

# Associate Member Application Form

## The College of the State Bar of Texas

**Eligibility.** Paralegals are entitled to join the College as Associate members. Please check the requirements and definition on the reverse to determine your eligibility.

### Application Information.

1. \_\_\_\_\_  
Your name as you would like it to appear on your certificate
2. \_\_\_\_\_  
Mailing address: street, city, state, Zip
3. \_\_\_\_\_  
Telephone number and fax number
4. \_\_\_\_\_  
Email address
5. \_\_\_\_\_  
Paralegal Division Membership Number, if applicable
6. \_\_\_\_\_  
Name and Bar Card number of supervising attorney

**Education requirement.** Please attach to this application a listing of the courses you have attended, showing (1) the title of the program, (2) the name of the organization sponsoring the program, (3) the names and firms of the speakers on the program, (4) a one-line description of the program, (5) the date of the program, (6) the length of the program rounded to the nearest quarter hour, and (7) the number of hours you were actually in attendance at the program.

**Certification of Applicant.** I certify that I have read the membership requirements on the reverse, that I attended the CLE hours shown on the attached statement, and that I meet all the qualifications of membership as defined on the reverse.

7. \_\_\_\_\_  
Signature of applicant

**Certification of Supervising Attorney.** I certify that applicant denoted above performs services for me as a paralegal, as defined on the reverse, and that the applicant is of good moral character.

8. \_\_\_\_\_  
Signature of supervising attorney

**Initial Membership Fee.** If you are a member in good standing of the Paralegal Division, State Bar of Texas, please attach your check for \$25 payable to the College of the State Bar of Texas. If you are not a member of the Paralegal Division but meet all the requirements of membership, please attach your check for \$50 payable to the College of the State Bar of Texas.

# Regulations Regarding Associate Members of the College of the State Bar of Texas

- I. Purpose.** In delivering the highest quality legal services to clients, the lawyer-paralegal team is an essential element. As the law develops, continuing legal education for paralegals is as important as it is for lawyers. Through associate member status, the College honors paralegals who make a commitment to maintain and enhance their professional skills through attending an extraordinary amount of continuing legal education hours. Requirements and benefits for associate members are the same as for lawyer members of the College except as set forth below.
- II. Membership Requirements for Associate Members.** A paralegal may become, or may maintain his/her status as an associate member of the College by (1) completing twenty (20) hours of approved CLE (3 of which must be in ethics) in the preceding calendar year, (2) paying the required fee, (3) submitting an application form on which a licensed Texas attorney verifies the applicant's good character and qualifications as a paralegal, and (4) submitting a report identifying the sponsor of the CLE programs attended, the specific topics included, the names and firms of speakers on the programs. Seven (7) of the twenty (20) hours may be earned through viewing approved videotapes or listening to approved audiotapes and submitting the necessary information for each.
- III. Definition of a Paralegal.** A paralegal is a person, qualified through various combinations of education, training, or work experience, who is employed or engaged by a lawyer, law office, governmental agency, or other entity in a capacity or function which involves the performance, under the ultimate direction and supervision of a licensed attorney, of specifically delegated substantive legal work, which work, for the most part, requires a sufficient knowledge of legal principles and procedures that, absent such person, an attorney would be required to perform the task.

**A. Support for Education, Training, and Work Experience:**

1. Attorneys are encouraged to promote paralegal attendance at CLE programs, paralegal specialty certification through the Texas Board of Legal Specialization, national certification through organizations such as the National Association of Legal Assistants or the National Federation of Paralegal Associations, and membership in the Paralegal Division of the State Bar and/or local paralegal organizations.

2. In hiring paralegals, attorneys are encouraged to consider: Specialty certification conferred by TBLS, a CLA/CP certification (NALA), a PACE certification (NFPA), a bachelor's or higher degree with a minimum one year experience performing substantive legal work under the direct supervision of a licensed attorney AND completion of 15 hours of CLE within that year; a certificate of completion from an ABA-approved paralegal education program; certificate of completion from a paralegal program administered by any college or

university accredited or approved by the Texas Higher Education Coordinating Board or its equivalent in another state.

3. While desirable that a paralegal have legal instruction from a formal paralegal education program, the State Bar recognizes that some paralegals are qualified by training through previous work experience. If an applicant does not meet the educational criteria, four years previous work experience in performing substantive legal work is suggested as a minimum.

**B. Delegation of Substantive Legal Work:**

"Substantive legal work" includes drafting and other tasks that absent the paralegal, the lawyer would perform. "Substantive legal work" does not include clerical or administrative work. Accordingly, a court may refuse to order recovery of paralegal time for such nonsubstantive work. *Gill Sav. Ass'n v. Int'l Supply Co., Inc.*, 759 S.W.2d 697, 705 (Tex. App. Dallas 1988, writ denied).

**C. Consideration of Ethical Obligations**

Both the attorney and paralegal have responsibility for ensuring ethical conduct of the paralegal, consistent with the attorney's professional obligations. The attorney should inform a client whether a paralegal will work on the legal matter, and what fees will be charged for the paralegal's work. A paralegal is prohibited from engaging in the practice of law, providing legal advice, signing pleadings, negotiating settlement agreements, soliciting legal business on behalf of an attorney, setting a legal fee, accepting a case, or advertising or contracting with members of the general public for the performance of legal functions.

**III. Approval of Courses, Videotapes and Audiotapes.** The Paralegal Division, State Bar of Texas, shall review all reports submitted by initial or maintaining membership and shall approve the courses, videotapes, and audiotapes identified as to their appropriateness for the continuing legal education of legal assistants. All submissions accredited for attorney CLE by the Minimum Continuing Legal Education department of the State Bar of Texas shall be deemed approved, except that any CLE activity that primarily involves reading by oneself shall not count towards the twenty (20) hour requirement.

**IV. Fees.** The fee for initial members shall be \$25 for members in good standing of the Paralegal Division, State Bar of Texas, and \$50 for other paralegals. The annual fee for all maintaining members shall be \$45.