



# The State Bar of California

## ETHICS RESOURCES

The State Bar of California's Office of Professional Competence offers various regulatory resources to assist attorneys in maintaining their professional responsibilities. The [Ethics](#) webpage includes: (1) the full text of the new Rules of Professional Conduct, approved by the Supreme Court and operative on November 1, 2018; (2) State Bar Ethics Opinions; (3) State Bar Rules and related statutes regarding duties of attorneys and discipline; (4) full text of the *Handbook on Client Trust Accounting for California Attorneys*; and (5) information about the Committee on Professional Responsibility and Conduct.

### Ethics Hotline

The [Ethics Hotline](#), a confidential research service for attorneys only, helps lawyers identify and analyze their professional responsibilities. Since 1983, the Ethics Hotline has been one of the State Bar's most valued services. Although staff members cannot provide legal counsel, advice, or opinions, they can discuss issues and authorities with lawyers. By referring callers to statutes, rules, cases, and nonbinding opinions of ethics committees, staff members strive to help attorneys reach informed decisions about their professional responsibility questions. Staff members monitor new cases and laws to provide up-to-date information. Some of the topics addressed by the Hotline are:

- Advertising
- Communications
- Competence, confidences, and secrets
- Conflicts of interest
- Fees and costs
- Files
- Misconduct
- Unauthorized practice of law
- Withdrawal from employment

More information about the Ethics Hotline, including options for contacting the service, is found at the [Ethics Hotline webpage](#).

### Online Ethics Resources

#### Ethics Opinions

The State Bar's Committee on Professional Responsibility and Conduct (COPRAC) has published over 200 [advisory ethics opinions](#) regarding the ethical propriety of hypothetical attorney conduct. Although not binding, they are often cited in the Supreme Court's decisions, the State Bar Court Review Department, and the Court of Appeal.

COPRAC is a standing committee of the State Bar Board of Trustees. In addition to its primary charge to issue advisory ethics opinions, COPRAC also develops and presents continuing education programs, including an Annual Statewide Ethics Symposium.

#### Client Trust Accounting Resources

The [Client Trust Accounting](#) webpage is a collection of client trust accounting resources, which includes information about relevant rules and statutes, publications (including the Client Trust Accounting Handbook), forms, ethics opinions, trust accounting MCLE programs, and online videos. The Client Trust Accounting Handbook is a downloadable practical guide created to assist attorneys in complying with the record-keeping standards for client trust accounts. The handbook includes: (1) a copy of the standards and statutes relating to an attorney's trust accounting requirements; (2) a detailed description of how to maintain a client trust account; and (3) sample forms.

## **Ethics and Technology Resources**

The [Ethics and Technology](#) webpage is a collection of resources addressing attorney professional responsibility issues that arise in connection with websites, social media, email, chat rooms, and other technologies. The resources include advisory ethics opinions, articles, and MCLE programs.

## **Attorney Civility and Professionalism Resources**

The [Attorney Guidelines of Civility and Professionalism](#) were adopted by the Board of Trustees to provide best practices of civility in the practice of law and are offered to promote the effectiveness and enjoyment of the practice of law and economical client representation.

## **Senior Lawyers Resources**

Many attorneys reach their senior years with questions about what to do if they face health problems that might affect how long they can work. They might be thinking of closing their practices or how to handle their business if they were to become seriously ill suddenly. This [Senior Lawyers Ethics Resources](#) webpage is a collection of resources addressing attorney professional responsibility issues that arise in connection with retirement, disability, and death of attorneys. The resources include rules, advisory ethics opinions, articles, publications, and MCLE programs. Additionally, this webpage includes information regarding closing a law practice and attorney surrogacy.

## **Mandatory Fee Arbitration Program**

The Mandatory Fee Arbitration Program is an informal, confidential, and lower cost forum for resolving fee disputes between lawyers and their clients. Mandatory fee arbitration is required for a lawyer if requested by a client. Attorneys are required to provide a notice of the right to fee arbitration to the client before pursuing formal collection proceedings. Local county bar associations administer most fee arbitration cases. The [Mandatory Fee Arbitration Program Forms and Resources](#) webpage offers the following: (1) Sample Written Fee Agreements (including Instructions, Optional Clauses, and Disclosure Forms), (2) Arbitration Advisories, (3) rules related to Mandatory Fee Arbitration, (4) a list of approved local county bar associations offering Mandatory Fee Arbitration, and (5) a variety of forms (such as a Notice of Client's Right to Fee Arbitration Form and a Request for Arbitration of a Fee Dispute Form).

## **Publications**

### **California Rules of Professional Conduct and the State Bar Act (Publication 250)**

*Publication 250* is a 2-volume desktop resource book which includes: (1) the California Rules of Professional Conduct (past and present); (2) the State Bar Act; (3) selected California Rules of Court related to the State Bar and attorney conduct; (4) selected statutes related to duties of attorneys and discipline; (5) Lawyer Referral Service Rules; (6) Minimum Continuing Legal Education (MCLE) Rules; (7) Pro Bono Resolution; (8) Mortgage Assistance Relief Service Rule; and (9) Construction-Related Disability Access Claims Information. *Publication 250* can be purchased [online](#).

### **E-Reader Version of California Rules of Professional Conduct and the State Bar Act (Publication 250)**

The e-Reader version of the rule book can be purchased at [Amazon.com](#) for \$6.99, a significant discount from the price of the hardcopy book. The *e-Reader version* of the rule book is compatible with the Kindle Reader App, a free e-Reader application available for iPads, iPhones, Blackberry phones, Android phones, MacBook, and PC laptops. It offers several useful features, including a search function, bookmarking, highlighting, and annotating. Also, once downloaded to a tablet, smartphone, or other compatible devices, the book can be accessed at any time, even without an Internet or cellular data signal.

### **California Compendium on Professional Responsibility Index**

The [California Compendium on Professional Responsibility Index](#) is a legal ethics research tool that provides a comprehensive subject matter index that lists citations to the rules, statutes, case law and ethics opinions published on point. The index is updated annually and is posted [online](#).