Basic Monthly Subscription Program includes month-to-month participation in an unlimited number of categories\* excluding Domestic/Family Law, Negligence/Tort Law, Probate Law, and Real Estate Law.

**Premium Monthly Subscriber at \$50.00 per month.**

The Premium Monthly Subscription Program includes month-to-month participation in an unlimited number of categories\* including Domestic/Family Law, Negligence/Tort Law, Probate Law, and Real Estate Law.

**Basic Annual Subscriber at \$359.00 per year. SAVE 15%**

The Basic Annual Subscription Program includes a full twelve calendar months of participation in an unlimited number of categories\* excluding Domestic/Family Law, Negligence/Tort Law, Probate Law, and Real Estate Law.

**Premium Annual Subscriber at \$499.00 per year. SAVE 17%**

The Premium Monthly Subscription Program includes a full twelve calendar months of participation in an unlimited number of categories\* including Domestic/Family Law, Negligence/Tort Law, Probate Law, and Real Estate Law.

*\*Available referral categories of law on back of page*

**Your only cost to participate is the monthly or annual subscription price  
Attorney participants now keep ALL INCOME generated by LRS referrals!**

However, because of the nature of the program, the Butler County Bar Association is unable to guarantee the number of referrals you will receive or the amount of income you will earn as a subscriber

Credit Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Name on Card: \_\_\_\_\_ Security Code: \_\_\_\_\_

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

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