



# NEW MEMBER INFORMATION GUIDE



## A WORD FROM OUR EXECUTIVE DIRECTOR

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I would like to personally welcome you to the Alabama State Bar. Whether you just passed the bar or you are transferring from another state, you are now a part of our over-19,000 members. Being a lawyer is a great privilege that comes with enormous responsibility. The values that guide the state bar are trust, integrity, and service, and as a member of the Alabama State Bar, we expect you to uphold these values.

Through reading this informational guide, you can learn more about what the bar offers to you and what you can offer to the bar. We hope that you will take advantage of the many benefits, resources, and discounts offered to our members.

The Alabama State Bar is here to assist you in any way that we can. Please do not hesitate to reach out to us regarding any question or concern that you may have. We are here for you and want to help you build a career of which you will be proud.

Congratulations and welcome to the Alabama State Bar!

Terri B. Lovell



Executive Director



# THE ALABAMA STATE BAR

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The Alabama State Bar (ASB) is the licensing and regulatory organization for lawyers in Alabama. ASB programs and activities have continuously served the public and improved the justice system. It is dedicated to promoting the professional responsibility and competence of its members, improving the administration of justice, and increasing the public understanding of and respect for the law.

## LOCATION



415 Dexter Avenue  
Montgomery, AL 36104

## CONTACT US



(334) 269-1515

## OUR VALUES

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## ASB STRUCTURE

Although the Alabama State Bar is subject to certain legislative controls relating to its fiscal operations, the board of bar commissioners exercises a judicial function under state law in administering the Alabama Supreme Court's rules and is subject to its oversight.

The board of bar commissioners is composed of 76 members, drawn from every judicial circuit in the state. A list of the current bar commissioners is available [here](#).

The board of bar commissioners is directed by the Executive Council, made up of the ASB president, immediate past president, president-elect, vice president, secretary/executive director, and four members at large chosen from the board.

## 2023–2024 OFFICERS

<b>President</b> .....	Fred G. Helmsing, Jr.
<b>President-Elect</b> .....	Jana Garner
<b>Vice President</b> .....	Jeff Bowling
<b>Secretary/Executive Director</b> .....	Terri Lovell
<b>Immediate Past President</b> .....	Tom Perry

## STAFF

The staff implements decisions of the commission in the administration of state bar business and assists members in carrying out their mandatory and voluntary activities. A list of staff members is available [here](#).

# KEEPING YOU INFORMED

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## SOCIAL MEDIA

Follow the @AlabamaStateBar on Facebook, Instagram, Twitter, and LinkedIn to stay up to date.

## THE ALABAMA LAWYER

A quarterly publication of the Alabama State Bar

## THE SIDEBAR E-NEWSLETTER

*The Sidebar* is a weekly e-newsletter sent to all members of the bar every Monday afternoon. To make sure you are subscribed to *The Sidebar*, log into your member portal and go to “Communication Preferences.” Here you can check and/or change your option to receive non-regulatory emails. Make sure it is yes.

## WEBSITE

The bar’s website is continually updated with a wealth of information accessible to both bar members and the public. The member search for contact information, online classifieds, contact information for judicial officials, formal ethics opinions, and information on bar programs are just a few of the things available on the bar’s website. When you log into your personalized profile page, you can access your MCLE transcript, print a certificate of good standing, print your bar card, update your contact information, and pay your bar dues in September. Be sure to check out the events calendar for items of interest in your area! [www.alabar.org](http://www.alabar.org)

# PART I: RESPONSIBILITIES

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## Professional Responsibility

While the Supreme Court of Alabama retains ultimate authority to regulate the legal profession, the Alabama State Bar's Office of General Counsel serves as the court's arm to investigate and prosecute claims that a lawyer has violated the Rules of Professional Conduct. Read the Alabama Rules of Professional Conduct [here](#).

## Annual Invoice

- Annual renewal notices are sent out every September by email.
- Occupational License fee is \$300.
- Special Membership Dues are \$150.
- Both types of membership are subject to the mandatory \$25 Client Security Fund assessment (see page 9).
- Payments are due October 31.
- Late payments on Occupational Licenses are subject to a late fee of \$45.
- Failure to pay results in an administrative suspension, removing you from the role of attorneys in good standing.
- Anyone admitted after October 1 is not assessed the licensing fees until the beginning of the next licensing year.

## Types of Membership

### Occupational License

Required if in the active private practice of law in Alabama

### Special Membership

For those who wish to remain in good standing but are not engaged in the active private practice of law in Alabama

Electing to become voluntarily inactive means you are no longer a member in good standing. As the administrative process stands right now, the only thing you would need to do to reactivate your license would be to pay the appropriate fees at that time.



## Address Change

You are required to keep Membership Services informed of your current address, telephone number, and email address. All address changes must be submitted via your member portal on our website. After you log in, click the pencil icon to edit your information.

## Identification Numbers

Upon your admission, you are issued **two DIFFERENT** identification numbers.

### Alabama State Bar Identification Number

Members of the Alabama State Bar are automatically assigned a state bar identification number (bar ID). This number is used when reporting MCLE credit and paying license fees. Members may request their bar ID by emailing [ms@alabar.org](mailto:ms@alabar.org) or by contacting the Attorney Licensing Office at (334) 269-1515.

### Court Identification Code

You are also assigned a six-digit court identification code by the Administrative Office of Courts (AOC) that is to be used to track civil case filings, as well as other cases handled by each attorney. This number may be obtained by calling AOC at 1-866-954-9411 (option 1 and then option 3).

## AlaFile

For questions regarding AlaFile, please contact the Administration Office of Courts at 1-866-954-9411 (option 1 and then option 3).

## Copies of Admission Records and Bar Exam Scores

All requests for copies of scores on the bar exam must be directed to the National Conference of Bar Examiners (NCBE). If you need a copy of your Character & Fitness Questionnaire (application), please log into your original admissions portal. You will find a downloadable PDF link on your homepage.

## Mandatory Continuing Legal Education

As a member of the bar, you are subject to Alabama's Mandatory Continuing Legal Education (MCLE) Rules and Regulations. The full text of these rules and regulations may be found [here](#).

**A. You are exempt through December 31 of the year of your admission.** Attorneys are exempt from the annual MCLE requirement for the balance of the calendar year in which they were admitted.

**B. Thereafter, an attorney must earn at least 12 MCLE hours (including one hour of ethics) annually.** Beginning in January of the year following your admission, for any calendar year or portion in which you hold an occupational license, you must earn a minimum of 12 hours of approved MCLE credits annually (including one hour of ethics). A list of approved seminars may be found [here](#).

**C. You must complete the Mandatory Professionalism Course within one year of admission.** Alabama MCLE Rule 9 also requires new admittees to complete the three-hour Alabama Mandatory Professionalism Course within one year of admission to the bar. This seminar is administered by the University of Alabama (CLEAlabama) in even numbered years and Cumberland School of Law in odd numbered years. To register, contact CLEAlabama (1-800-627-6514) or Cumberland (1-800-888-7454).

**D. You may be eligible to claim an exemption from these requirements under MCLE Regulation 2.7.** Alabama MCLE Regulation 2.7 provides that any attorney who resides and maintains a principal office for the practice of law in another state that requires mandatory continuing legal education and who can demonstrate compliance with the MCLE requirements of his or her principal state of practice is exempt from these rules. If you believe you are eligible to claim this exemption, visit [here](#).



## **Client Security Fund Mandatory Annual Assessment**

The Client Security Fund was established by the Alabama State Bar to provide a remedy for clients who have lost money or other property, as a result of the dishonest conduct of practicing attorneys, by providing some reimbursement to clients whose money or property has been wrongfully taken by attorneys licensed to practice law in Alabama. The Alabama State Bar is authorized by Rule VIII of the Client Security Fund Rules to impose an annual fee of \$25 on each lawyer admitted in Alabama in order to support the Client Security Fund. Failure to pay this fee by the due date may result in summary suspension of an attorney's license to practice law. The full text of the Client Security Fund Rules can be found [here](#).

## **IOLTA Account Certification**

Alabama has a mandatory Interest on Lawyer Trust Accounts (IOLTA) program. An IOLTA account is a client trust account that pays interest to either the Alabama Law Foundation or the Alabama Civil Justice Foundation. Financial institutions remit the interest earned on lawyer trust accounts to your designated foundation which awards grants of these funds for law-related charitable purposes. Lawyers who hold any funds they receive on behalf of clients in separate client trust accounts must hold those funds in IOLTA accounts. Any bar member who purchases an occupational license is also required to annually certify that they either have an IOLTA account or are exempt from having an IOLTA account; if they have an IOLTA account, they must designate whether the interest earned on those funds is to be paid to the Alabama Law Foundation or the Alabama Civil Justice Foundation. IOLTA certification is done online and does not require a fee. Failure to certify your IOLTA account may result in summary suspension of your license to practice law. Read more about IOLTA accounts [here](#).

## PART II: BENEFITS

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### Legal Research

#### **Fastcase**

Fastcase is a free, internet-based legal research platform available to all Alabama State Bar members. In addition to Alabama case law, the Fastcase library includes federal case law, as well as statutes and regulations at both the state and federal levels.

For more information, including a library of free webinars, visit [fastcase.com](http://fastcase.com).

### Ethics Opinions

#### **Informal Ethics Opinions**

All ethics advice is non-binding and intended only to be informational. However, reliance on telephonic ethics advice may be considered as a mitigating factor in a disciplinary proceeding. Ethics counsel advises only on the inquiring lawyer's own prospective conduct. Inquiries are confidential unless the inquiring lawyer requests disclosure or a court orders disclosure. Call (334)269-1515. Visit [here](#) to learn more.

#### **Formal Ethics Opinions**

There is also a library of formal advisory ethics opinions available [here](#). Opinions are searchable by number, year issued, ethical rule, subject matter, or keyword.

## Alabama Lawyer Assistance Program

The ALAP provides immediate and continuing confidential help to lawyers, judges, and law students who suffer from addiction, depression, and other mental health issues. Services are strictly confidential. The sole aim of the program is recovery. Learn more [here](#). CONTACT: (334) 517-2238 • 24-hours at (334) 224-6920

## Trust Accounting for Alabama Attorneys

The Trust Accounting for Alabama Attorneys Handbook provides a general overview and answers commonly-asked questions about IOLTA accounts and includes information on setting up a trust account and establishing proper bookkeeping procedures. View the handbook [here](#).

There are also Trust Account Excel Workbooks available [here](#).

## Special ASB Benefits

### Visiting Lawyers' Offices and Conference Rooms

As an ASB member, you have full access to the bar's four conference rooms, as well as a visiting lawyer's office available for business or client use. Contact Michelle Shaw at [michelle.shaw@alabar.org](mailto:michelle.shaw@alabar.org)

## Classifieds

In addition to job openings, members may list positions wanted and will also find ads for office space available/wanted, items for sale/lease, items or services wanted, and services offered. You can post your own ad [here](#).

## Member Benefits

Alabama State Bar members have access to valuable educational programs and select discounts on products and services to benefit both your practice and work-life balance, as well as invaluable resources and information to enhance your professional success.

**View all discounts on products and services [here](#).**

## Insurance

### **ABA Retirement Funds**

The ABA Retirement Funds Program offers an employer-sponsored retirement plan, built by lawyers, powered by pros.

### **Alabama State Bar Blue Cross Blue Shield Association Health Plan (AHP)**

With our AHP, you have the ability to choose as many as three health options, two dental options, and the vision plan.

### **Blue Cross Blue Shield Health Insurance and MD Live**

This Blue Cross Blue Shield plan covers not only solo practitioners, but any employee of a solo practitioner or a firm, no matter the size.

### **ISI Cyber Liability Insurance**

The Enterprise Pro Cyber Liability Program protects businesses for the cost of an actual or suspected violation of a privacy regulation due to a security breach that results in the unauthorized release of protected personal identifiable information which is any private, non-public information of any kind in the merchants care, custody, or control.

### **ISI Major Medical, Life, Disability, Business Overhead, Umbrella and Other Insurance**

ISI Alabama, a division of Insurance Specialists, Inc. (ISI), a long-time sponsor of the Alabama State Bar, offers a variety of insurance programs.

**Learn more about these insurance plans [here](#).**

## PART III: PROFESSIONAL OPPORTUNITIES

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### Lawyer Referral Service

There are thousands of Alabamians of moderate means who have no idea how to find a lawyer and appear to underutilize attorneys. The Alabama State Bar Lawyer Referral Service is an ideal way to assist paying clients to locate a competent attorney who charges a reasonable fee to complete a legal task efficiently and in a timely manner.

The fee for membership is \$100 per year and includes up to 10 practice areas. Additional practice areas are available for \$5 each per year. Individuals joining the service on April 1 or later will be charged \$50 for the remainder of the fiscal year and will need to renew in September to remain in the service after September 30th. Charges will not be further prorated for those who join at other times of the year.

### Percentage Fee

To support the promotional activities of the service, LRS members agree to remit a percentage fee in large cases. The percentage fee is 5 percent of any fee between \$1,000 and \$6,000 received as a result of a referral from the service. For example, if a case generates a \$6,000 fee, the attorney would remit \$250 (5 percent of \$5,000). No remittance is required on fees of less than \$1,000 or on any portion of the fee over \$6,000. We regularly collect referral fees. Referral fees go back into the program to be used for promotion and program improvements.

Learn more or sign up [here](#).

## Networking

You can join one or more of the 31 sections. Learn more [here](#).

- Administrative Law
- Appellate Practice
- Bankruptcy and Commercial Law
- Business Law
- Business Torts and Antitrust
- Construction Industry
- Criminal Justice
- Disabilities Law
- Dispute Resolution
- Elder Law
- Elections, Ethics and Governance Relations
- Environmental Law
- Family Law
- Federal Court Practice
- Government Contracts
- Health Law
- In-House Counsel and Government Lawyers
- Intellectual Property, Entertainment and Sports Law
- International Law
- Labor and Employment Law
- Leadership Forum
- Litigation
- Non-Resident Members
- Oil, Gas and Mineral Law
- Real Property, Probate and Trust
- Senior Lawyers
- Solo & Small Firm
- Taxation Law
- Women's Section
- Workers' Compensation
- Young Lawyers

## Specialty Certification

An increasing number of lawyers are choosing to be recognized as having special knowledge and experience by becoming certified specialists in certain fields of law. Certifying organizations require lawyers to demonstrate special training, experience, and knowledge to ensure that recognition as a certified specialist is meaningful and reliable. Specialty certification programs available to lawyers are growing both in numbers and variety. Contact the American Bar Association for details regarding their certifying agencies.



## Volunteer Lawyers Program

The VLP offers you a simple, well-organized mechanism for fulfilling your professional responsibility to make legal counsel available to citizens. Equally important, our volunteer attorneys gain excellent client and courtroom experience since they are fully in charge of their pro bono cases. Cases accepted by volunteer attorneys are covered by the program's malpractice insurance.

Each year, thousands of Alabama lawyers donate their professional skills, time, and expertise to assist low-income families and individuals who cannot afford to hire a lawyer and would otherwise be unable to receive access to civil legal assistance. This pro bono work is critical for families living in poverty and highly fulfilling for the attorneys who provide the service.

Currently, Alabama has five Volunteer Lawyer Programs (VLPs):

[Alabama State Bar Volunteer Lawyers Program](#)

[Volunteer Lawyers Birmingham](#)

[Madison County Volunteer Lawyers Program](#)

[Montgomery Volunteer Lawyers Program](#)

[South Alabama Volunteer Lawyers Program](#)

We rely on the generosity and expertise of approximately 3,650 volunteer attorneys to fulfill our mission. By contributing even a small amount of your expertise, you could solve the life-shattering legal problems that confront many of the low-income persons living in our state. As we welcome you to the practice of law in Alabama, we hope that you will consider becoming a member of this community of service.

Please consider joining today with many of your peers who have already volunteered their services through these important programs.

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