

LAWYER REFERRAL CONSULTANT
APPLICATION INSTRUCTIONS

Before engaging in the capacity of a lawyer referral consultant, **a person must register** with the Utah Division of Consumer Protection. (Utah Code § 13-68-101 *et seq.*)

This **is a registration for an individual** acting as a lawyer referral consultant. All documents and information submitted must be in the name of the individual registering as a lawyer referral consultant and **not in the name of a corporation, limited liability company, or other entity.**

DOCUMENTS TO SUBMIT WITH THE APPLICATION FOR REGISTRATION

- A completed fingerprint card for the background check (**Initial registration only.**) (Utah Code § 13-68-203)
 - To complete the fingerprint card for the criminal background check, please go to your local police department or the Bureau of Criminal Investigation (BCI) located at 4315 South 2700 West Suite 1300, Taylorsville, UT 84129, and request to be fingerprinted. You are responsible for paying any fees associated with obtaining the fingerprint card. **Mail the completed fingerprint card to the Utah Division of Consumer Protection, 160 E. 300 S., PO Box 146704, Salt Lake City, UT 84114-6704.**

- EXHIBIT A
 - A copy of the notice to be displayed in the lawyer referral consultant's office. (Utah Code § 13-68-303)
 - A copy in English.

- EXHIBIT B
 - A copy of the disclosure statement provided to the lawyer referral consultant's clients. (Utah Code § 13-68-303)
 - A copy in English; and
 - A copy of the disclosure statement in *each* of the native languages of your clients.

- EXHIBIT C
 - A copy of the contract that the lawyer referral consultant will use with clients. (Utah Code § 13-68-301)
 - A copy in English; and
 - A copy of the contract in *each* of the native languages of your clients.

INFORMATION REQUIRED TO BE INCLUDED WITH THE FOLLOWING DOCUMENTS:
(Submitting documents without the required information identified below may result in delayed processing or rejection of the application for registration.)

EXHIBIT A

The Notice to be displayed in the lawyer referral consultant's office must be conspicuously displayed in the consultant's office and include the following: (Utah Code § 13-68-303)

- Shall be at least 12 by 20 inches;
- Boldface type or print;
- Each character at least one inch in height and width; and include:
 - the consultant’s full name and address;
 - the name of the company issuing the surety bond and bond number;
 - a statement that the lawyer referral consultant is not an attorney; and
 - the name of each lawyer referral consultant employed at each location.

EXHIBIT B

The written disclosure provided to the lawyer referral consultant’s clients must include the following: (Utah Code § 13-68-303)

- the lawyer referral consultant’s name, address, and telephone number;
- the lawyer referral consultant’s agent for service of process;
- the name of the company issuing the surety bond and bond number; and
- a list of the services the lawyer referral consultant provides, and the current and total fee for each service.

Example:

Form #	Description	Price/Fee	Additional costs	Total Fee
		\$	\$	\$

- A statement that the lawyer referral consultant obtained the client’s signature verifying that the client received the written disclosures before a service is provided.

Example: “ I _____[client] verify that I have received the written disclosures before receiving services from _____, my lawyer referral consultant.” Dated [day] of [month], [year], _____ [signature of client].

EXHIBIT C

The Contract Must Include the Following: (Utah Code § 13-68-301)

- A provision in **boldface type** on the **first** page of the contract, that states:
 - **“You may cancel this contract on or before midnight of the third business day after execution of the written contract. This excludes weekends, state holidays, and federal holidays.”**
- A statement provision in no less than 10 point font, in **boldface type** that states:
 - **“The lawyer referral consultant is not an attorney and may not perform the legal services that an attorney performs.”**
- State the purpose for which the lawyer referral consultant has been hired.
- State the one or more services to be performed and price for each service.

Example:

Select	Service To Perform	Price
<input type="checkbox"/>	[Service #1]	\$
<input type="checkbox"/>	[Service #2]	\$
<input type="checkbox"/>	[Service #3]	\$

- A provision stating, “You may report complaints related to a lawyer referral consultant to the Division of Consumer Protection, by calling toll-free at 1(800) 721-7233 or online at <https://dcp.utah.gov>.”

- A provision that states, “Any complaints concerning the unauthorized practice of law may be reported to the Utah State Bar, by calling (801) 531-9077 or online at www.utahbar.org.”

- A signature line for both the client and lawyer referral consultant to sign and date the contract.