



The Florida Bar  
Business Law Section  
Member & Law Student  
Mentorship Programs Handbook

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## **Mission Statement**

The Business Law Section of the Florida Bar ("BLS") Mentorship Programs are designed to provide:

- Membership exposure, guidance and encouragement to members of the BLS who are recent law school graduates, newly practicing attorneys, or attorneys changing the scope of their practice; and
- Membership exposure, guidance and encouragement to law students interested in practicing business law in Florida and/or learning more about the BLS, and rendering assistance, when requested, in dealing with the rigors of the bar examination process.

in order to promote awareness, understanding, appreciation, and application of the principles of law including the importance of ethical conduct and professionalism. The court system, The Florida Bar, the BLS, and the public will benefit from this effort, as mentees gain greater insight into the practice of business law and both mentors and mentees become more involved with the BLS.

## **GOALS OF THE MENTOR - MENTEE RELATIONSHIP**

The primary functions of the BLS Mentorship Programs are to promote involvement in the BLS and to provide meaningful insight into the various practice areas of business law in Florida.

A successful mentor is someone who is a good person first and a great lawyer second; someone who seeks knowledge and is guided by clear moral principles in both personal and professional levels. First and foremost, as a teacher, a mentor should also be a person who helps the mentee navigate the professional world and assists the mentee in making connections that will be valuable throughout the mentee's career. A mentor is responsible for managing mentor-mentee relationship, and should encourage the mentee to reach out with questions and for advice.

A successful mentee is someone who is motivated to be an exceptional lawyer, and who recognizes the need for constant improvement. The mentee must have love and respect for the profession, and should recognize that there is a human component to a lawyer's training which includes the kind of contact a true mentor can offer.

Mentors are given the opportunity to influence the way mentees interact with their colleagues and practice law, thus influencing the future of the profession. Mentees are given the opportunity to be molded by some of the finest business lawyers in Florida, in an atmosphere where candid yet confidential exchanges between the mentor and the mentee can take place.

## **Guidelines for Mentorships**

### A. Guidelines for Mentors:

A mentor must be a member in good standing of The Florida Bar and have been practicing law for a minimum of five (5) years (or less if approved by the Chair of the Section). The specific activities of a mentor will be guided by the curriculum found within this Handbook.

In order to facilitate a true mentor/mentee relationship, meetings or conferences should take place at least once every three (3) months. Generally speaking, the mentor should focus on facilitating the mentee's familiarity with and exposure to the practice of law and the BLS by:

1. Inviting the mentee to BLS events and introducing the mentee to the judiciary, court officials, and other lawyers and members of the BLS.
2. Providing a sounding board for the mentee to discuss practice and career related issues.
3. Advise the mentee on business development skills and tactics.
4. Assist the mentee in navigating the pitfalls and internal politics associated with practice in a law firm.
5. Providing law student mentees with pre-career guidance and counseling, including dealing with the rigors of bar examination preparation.
6. Introducing the mentee to the judiciary, court officials, and other lawyers and members of the BLS.

A mentor's role should introduce the mentee to business law (and specialized areas within business law), and to encourage participation in the BLS. The goal of the BLS Mentorship Programs is to facilitate an exchange of ideas, experiences and knowledge. Mentors should share their stories with mentees to help them both feel more comfortable with and learn from the mentor's good and bad experiences.

Both the mentor and mentee are cautioned that they should take appropriate steps to avoid even the appearance of the existence of any attorney/client relationship with each other's clients. Mentors and mentees

should keep in mind, and remind each other of the importance of client confidentiality, applicable privileges and client conflicts. Mentors and mentees should also remind each other that any detailed conversation about the specifics of a problem and/or situation involving a client might require prior consent from the client before making such disclosure. This also applies to any discussion or presentation of specific facts through hypotheticals in which the identity of any client is concealed.

The mentoring relationship is intended to provide general assistance, but it is not a means to provide mentees with answers to case specific questions or to relieve mentees from their own professional responsibilities and obligations. Likewise, mentors should not assist or advise mentees with personal legal matters or legal matters involving family or friends. The mentee is expected to make an independent professional evaluation of all advice received and should be instructed to advise his or her clients based solely upon the mentee's professional opinion, research, and evaluation. In no event shall the mentor be held liable for advice provided.

Although the mentoring relationship is a resource to enhance the mentee's professional development, it is not an internship, externship, or clerkship, and should not be treated as such. Any employment opportunities between a mentor and mentee are and should be kept completely outside of the BLS Mentoring Program. Although a mentor/mentee relationship may lead to the mentee's employment, the mentorship program is not intended to assist any mentees in obtaining any employment.

Ultimately, through the mentoring relationship, it is expected that all participants will enjoy enhanced career success, a greater realization of the importance of service to the community and the profession, and a consistent effort toward the ethical and competent practice of law.

#### B. Guidelines for Mentees:

In order to facilitate the effective and efficient realization of the BLS Mentoring Programs' goals, mentees should be available to meet and/or confer with their mentors every three (3) months. Such meetings should be held in person whenever possible. The mentee is expected to prepare for meetings with the mentor by preparing specific questions and/or issues to raise and discuss during mentoring meetings.

The mentee should recognize that any disclosure of the specifics of a problem or situation might implicate the attorney-client privilege and confidentiality obligations prescribed by the Rules of Professional Conduct of the Rules Regulating The Florida Bar. Mentees are encouraged to inquire of and discuss with mentors the importance of client confidentiality and client conflicts.

Mentees should make their best effort to pose questions or inquiries to avoid disclosing client identities and to avoid any potential conflicts of interest, bearing in mind however, that disclosure of specific factual situations may have ethical implications. Mentees are encouraged to ask questions regarding substantive, practical, and ethical issues which they may encounter, regardless of how elementary the mentee might view the inquiry. Mentors and mentees should recognize that there is no such thing as a stupid question.

Mentees are expected to treat mentors with customary professionalism and respect. Although mentors will work to make themselves available to advise mentees as needed, mentees must exercise consideration and discretion regarding the use of the mentor's time. Ultimately, it is envisioned that the mentoring relationship will result in significant enhancement in the mentee's character, competence, and commitment to the ideals of the legal profession. A mentee who is open and eager to receive ideas on the practice of law will enjoy the greatest success and benefit from the mentoring relationship.

## **PROCEDURES**

1. BLS members who a) are members in good standing of The Florida Bar, and b) have practiced law for a minimum of five (5) years (or less if approved by the Chair of the BLS), may volunteer to serve as mentors through the Program. To register, mentors must complete the registration form contained in this Handbook. Mentors may also access the registration form through the BLS website ([www.flabizlaw.org](http://www.flabizlaw.org)). The BLS Mentoring Committee will pair the mentor with a mentee.
2. BLS members who a) are members in good standing of the Florida Bar, and b) have practiced business law for less than five (5) years (or more if approved by the Chair of the BLS), may apply for a mentor through the Program. To apply, member mentees must complete the registration form contained in this Handbook. Member mentees may also access the registration form through the BLS website ([www.flabizlaw.org](http://www.flabizlaw.org)). The BLS Mentoring Committee will pair the member mentee with a mentor.
3. Law students who a) are enrolled in an accredited law school, and b) register as student members of the BLS, may apply for a mentor through the Program. To apply, law student mentees must complete the registration form contained in this Handbook. Law student mentees may also access the registration form through the BLS website ([www.flabizlaw.org](http://www.flabizlaw.org)). The Chair of the BLS will review the application and, if approved, the BLS Mentoring Committee will pair the law student mentee with a mentor.
4. It is the mentor's responsibility to make initial contact with the mentee and to establish a regular meeting schedule amenable to both. A curriculum of issues to be addressed, as appropriate (depending on whether the mentee is a BLS member or a law student) is contained within this Handbook.
5. It is recommended that the mentoring relationship be continued for a minimum of one year. Informal extension of the relationship which may naturally occur is a matter solely between the mentor and mentee.



**BLS MENTORSHIP PROGRAM: MENTOR REGISTRATION FORM**

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

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

Practice Area(s): \_\_\_\_\_

Years Practicing: \_\_\_\_\_ Florida Bar No.: \_\_\_\_\_

Hobbies or Interests: \_\_\_\_\_

\_\_\_ I am interested in mentoring a new business lawyer who practices in the following area(s):

- |                          |                          |
|--------------------------|--------------------------|
| a) Business Litigation   | b) Bankruptcy/UCC        |
| c) Antitrust             | d) Intellectual Property |
| e) Business Transactions | f) Tax Law               |
| g) Employment Law        | h) Other _____           |

If you would like multiple mentees, please indicate how many: \_\_\_\_\_

\_\_\_ I am interested in mentoring a law student from the following program(s) (circle all that apply): Ave Maria, Barry University, Florida A&M University, Florida Coastal, Florida International University, Florida State University, Nova Southeastern University, St. Thomas University, Stetson University, University of Florida, University of Miami, Other \_\_\_\_\_.

who is interested in the following type(s) of business law (circle all that apply):

- |                          |                          |
|--------------------------|--------------------------|
| a) Business Litigation   | b) Bankruptcy/UCC        |
| c) Antitrust             | d) Intellectual Property |
| e) Business Transactions | f) Tax Law               |
| g) Employment Law        | h) Other _____           |

If you would like multiple mentees, please indicate how many: \_\_\_\_\_

I certify that I am a member in good standing of The Florida Bar and will abide by the policies set forth in the BLS Member & Law Student Mentorship Programs Handbook.

Signed: \_\_\_\_\_

Name (Print): \_\_\_\_\_ Date: \_\_\_\_\_

**BLS MENTORSHIP PROGRAM: MEMBER MENTEE REGISTRATION FORM**

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

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

Former Practice Area(s): \_\_\_\_\_

Current Practice Area(s): \_\_\_\_\_

Geographical Location: \_\_\_\_\_

Years Practicing: \_\_\_\_\_ Florida Bar No.: \_\_\_\_\_

Hobbies or Interests: \_\_\_\_\_

I am interested in being mentored by a BLS member who practices in the following area(s): (circle all that apply)

- |                          |                          |
|--------------------------|--------------------------|
| a) Business Litigation   | b) Bankruptcy/UCC        |
| c) Antitrust             | d) Intellectual Property |
| e) Business Transactions | f) Tax Law               |
| g) Employment Law        | h) Other _____           |

I certify that I:

- \_\_\_ Am a member in good standing of the Florida Bar; and
- \_\_\_ Have not practiced business law in Florida for more than five (5) years or have been approved by the Chair of the BLS to be a mentee,

and I will abide by the policies set forth in the BLS Member & Law Student Mentorship Programs Handbook.

Signed: \_\_\_\_\_

Name (Print): \_\_\_\_\_ Date: \_\_\_\_\_

**BLS MENTORSHIP PROGRAM: LAW STUDENT MENTEE REGISTRATION FORM**

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

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

Law School Attending: \_\_\_\_\_

Current Law School Level (please circle one): 1L 2L 3L

Anticipated Geographical Practice Area (if known): \_\_\_\_\_

Hobbies or Interests: \_\_\_\_\_

\_\_\_\_\_

I am interested in the following area(s) of business law: (circle all that apply)

- |                          |                          |
|--------------------------|--------------------------|
| a) Business Litigation   | b) Bankruptcy/UCC        |
| c) Antitrust             | d) Intellectual Property |
| e) Business Transactions | f) Tax Law               |
| g) Employment Law        | h) Other _____           |

I certify that I:

\_\_\_ Am a second (2L) or third (3L) year law student enrolled in an accredited Florida law school; and

\_\_\_ Am a student member of the BLS or have enclosed my application for student membership in the BLS (together with any applicable fees),

and I will abide by the policies set forth in the BLS Member & Law Student Mentorship Programs Handbook.

Signed: \_\_\_\_\_

Name (Print): \_\_\_\_\_ Date: \_\_\_\_\_

## Member Mentoring Curriculum

### **I. Substantive Legal Mentorship**

- A. Essentials of the Practice (to be determined by the mentor within the practice area chosen)
  - 1. Common Legal Principles and New Developments
  - 2. Research
  - 3. Oral Advocacy
  - 4. Effective Legal Writing

### **II. Character**

- A. Professionalism:
  - 1. Relations with other lawyers (including associates, co-counsel, and opponents)
  - 2. Local procedures and customs/"unwritten rules"
  - 3. Civility, integrity and judgment
- B. Ethics:
  - 1. Engaging in business with clients
  - 2. The duty to report ethics violations
  - 3. Recognizing professional limitations
  - 4. Communication
  - 5. Fees
  - 6. Confidentiality
  - 7. Conflicts of interest (current and former client)
  - 8. Trust account procedures and obligations
  - 9. Candor
  - 10. Fairness to opposing party and counsel

- C. Obligations to Clients
- D. Obligations to The Bar
- E. Obligations to The Court
- F. How to Identify Conflicts
- G. Balancing Life and the Practice of Law
- H. The Humane Approach to the Practice (financial and non-financial rewards)
- I. Self-Help Awareness (Florida Bar programs addressing substance abuse, Florida Lawyers Assistance, etc.)
- J. Confidentiality
- K. The Bar Disciplinary System

### **III. Competence**

- A. Office Procedure and General Orientation:
  - 1. Office economics:
    - i. practical aspects (such as overhead, etc.)
    - ii. billable hours and time management
  - 2. Office technology:
    - i. availability of valuable resources/books
    - ii. office supply source availability
    - iii. computers (hardware and software)
    - iv. internet
  - 3. Hiring support staff
  - 4. Locating an office
  - 5. How to collect fees/retainers
- B. Where to go to seek assistance (SCOPE, fellow attorneys)

C. Courtroom Decorum

D. Courthouse Orientation:

1. If relevant, escort mentee to courthouse and introduce him/her to members of judiciary

E. Courthouse Procedures

F. Non-Courtroom Decorum and Practices:

1. Public addresses
2. Advertising
3. Dealing with adversaries
4. Dealing with clients
5. Alternative dispute resolution(s)
6. Establishing fees
7. Accepting/selecting cases and clients (how to say "no")

G. How and When to Refer and Accept Referrals

H. Organization of Files and Records

I. Handling Trust Accounts and Client Funds

J. Sources of Business and Their Cultivation/ Marketing

K. Importance of Attention and Responsiveness to Clients

L. Continuing Legal Education

M. Real Life Experiences/War Stories

N. Evaluating Cases

O. Malpractice.

#### **IV. Commitment**

A. Pro Bono Work

B. Florida Bar Involvement

C. Business Law Section Involvement:

1. Meet at mentor's law office for introduction to other lawyers there
2. Attend a BLS meeting together
3. Introduction to other lawyers in the community and BLS members

D. Community Activism

E. Duty to The Bar

F. Obligation to Give Back to Community

V. Dealing with the rigors of Bar examination preparation

## Law Student Mentoring Curriculum

### **I. Substantive Business Law Principles**

- A. Essentials of the Practice (to be determined by the mentor within the business law area of interest)
  - 1. Common Practice Strategies
  - 2. "Unwritten" Rules of Practice
  - 3. Geographical Considerations

### **II. Practice Considerations**

- A. Law Firms
- B. Solo Practice
- C. Where to go to seek assistance (SCOPE, fellow attorneys)
- D. Sources of Business/Cultivation
- E. How and When to Refer and Accept Referrals
- F. Importance of Attention and Responsiveness to Clients
- G. Real Life Experiences/War Stories

### **III. Character**

- A. Professionalism:
  - 1. Relations with other lawyers (including associates, co-counsel, and opponents)
  - 2. Civility, integrity and judgment
- B. Ethics:
  - 1. Engaging in business with clients
  - 2. The duty to report ethics violations
  - 3. Recognizing professional limitations
  - 4. Communication



5. Fees
  6. Confidentiality
  7. Conflicts of interest (current and former client)
  8. Trust account procedures and obligations
  9. Candor
  10. Fairness to opposing party and counsel
- C. Obligations to Clients
  - D. Obligations to The Bar
  - E. Obligations to The Court
  - F. How to Identify Conflicts
  - G. Balancing Life and the Practice of Law
  - H. The Humane Approach to the Practice (financial and non-financial rewards)
  - I. Self-Help Awareness (Florida Bar programs addressing substance abuse, Florida Lawyers Assistance, etc.)
  - J. Confidentiality
  - K. The Bar Disciplinary System

#### **IV. Commitment**

- A. Pro Bono Work
- B. Florida Bar Involvement
- C. Business Law Section Involvement:
  1. Meet at mentor's law office for introduction to other lawyers there
  2. Attend a BLS meeting together
  3. Introduction to other lawyers in the community and BLS members
- D. Community Activism