

## **Legal Research and Reference Policies**

Lex Libris Group DOES NOT provide legal advice. Legal advice may only be given by licensed attorneys. While many of our Legal Information Professionals have Juris Doctors from ABA-Accredited institutions, we are not practicing attorneys.

We CANNOT interpret the meaning of any document, legal or otherwise, will not read a statute, in whole or part, to any client over the phone, if you have a citation we will certainly send you the citation via document delivery; while we can send you a form that you request we will not assist you in filling out the form and we will not advise you on which forms are best for your needs.

### **What we will NOT provide:**

- Legal Advice
- Legal Document Interpretation
- The Filing of Legal Forms
- Filling out Legal Forms
- Appellate Brief Writing Services

Our information professionals locate information, identify relevant resources, develop search strategies for catalogs, databases, the web and indexes and provide assistance in legal research methodology. We cannot provide substantive advice on a legal problem, interpret legal materials for you, or explain how the law applies to your particular case.

The above examples of services that we do not provide are just that, examples, and we reserve the right to deny requests that we find ethically and professional irresponsible.

Lex Libris Group will confirm that all attorneys listed are in good standing with their respective state Bar Associations. If we are unable to confirm this with the information you provide, an employee of Lex Libris Group will be in contact to request your Bar Number to assist with verification of bar status. It is ENTIRELY the attorney responsibility to review any and all information for services rendered.

### **Applicable ABA Model Rules**

#### **Rule 5.3 Responsibilities Regarding Non-lawyer Assistance**

With respect to a non-lawyer employed or retained by or associated with a lawyer:

(a) a partner, and a lawyer who individually or together with other lawyers possesses comparable managerial authority in a law firm shall make reasonable efforts to ensure that the firm has in effect measures giving reasonable assurance that the person's conduct is compatible with the professional obligations of the lawyer;

(b) a lawyer having direct supervisory authority over the non-lawyer shall make reasonable efforts to ensure that the person's conduct is compatible with the professional obligations of the lawyer; and

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(c) a lawyer shall be responsible for conduct of such a person that would be a violation of the Rules of Professional Conduct if engaged in by a lawyer if:

(1) the lawyer orders or, with the knowledge of the specific conduct, ratifies the conduct involved; or

(2) the lawyer is a partner or has comparable managerial authority in the law firm in which the person is employed, or has direct supervisory authority over the person, and knows of the conduct at a time when its consequences can be avoided or mitigated but fails to take reasonable remedial action.

### **Rule 5.7 Responsibilities Regarding Law-Related Services**

(a) A lawyer shall be subject to the Rules of Professional Conduct with respect to the provision of law-related services, as defined in paragraph (b), if the law-related services are provided:

(1) by the lawyer in circumstances that are not distinct from the lawyer's provision of legal services to clients; or

(2) in other circumstances by an entity controlled by the lawyer individually or with others if the lawyer fails to take reasonable measures to assure that a person obtaining the law-related services knows that the services are not legal services and that the protections of the client-lawyer relationship do not exist.

(b) The term "law-related services" denotes services that might reasonably be performed in conjunction with and in substance are related to the provision of legal services, and that are not prohibited as unauthorized practice of law when provided by a non-lawyer.

### **Legal Research Performed**

Lex Libris Group does not become part of your legal research team; therefore, we do not need to have confidential client information to perform legal reference and research tasks for you. Our legal information services team primarily provides legal reference assistance, but as the nature of legal reference is to assist legal research, legal research services are provided at a basic level.

Note: Legal reference and legal research are two separate services. The following is a permissible list of **legal research** tasks:

- Any research involving the compilation of a legislative history;
- Researching proper primary and secondary law;
- Legal research strategy and organization assistance

This list is, of course, not inclusive. As long as you can explain your legal research issue to us without having to provide confidential client information we can assist you in a completely online, virtual capacity.