

WI FACETS POLICY

Title or Subject: Management Policy – Unauthorized Practice of Law

Date Effective: 2/14/04

Revised:

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UNAUTHORIZED PRACTICE OF LAW

The following policy pertains to agency conduct, staff, contracted individuals and volunteer conduct and training related to the unauthorized practice of law.

WI FACETS Agency Conduct:

1. WI FACETS, Inc. is not a law firm or legal services agency.
2. WI FACETS, Inc. will not provide any type of services that may be construed as practicing law, including but not limited to: giving legal advice, drafting legal documents or representing individuals/families in any type of legal proceeding.
3. WI FACETS, Inc. will provide its staff members, contracted individuals, and volunteers with regular, appropriate training concerning the unauthorized practice of law.
4. WI FACETS, Inc. will provide staff members, contracted individuals, and volunteers with unauthorized practice of law disclaimers that may be read to callers and meeting participants.
5. WI FACETS, Inc. will include a disclaimer on its website advising viewers that the information contained on the website is not a substitute for legal advice or representation.
6. WI FACETS, Inc. will include a standard disclaimer on its records authorization form cover letter.
7. WI FACETS, Inc. will make continuing efforts to build a roster of attorneys who are available to take legal referrals from WI FACETS, Inc. on a pro bono or reduced fee basis.

Staff, Contracted Individuals and Volunteer Conduct:

1. Staff members, contracted individuals and volunteers will not provide any type of services that may be construed as practicing law, including but not limited to: giving legal advice, drafting legal documents, or representing individuals/families in any type of legal proceeding.
2. Staff members, contracted individuals and volunteers will attend not less than one training per year concerning the unauthorized practice of law.
3. Staff members, contracted individuals and volunteers will use the unauthorized Practice of law disclaimers that WI FACETS, Inc. provides to them.
4. Staff members, contracted individuals and volunteers will make legal referrals, using the roster of attorneys provided to them, when necessary.

Training:

1. WI FACETS, Inc. will provide training to its staff members, contracted individuals, and volunteers, at least one time per year, concerning the unauthorized practice of law.
2. Unauthorized practice of law trainings, which are sponsored by WI FACETS, Inc. will be performed by a licensed attorney.
3. A copy of Wisconsin's current law concerning the unauthorized practice of law or practicing law without a license shall be provided to training participants.

THIS POLICY SHALL BE REVIEWED AT LEAST ANNUALLY BY THE BOARD.