



# WESTERN CONFERENCE OF TEAMSTERS LEGAL SERVICES TRUST FUND

P.O. Box 2340 | Stockton, CA 95201 | (209) 940-5250

## LAW FIRM QUESTIONNAIRE

**NOTE:** The term “Law Firm” includes sole practitioners, partnerships, professional corporations, etc.

### I. IDENTIFICATION

Name of Law Firm \_\_\_\_\_

Address (including zip code and county) and telephone number (include area code) of principal office

\_\_\_\_\_  
\_\_\_\_\_

Address (including zip code and county) of other offices:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### II. ATTORNEYS

Please provide the following information for each attorney in the law firm who would provide legal services to the members of our prepaid legal plans; attach a separate page for each attorney.

Name \_\_\_\_\_

Office Address (include zip code and county) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Legal Education (Law School from which degree(s) received and date awarded)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



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### Bar Admissions

State \_\_\_\_\_ Date \_\_\_\_\_

State \_\_\_\_\_ Date \_\_\_\_\_

State \_\_\_\_\_ Date \_\_\_\_\_

U.S. District Court (Identify) \_\_\_\_\_

Date \_\_\_\_\_

Other \_\_\_\_\_ Date \_\_\_\_\_

Years of practice in this community \_\_\_\_\_

Have you ever been reprimanded, censured, suspended or otherwise disciplined by any bar or court?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, describe the circumstances. (Attach separate page, if necessary)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**All questions in this section require an answer (n/a is not an acceptable answer):**

Do you carry malpractice insurance? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, how much? \_\_\_\_\_

Name of Carrier: \_\_\_\_\_

Number of claims made against your malpractice insurance during the 60 months immediately preceding the date of this application: \_\_\_\_\_

Number of claims on which your malpractice insurer has paid any amount to the claimant, either before or after suit was filed: \_\_\_\_\_

Languages spoken: \_\_\_\_\_



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### III. AREA OF PRACTICE

Answer the following for each attorney listed in Part II

Indicate the percentage of your professional and business activity that is spent in the private practice of law. \_\_\_\_\_

Please indicate whether you have handled any cases in the following categories in your private practice of law in the past two (2) years:

#### A. Wills and Probate

Preparation of wills including trusts \_\_\_\_\_

Probate proceedings \_\_\_\_\_

Administration proceedings \_\_\_\_\_

#### B. Domestic Relations

Uncontested divorces \_\_\_\_\_

Contested divorces \_\_\_\_\_

Separation agreements \_\_\_\_\_

Adoptions \_\_\_\_\_

Guardianships \_\_\_\_\_

Other family matters including nonsupport, alimony, name changes

\_\_\_\_\_

#### C. Criminal

Defense of misdemeanors \_\_\_\_\_

Defense of felonies \_\_\_\_\_

Defense of juvenile offenses \_\_\_\_\_



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D. Tax

IRS audits and other administrative proceedings \_\_\_\_\_

Litigation of federal, state or local claims to taxes \_\_\_\_\_

State returns \_\_\_\_\_

E. Administrative Proceedings

Social Security claims \_\_\_\_\_

Veterans Administration \_\_\_\_\_

Motor Vehicle \_\_\_\_\_

Crime Victim Compensation \_\_\_\_\_

Federal Aviation Administration \_\_\_\_\_

Immigration and Naturalization Service \_\_\_\_\_

F. Civil Litigation

Personal Injury \_\_\_\_\_

Garnishment \_\_\_\_\_

Consumer Transactions \_\_\_\_\_

Small Claims Court \_\_\_\_\_

G. Housing and Real Estate

Landlord/Tenant Matters: For Landlord \_\_\_\_\_

For Tenant \_\_\_\_\_

Real Estate Transactions: Commercial \_\_\_\_\_

Non-Commercial \_\_\_\_\_

Mortgage Refinancing \_\_\_\_\_

Building Contracts \_\_\_\_\_

Quiet Titles \_\_\_\_\_

Foreclosures \_\_\_\_\_



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H. Financial Counseling

Joint Bankruptcy \_\_\_\_\_

Individual Bankruptcy \_\_\_\_\_

Out of Court Settlements \_\_\_\_\_

Wage Earner Petition \_\_\_\_\_

Out of Court Arrangements \_\_\_\_\_

I. Traffic

Defense of moving violations \_\_\_\_\_

Defense of equipment violations \_\_\_\_\_

Defense of other traffic violations other than parking violations \_\_\_\_\_

J. Other (specify)

\_\_\_\_\_  
\_\_\_\_\_

List the number and type of jury or bench trials you have handled in the last two (2) years:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

List continuing legal education programs in which you have participated in the last two (2) years:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



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In which of the above areas (A through K) do you have particular expertise and why?

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#### IV. GEOGRAPHIC SERVICE AREA

Indicate the geographic area for which each office of the law firm would be able to provide legal services to Plan participants (i.e., in a particular city or county; in several cities or counties; anywhere in the state; in several states, etc.):

Office Address

Geographic Area

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

If there is only one office location, how many miles (in radius) would you be willing to cover?

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#### V. REPRESENTATION BY LAW FIRM

Has the law firm ever participated in a prepaid or other group legal services program?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, provide the name of the program, dates of participation, and a description of the extent of participation.

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Has the law firm ever represented or advised any of the following organizations or officers or officials thereof?

Western Conference of Teamsters                      Yes \_\_\_\_\_                      No \_\_\_\_\_

W.C.T. Locals    Yes \_\_\_\_\_                      No \_\_\_\_\_

A party adverse to the W.C.T. Locals  
in any proceeding    Yes \_\_\_\_\_                      No \_\_\_\_\_

If yes to any of the above, describe the nature of the case and the most recent date of such representation:

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State any other information which you believe makes your law firm particularly qualified to participate in prepaid legal services plans (such as relevant work experience, community activities, etc.):

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\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date