

TABLES OF ETHICS OPINIONS

Ethics opinions are organized by topic and sorted by the authoring ethics committee chronologically from newest to oldest. This table includes ethics opinions published by the State Bar’s Committee on Professional Responsibility and Conduct ([CAL](#)), the California Lawyers Associations Ethics Committee ([CLA](#)), the Los Angeles County Bar Association Professional Responsibility and Ethics Committee ([LA](#)), the Orange County Bar Association Professionalism and Ethics Committee ([OC](#)), the San Diego County Bar Association Legal Ethics Committee ([SD](#)), and the Bar Association of San Francisco Legal Ethics Committee ([SF](#)). For opinions issued by other associations, please visit the authoring committee’s website.

Ethics opinions published before November 1, 2018, cite the applicable California Rules of Professional Conduct in effect at the time of the writing of the opinion. Please refer to the California Rules of Professional Conduct [Cross-reference Table](#) which lists the current Rules of Professional Conduct by name and number along with the corresponding rule numbers during the prior earlier time periods. There, you can also link to the text of the current rule.

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ADVERTISING AND SOLICITATION

Source	Opinion #	Topic Specified
CAL	2019-199	Attorney Directory and Rating Websites
CAL	2016-196	Attorney Blogging
CAL	2012-186	Social Networking
CAL	2004-167	Firm Name Implies a Connection to Governmental Entities
CAL	2004-166	Communications with Prospective Clients in Mass Disaster Internet Chatrooms
CAL	2001-155	Attorney Website Advertising
CAL	1997-150	Shared Office Space and Services
CAL	1997-148	Markets/Advises Estate Plans to the Public
CAL	1995-144	Solicitation Through Investigatory Interviewing of Witnesses
CAL	1995-143	Third Party Presentations Promoting a Lawyer's Services
CAL	1995-142	Targeted Mailings to Criminal Defendants
CAL	1993-129	"Of Counsel" to Multiple Law Firms and Representation of Adverse Interests
CAL	1988-105	Soliciting Personal Injury Victims by Phone or Mail and Waivers of Improper Solicitations
CAL	1986-90	Individual Licensees Advertising as a Single Entity/Firm Name Including Former Partners
CAL	1986-88	"Of Counsel" Law Firm Relationships
CAL	1982-67	Mailing Advertisements
CAL	1982-66	Using a "Trade Name" for a Law Office
CAL	1981-61	Soliciting Business from Another Attorney Including In-House Counsel
CAL	1980-54	Non-Targeted, Mailed Solicitations to Potential Business Clients
CAL	1977-44	Participating in a Service Exchange
CAL	1977-42	Public Defender Soliciting Employment of Criminal Defendants
CAL	1975-32	Professional Announcements in "Nonlegal Newspapers"
CAL	1972-29	Participation in a TV Lecture Series for Legal and Nonlegal Services
CAL	1971-27	Firm Name Indicating a Partnership None Exists
CAL	1971-24	Use of Professional Designation Symbol
CAL	1970-20	Misleading Firm Names
CAL	1969-19	Advertising Materials
CAL	1969-18	Lawyer and Consultant Partnership
CAL	1969-17	Attorney Participation in Radio Programming
CAL	1968-13	Soliciting Clients on Behalf of Organizational Client
CAL	1967-12	Attorney as Private Professor
CAL	1967-10	Legal Advertising and Specialization
CAL	1967-8	Paid Political Advertising by Attorneys
CAL	1967-7	Advertisements in Out-of-Town Telephone Directories
LA	530	Law Firm Using Former Partner's or Shareholder's Name
LA	494	Cold Calling for Legal Seminar and Mailing of Newsletter
LA	474	Private Investigator to Solicit Clients
LA	359	Advertising and Solicitation – Division of Fees – Lay Intermediaries

ADVERTISING AND SOLICITATION

Source	Opinion #	Topic Specified
OC	2022-01	Use of Client Information in Attorney Bio or Resume
OC	93-001	Targeted Mailing
SD	2021-1	Networking Group vs Lawyer Referral Service
SD	2019-2	Limited Scope Telephonic Consultation Marketing Program
SD	2018-2	Initiate Call to Prospective Client Facilitated by Lawyer Referral Service
SD	2018-1	Social Media Marketing to Mass Disaster Victims
SD	2000-1	Solicitation at Scene of Accident
SD	1996-1	"Of Counsel" Conflicts
SD	1992-3	Targeted Mailing
SD	1985-1	Shared Office Space
SD	1983-5	Targeted Mailing vs Solicitation
SD	1978-2	Legal Clinic Advertising
SD	1977-4	Scope of Legal Advertising
SD	1976-11	Advertising – Member in a Senior Citizens Group
SD	1976-9	Advertisement of Paralegals
SD	1976-7	Free Legal Services Programs
SD	1976-4	Impermissible Solicitation
SD	1976-3	Solicitation of Prospective Clients
SD	1976-2	Local Newspaper Advertising
SD	1976-1	Group Legal Services Plan
SD	1975-16	Multiple Addresses on Letterhead
SD	1975-15	Free Standing Sign
SD	1975-14	Solicitation
SD	1975-13	Discounted Legal Services
SD	1975-11	Former Associate Solicitation
SD	1975-9	Telephone Directory Listings
SD	1975-8	County Bar Solicitations
SD	1975-7	Symbol on Business Cards
SD	1975-6	Prepaid Group Legal Plan Advertising
SD	1975-5	Solicitation for Office Help
SD	1975-3	Scholastic Background Article
SD	1975-2	Solicitation of Tax Clients
SD	1974-23	Shared Office Space
SD	1974-21	Letterhead Advertising and Solicitation
SD	1974-19	Donation of Legal Services
SD	1974-16	Attorney Participation in College Lectures or Seminars
SD	1974-11	Chamber of Commerce Directory
SD	1974-10	Use of "JD" or "Doctor" on Letterhead
SD	1974-9	Free Legal Clinic

ADVERTISING AND SOLICITATION

Source	Opinion #	Topic Specified
SD	1974-5	Law Clerk Business Cards
SD	1974-3	Legal Editorials
SD	1973-14	Sponsorship of Coffee Hour Meeting
SD	1973-10	Advertisement in Naval Air Station Directory
SD	1973-8	Providing Business Card to a Union
SD	1973-6	Listings in City Directory
SD	1973-5	Indirect Advertising and Solicitation
SD	1973-4	Biographical Background Information
SD	1973-2	Donations of Merchandise
SD	1973-1	Advertising Signs
SD	1972-16	Name on Letterhead
SD	1972-14	Sign Size and Content
SD	1972-11	Business Cards and Other Stationary
SD	1972-9	Business Cards
SD	1972-8	Education Degrees in Announcements
SD	1972-7	Rental Office Space to Organization
SD	1972-4	Attorney's Directory
SD	1970-1	Establishment of Office
SD	1969-8	Seminar for Existing Clients
SD	1969-7	Publication in Magazine
SD	1969-6	Advertisement of Panel Discussion Including Attorney
SD	1969-5	Professional Designations
SD	1968-1	Directory of Attorneys

ADVISING THE VIOLATION OF LAW

Source	Opinion #	Topic Specified
CAL	2020-202	Advising a Cannabis Business
CAL	2003-162	Advocation of Civil Disobedience
CAL	1996-146	Advising or Assisting Violation of Law
LA	527	Advising a Cannabis Business
SD	1993-1	Propriety of Asset Protection Planning
SF	2015-1	Advising a Cannabis Business

BUSINESS TRANSACTIONS WITH CLIENT/PAYMENT OF COSTS & EXPENSES/CLIENT GIFTS		
Source	Opinion #	Topic Specified
CAL	2020-204	Litigation Funding
CAL	2011-180	Gift From Client
CAL	1995-140	Compensation From Insurance Agent to Whom Client is Referred
CAL	1982-65	Donation of Legal Services
CAL	1979-48	Failure to Pay Reporter's Fees
CAL	1976-38	Advancing Litigation Costs
LA	517	Indemnification of Client's Litigation Costs
LA	500	Financing Legal Expenses of Another's Lawsuit
LA	495	Payment of Legal Expenses for Client
LA	492	Interest in Client's Real Property as Payment for Fees
LA	462	Preparation of a Will in Which the Attorney Acquires an Interest
SD	1977-2	Gifts from Client

CLIENT FILES		
Source	Opinion #	Topic Specified
CAL	2007-174	Return of Electronic Client Files
CAL	2007-173	Private Will Depository/Registry
CAL	2001-157	Former Client File Retention
CAL	1994-134	Employment Terminated but Substitution of Counsel not Filed
CAL	1992-127	Release of Criminal Client File to Successor Counsel
LA	509	Release of Client Psychiatric Records to Former Client
LA	493	Dispute over Client File Between Former Joint Clients
LA	491	Destruction of Client File When Client is Deceased
LA	481	Duties to Opt-Out Members of a Class
LA	475	Duty to Retain or Return
OC	2005-01	Electronic File Transfer and Work Product Rules
SD	2004-1	Compelled Waiver of Work Product Protection
SD	2001-1	Conditioning Client File Until Copying Fees Paid
SD	1997-1	Uncommunicated Work Product
SD	1984-3	Return of Client File Upon Withdrawal
SD	1977-3	Discharged Lawyer Withholding File Over Unpaid Fees
SD	1970-3	Ownership of Client Files
SF	1996-1	Disposal of Client File
SF	1990-1	Uncommunicated Work Product
SF	1984-1	Discharged Lawyer Withholding File Over Unpaid Fees

CLIENT TRUST ACCOUNT

Source	Opinion #	Topic Specified
CAL	2013-187	Third-Party Payor
CAL	2009-177	Jointly Payable Settlement Check
CAL	2008-175	Successor Counsel Lien Duties
CAL	2006-171	Withdrawn Fees When Client Later Disputes
CAL	2005-169	Overdraft Protection; Withdrawal of Earned Fees
CAL	1988-97	Lay signatory on Client Trust Account
CAL	1975-36	Identity of Client Trust Account Funds
LA	534	Former Attorney Duties to Resolve Lien
LA	485	Bank Fees/Charges
LA	484	Commingling of Client Trust Account Funds
LA	478	Medical Liens
LA	454	Fiduciary Obligations to Third Parties
SD	1976-5	Identity of Client Trust Account Funds
SF	1980-1	Flat Fee Exception

COMMUNICATIONS

Source	Opinion #	Topic Specified
CAL	2015-194	Puffing in Negotiations
CAL	2013-188	Unsolicited Email Correspondence
CAL	2011-181	Implied Consent
CAL	1996-145	Ascertaining Representation Status
CAL	1993-131	Communications Between Represented Persons
CAL	1991-125	Ex Parte Communication with Director of Organization
CAL	1989-110	Bankruptcy Trustee Communicating with Represented Bankruptcy Parties
CAL	1977-43	Communications with Public Official
CAL	1975-33	Communication with Adverse Party's Physician
CAL	1965-3	Interview Manager of Adverse Party
LA	531	Former Employee of Adverse Party Offers Privileged Evidence
LA	520	Inform Adverse Party Regarding Erroneous Settlement Payment
LA	508	Contacting Defendant's Insurer
LA	490	Ex Parte Contact with Adverse Witnesses
LA	487	Ex Parte Contact with Represented Individual
LA	472	Contact with Represented Organization Principals
SD	2011-2	Attorney Sends Social Media "Friend Request" to Adverse Party
SD	1984-5	Communication with Represented Organization's Employee
SD	1983-11	Opposing Attorney's Client Communicates with Attorney
SD	1983-9	Attorney Communicates with Doctor of Opposing Party
SD	1983-2	Attorney Requests Opposing Attorney's Client to Not Communicate with Client
SD	1978-9	Communicating with Adverse Party Represented by Counsel
SD	1978-8	Communicating with Adverse Party Represented by Counsel
SD	1978-3	Communicating with Adverse Party Represented by Counsel in Unrelated Matter
SD	1976-14	Transactions Between Attorney and Adverse Party After Judgment
SD	1972-5	Contact with Adverse Party
SD	1968-2	Settlement Negotiations
SF	1983-1	Contact Officer/Director/Employee of Adverse Party

COMPETENCE/DILIGENCE		
Source	Opinion #	Topic Specified
CAL	2015-193	ESI and Discovery Requests
CAL	1984-77	Inability to Communicate in Client's Language
SD	2018-3	ESI and Discovery Requests
SD	2012-1	Use of Digital Technology
SD	1974-2	Appearance Attorneys

CONFIDENTIALITY		
Source	Opinion #	Topic Specified
CAL	2020-203	Data Breach
CAL	2016-195	Publicly Available Confidential Information
CAL	2015-192	Disclosure of Confidences at Motions for Withdrawal
CAL	2012-183	Duty of Confidentiality and Seeking Legal Advice
CAL	2010-179	Data Breach
CAL	1988-96	Disclosure of Client's Past Misconduct
CAL	1986-89	Disclosure of Stolen Property
CAL	1984-76	Disclosure of Evidence About the Crime
CAL	1981-58	Disclosure of Expert Opinion to Third Parties
CAL	1979-50	Nonattorney Disclosure of Client Confidences
CAL	1976-37	Disclosure of Confidences in Child Custody Case
CAL	1971-25	Third Party Preservation of Client Confidences
CLA	2022-1	Confidentiality in Collecting Fees
LA	529	Elicit Confidential Information Through Social Media
LA	525	Adverse Comments Published by Former Client
LA	519	Self-Defense Exception Related to Third Party Claims
LA	512	Settlement Amount in Settlement Agreement (Restricting Right to Practice)
LA	506	Initial Client Consultation
LA	504	Client Request to Not Disclose Harmful Confidential Information
LA	498	Disclosure of Client Misrepresentation in a Fee Dispute
LA	466	Disclosure of Evidence of Crime Received From Client
LA	456	Information in Lawyer's Bills
LA	452	Disclosure of Former Bankruptcy Counsel Trying to Collect Fee
LA	451	Publication Legal Article Related to Client's Case
LA	417	Client Receipt of Funds to Which it May Not Be Entitled
LA	386	Disclosure of Client Perjury
LA	358	Disclosure of Financial Information to Board of Directors
LA	353	Illegal Issuance of Securities
LA	274	Files
LA	267	Disclosure of Guardian Misuse of Funds
LA	264	Disclosure to Prevent a Crime
OC	97-002	Communications Technology
SD	2011-1	Candor versus Confidentiality
SD	2008-1	In-House Attorney Seeking Legal Advice About Former Client
SD	1990-1	Bodily Harm Exception
SD	1977-6	Duties to Prospective Client
SF	2014-1	Adverse Comments Published by Former

CONFLICTS OF INTEREST (ALL)

Source	Opinion #	Topic Specified
CAL	2021-205	Duties to Prospective Client
CAL	2019-197	Seeking Advice About Current Clients
CAL	2014-191	In Rem Bankruptcy Proceedings
CAL	2011-182	Directly Adverse with Another Client
CAL	2002-158	Separation of Public Defenders Office into Different Branches
CAL	1998-152	Duties to Former Clients and Imputed Conflicts
CAL	1995-139	Matters Adverse to Insurer when Hired by Insurer to Represent Insured
CAL	1993-133	Represent Formerly Adverse Party in Malpractice Claim Against Former Attorney
CAL	1993-129	Principal Law Firm and "Of Counsel" Representing Adverse Interests
CAL	1993-128	Screening of Criminal Defense Attorney Who Previously Assisted in Prosecution
CAL	1989-115	Waiver of Client's Right to Disqualify Attorney
CAL	1989-108	Arguing Different Sides of the Same Legal Question Before Same Judge
CAL	1987-93	Criminal Law Conflicts
CAL	1987-92	Sexual Relationship With a Client
CAL	1987-91	Insurance In-House Counsel to Represent Insureds
CAL	1986-88	Law Firm Designated as "Of Counsel" to Another Law Firm
CAL	1984-84	Duties to Prospective Client
CAL	1984-83	Public Defender and District Attorney are Married to One Another
CAL	1984-80	Attorney Representing Client While Further Serving as Tripartite Arbitrator
CAL	1981-63	Law Firm Represents Member of City Council While Representing Actions Against City
CAL	1981-59	Representing Two Defendants in Separate and Unrelated Criminal Cases
CAL	1981-57	Representing Client Against Clients of a Former Legal Partner
CAL	1981-55	Attorney as Guarantor on a Client's Cost Bond
CAL	1980-52	Public Defender Represents Client When their Former Client is a Witness
CAL	1979-49	District Attorney Communicating with Represented Defendant in Another Matter
CAL	1977-46	Attorney-Council Member Conflicts
CAL	1977-45	Welfare and Institutions Code 300 Conflicts
CAL	1976-41	Representation of a Pretermitted Heir of Decedent's Estate
CAL	1975-35	Legal Fees Paid by Criminal Organization
CAL	1970-22	Joint Clients in Criminal Defense
CLA	2023-1	Non-Lawyer Conflicts of Interest
CLA	2021-1	Elements of Effective Ethical Screens
LA	537	Multiple Client Representations Under Rule 1.7(b)
LA	536	Advising or Representing Client About Prior Work Done For Client
LA	533	Joint Clients with Potential or Actual Conflicts of Interest
LA	528	Representing Insurance Carrier in Defense of Insured
LA	524	Non-Lawyer Conflicts of Interest
LA	521	Fee Dispute with Client
LA	513	Cross-Examination of Former Client as Expert Witness

CONFLICTS OF INTEREST (ALL)

Source	Opinion #	Topic Specified
LA	501	Changing Law Firms and Imputed Conflicts
LA	471	Joint Representation and Informed Consent
LA	465	Conflicts in Employer/Alien Permanent Resident Visa Application
LA	464	Insurer/Insured and Cumis Counsel
LA	463	Duties to Former Clients
LA	459	Adverse and Conflicting Interests in Juvenile Dependency Proceeding
LA	455	Purchase of Property at Foreclosure/Judicial Sale
LA	453	Representation of Criminal Defendant by Member of Firm Acting as City Prosecutor
LA	424	Duty of Loyalty between Insured and Insurance Company
LA	363	Changing Law Firms
LA	352	Adverse Interests
OC	2003-02	Attorney-Client Sexual Relations
SD	2017-2	Guardian Ad Litem Conflicts
SD	2017-1	Representation of Company, Employees, and Law Firm's Associate
SD	2013-1	Joint Client Settlement Negotiation Conflict
SD	1995-1	Effective Representation in "Strikes" Cases
SD	1993-2	Law Firm Represents Accused Murderer of Former Criminal Client
SD	1990-3	Undue Influence in Preparation of Will
SD	1990-2	Representation of Executor in Probate Action Who Misappropriated Funds
SD	1989-4	Professional Relationship with Other Party's Lawyer
SD	1987-2	Referral Fee Adverse to Client
SD	1987-1	Insurer and Insured Conflicts
SD	1984-2	Duties to Former Client (Husband) When Wife Later Seeks Representation
SD	1978-11	Joint Representation of Deceased Client's Heirs and Company
SD	1978-10	Malpractice Action Against Former Attorney and Dissolved Law Corporation
SD	1977-1	Employed as City Attorney While Sitting on SD Coast Regional Commission
SD	1976-16	County Counsel Office Conflicts
SD	1976-12	City Counsel Associates Represents Criminal Defendants
SD	1976-10	Duties to Former Clients
SD	1975-19	Joint Clients Conflicts
SD	1975-1	Duties to Former Client Spouse in Dissolution
SD	1974-22	Potential Adverse Interests Between Multiple Clients
SD	1974-15	Duties to Former Client as Complaining Witness
SD	1974-14	Representation of Former Client Against Former Client on Unrelated Matters
SD	1974-13	Representation of Corporation Against Former Client Incorporator
SD	1974-12	Representation of Creditor Adverse to Former Clients
SD	1972-15	Adverse Attorneys Who Share Office Space
SD	1972-3	Acting as Lawyer for Secretary
SD	1972-2	Representation of Client Potentially Adverse to Insurance Carrier Client

CONFLICTS OF INTEREST (ALL)

Source	Opinion #	Topic Specified
SD	<u>1972-1</u>	Withdrawal Due to Conflict
SD	<u>1969-1</u>	City Council as Attorney Conflicts
SD	<u>1968-3</u>	Joint Client Conflicts
SF	<u>2020-1</u>	Joint Clients in Mass Tort Action – Part 2
SF	<u>2017-1</u>	Joint Clients in Mass Tort Action – Part 1
SF	<u>1985-1</u>	“Of Counsel” Conflicts

DUAL PROFESSIONS

Source	Opinion #	Topic Specified
CAL	1999-154	Investment Advisory Service Involving Legal and Non-Legal Advice
CAL	1995-141	Rendering of Non-Legal Services to Client
CAL	1993-132	Director for Corporation but Facilitating Transaction for Another Client
CAL	1982-69	Real Estate Transaction Involving Legal and Non-Legal Services
CAL	1968-15	Attorney Becoming Affiliate Member of a Board of Realtors
LA	510	Financial Planning Company Involving Legal and Non-Legal Advice
LA	477	Attorney/Physician Conducting Law Practice While Being Partner in Medical Practice
OC	2011-02	Attorney For Organization While Also Serving on Board of Directors
SD	1992-1	Attorney Represents Estate and Real Estate Broker for Sale of Property
SD	1974-18	Attorney and Insurance Agent
SD	1974-17	Accountant Advisory Service Involving Legal and Non-Legal Advice
SD	1969-2	Lawyer Conducting Real Estate Business

FEES		
Source	Opinion #	Topic Specified
CAL	2026-210	Flat Fees and Termination
CAL	2009-176	Fee-Waiver Settlement Offer
CAL	2007-172	Fees Paid by Credit Card
CAL	2006-170	Charging Lien in Contingency Fee Agreement
CAL	2002-159	Financing Representation Through Mortgage Loan on Client's Real Property
CAL	1996-147	Billing on Multiple Matters at Same Time
CAL	1994-138	Hiring of Outside Lawyer Not Specific to a Case
CAL	1994-136	Attorney's Fees Pursuant to Civil Rights Statutes
CAL	1994-135	Structured Settlement Fee Agreements
CAL	1993-130	Payment from Executor and Statutory Fees
CAL	1989-114	Waving Statutory Fees as Part of Settlement in Civil Rights Action
CAL	1988-101	Interpleader
CAL	1987-94	Structured Settlements
CAL	1983-75	Referral Fee to Layperson
CAL	1983-72	Contingency Fees Based on Value of Community Property
CAL	1983-70	Increasing Fees to Cover Fees Paid to Lawyer Referral Service
CAL	1981-62	Notes or Liens as Security for Fees
CAL	1981-60	Earned Fees Paid to Service Exchange
CAL	1980-53	Interest Charged on Past Due Client Receivables
CAL	1975-34	Division of Fees Following Dissolution of Firm
CAL	1968-16	Delay of Litigation Until Fees are Paid
LA	535	Out-Of-Pocket Costs Related to Claiming Fees From Former Client
LA	526	Contingency Lawyer Right to First Proceeds of Settlement
LA	523	Combined Amount of Damages and Statutory Fees Awarded
LA	515	Attorney/Client Split of Statutory Attorney's Fees
LA	511	Sharing in Fees as Partner or Employee of Two Law Firms
LA	507	Acceptance of Prospective Profits as Attorney Fees
LA	503	Fixed Workers' Compensation Referral Fee
LA	499	Charging Interest on Costs Advanced on Behalf of a Client
LA	496	Liens on Recovery in Unrelated Case
LA	486	Referral Fees
LA	479	Duty to Inform Client of Fees
LA	473	Fee Divisions Among Lawyers
LA	470	Year-End Bonus to "Of Counsel" Attorney
LA	467	Client Consent to Referral Fee
LA	461	Division of Fees with Non-Lawyer
LA	458	Insurance Recovery Contingency Fee Agreement
LA	457	Compensation of Non-Attorney Based on Work Quality
LA	445	Settlements Restricting Fees in Civil Rights Cases

FEES		
Source	Opinion #	Topic Specified
LA	357	Medical Liens
LA	356	Fees as Condition to Dismissal of Action
LA	275	Contingent Fees
OC	99-002	Client Forges Settlement Agreement to Provide Payment to be Made to Client Alone
OC	99-001	Ambiguous Hourly Fee Agreement Language
SD	2025-1	Surcharging Clients Who Pay Legal Fees With Credit Cards
SD	2019-3	Refunding Unearned Advanced Flat Fees
SD	1973-3	Delay of Litigation Until Fees Have Been Satisfied
SD	1972-13	Payments for Services by Credit Card
SD	1972-10	Payments for Services by Credit Card
SD	1969-9	Representation of Indigent Clients
SD	1968-5	Purchase of Deceased Attorney's Probate Practice
SF	1999-1	Hybrid Fee Agreements
SF	1997-1	Negotiation and Re-Negotiation of Fee Agreements
SF	1989-1	Indemnify Client from Former Attorney's Lien
SF	1985-2	Advancing Litigation Costs in Contingency Fee Agreement
SF	1981-1	Financing Litigation Costs

FORMATION/SCOPE/ALLOCATION

Source	Opinion #	Topic Specified
CAL	2005-168	Implied Formation Through Communications Sent via Website
CAL	2004-165	Appearance Attorneys
CAL	2003-164	Implied Formation Through Radio Call-In Show
CAL	2003-161	Implied Formation in a Non-Office Setting
CAL	2002-160	Settlement Authority/Right to Legal Fees When Client is Missing
CAL	1989-111	Answer Due and Client is Missing
CAL	1970-23	Court Appointment to Represent Indigent Defendants
LA	505	Engagement Agreement Restrictions on Client Settlement Authority
LA	502	Limited Scope Pro Per Representation
LA	483	Limited Scope Pro Per Representation
LA	476	Scope of the Representation Defined
OC	2014-01	Ghostwriting by Contract and Out-of-State Lawyers
SD	1978-1	Acting Without Client Authority
SD	1972-17	Acceptance of Employment

LIMITING LIABILITY TO CLIENT

Source	Opinion #	Topic Specified
CAL	2012-185	Settling Dispute with Former Client
CAL	2009-178	Settling Fee Dispute with Former Client
CAL	1989-116	Mandatory Binding Arbitration Clause of Potential Malpractice Claim
CAL	1981-56	Arbitration Provision in Retainer Agreement
CAL	1977-47	Malpractice Arbitration Agreements
LA	489	Retaining Language Limiting Liability to the Client

MISCELLANEOUS – ETHICAL CROSSOVER OPINIONS

Source	Opinion #	Topic Specified
CAL	2024-209	Succession Planning
CAL	2021-207	Clients with Diminished Capacity
CAL	2021-206	Colleague Impairment
CAL	2020-201	Ethical Obligations When Departing Firm
CAL	2019-198	Settling Before Withdrawal
CAL	2014-190	Dissolving Firm and Moving to New Firm
CAL	2012-184	Virtual Law Offices
CAL	1997-151	Discovery Sanctions
CAL	1992-126	Attorneys Organizing and Participating in Temporary Employment Agencies
CAL	1989-112	Institute Conservatorship Without Client's Consent
CAL	1988-104	Restrictions on Lawyer's Right to Practice
CAL	1985-86	Duties to Client When Law Firm Dissolves
CAL	1984-79	Client Enters Contingency Agreement with Firm for Expert Testimony
CAL	1983-71	Authority of ABA Model Code on California Lawyer
CAL	1981-64	Legal Services Program Funding Reduced or Terminated
CAL	1979-51	Public Agency Attorneys Labor Action
CAL	1966-5	Recording Telephone Conversations
LA	532	Indemnify Opposing Party as Condition of Settlement
LA	518	Outsourcing of Legal Services
LA	516	"Of Counsel" with Law Firm While Having Separate Solo Practice
LA	488	Use of Law Office Management Services
LA	480	Restriction on Lawyer Competition
LA	468	Settlement Agreement Conditions
LA	460	Restrictive Retirement Payments
LA	450	Institute Conservatorship Against Present or Former Client
LA	361	Sale of Law Practice
OC	2011-01	Collaborative Family Law Agreement
OC	95-002	Advising Court of a Conservatorship
OC	94-003	Prosecutorial Candor to the Tribunal
OC	93-002	Fee Financing Plans
SD	2023-2	Moonlighting Independent of Associate Role
SD	2019-1	Sale of Electronic Form-Based Products
SD	2006-1	Receiving of Unsolicited Email from Non-Client
SD	1997-2	Public Sector "Compensation Bonus Program"
SD	1995-2	Meritorious Claims and Contentions
SD	1992-2	Reporting Professional Misconduct
SD	1983-10	Client (A Fiduciary) Fails to Perform or Acts Improperly
SD	1983-6	Attorney Discovers Indigent Client Has Money to Pay for Free Services
SD	1978-4	Law Firm Collection Supervisor Using Firm Letterhead

MISCELLANEOUS – ETHICAL CROSSOVER OPINIONS

Source	Opinion #	Topic Specified
SD	<u>1977-5</u>	Lawyer Referral Services
SD	<u>1975-10</u>	Ethical Complaint Against Attorney's Firm
SD	<u>1974-21.5</u>	Attorney Receives Referral from Non-Lawyer
SD	<u>1974-20</u>	Free Services to a Client's Customers
SD	<u>1974-7</u>	Group Legal Services for Members of a Union
SD	<u>1973-7</u>	Employment by a Union
SD	<u>1972-6</u>	Limited Legal Services Programs
SD	<u>1969-4</u>	Purchase of Deceased Attorney's Law Practice
SD	<u>1968-4</u>	Duty to Represent Indigent
SF	<u>2023-1</u>	Unethical Fee Agreement Provisions
SF	<u>2012-1</u>	Restrictions on Right to Practice
SF	<u>2011-1</u>	Recommending Client Discharge Co-Counsel
SF	<u>1999-2</u>	Conservatorship Without Client's Consent

ORGANIZATION AS CLIENT		
Source	Opinion #	Topic Specified
CAL	2003-163	Representing Corporation and Corporate Officer Individually
CAL	2001-156	Constituent Sub-Entities Positions are Antagonistic
CAL	1999-153	Representing Corporation and Shareholder A Against Shareholder B
CAL	1994-137	Receipt of Conflicting Instructions from Organization's Partners
CAL	1989-113	Adversity to Wholly Owned Subsidiary
OC	2012-01	Corporate Client is Acquired by Larger Corporation

TRIAL COMMUNICATIONS		
Source	Opinion #	Topic Specified
CAL	2019-200	Witness Perjury
CAL	2013-189	Deceitful Conduct
CAL	1997-149	Non-Expert Witness Payment
CAL	1991-124	Letter Stating "All Available Legal Remedies Will be Pursued"
CAL	1989-106	Offer to Dismiss Criminal Charges Conditioned on Release from Civil Liability
CAL	1988-100	Communication with Discharged Juror
CAL	1987-95	Disclosure of Excluded Evidence to Jurors After Trial
CAL	1986-87	Disclosure of Client's Prior Criminal Conviction
CAL	1985-85	Ex Parte Communication with Rehabilitation Consultant
CAL	1984-82	Ex Parte Communication with Administrative Officials
CAL	1984-81	Threatening to File EEOC Complaint
CAL	1984-78	Ex Parte Communication with Trial Judge on Matter Reviewed by Higher Court
CAL	1983-74	Client Perjury
CAL	1983-73	Threatening Administrative or Disciplinary Charges
CAL	1976-40	Prosecutor Informing Crime Victim of Possible Civil Remedies
CAL	1976-39	Communicating with Jurors After Trial
CAL	1972-30	Misleading Communications to Commence Trial
CAL	1967-11	Duty of Candor to Opposing Counsel
LA	514	Lawyer and Judicial Participation in Listserve Communications
LA	497	Consulting with Client During a Deposition
LA	482	Representations Made to Opposing Counsel and Court-Expert Witness
LA	469	Threatening Criminal, Administrative or Disciplinary Charges
OC	2003-01	Criminal Defense Client Perjury
OC	95-001	Candor to the Administrative Law Judge
OC	94-001	Judge-Attorney Contact Outside of Courtroom
SD	2023-1	Expert Witness Perjury
SD	2013-2	Sending Article to Judge with Handwritten Note
SD	2010-1	Assembling of Mock Jury with Members of Community Before Trial
SD	2005-1	Threatening Administrative Charges
SD	1989-1	Communication Sent to Judge While Also Sent to Opposing Counsel
SD	1987-3	Documents Mistakenly Sent to Opposing Party Rather Than Court
SD	1983-8	Non-party Witness Perjury
SD	1983-3	Duty to Disclose Altered Evidence
SD	1978-6	Threatening Counterclaim if Suit is not Dropped
SD	1974-8	Public Criticism of Sentence
SD	1969-3	Advise Opposing Counsel Intent to Enter Default Judgment

UNAUTHORIZED PRACTICE OF LAW

Source	Opinion #	Topic Specified
CAL	2023-208	Ethical Obligations When Working Remotely
CAL	1988-103	Paralegal Duties
CAL	1982-68	Creditor Collection Matters
LA	522	Creditor Collection Matters
OC	94-002	Paralegal Duties
SD	2007-1	Outsourcing Legal Work
SD	1984-4	Non-Lawyer Agency Assist in Filing and Serving Small Claims Actions
SD	1984-1	Non-Lawyer Partner Use of Lawyer Letterhead
SD	1983-12	Non-Lawyer Agency Rendering Dissolution of Marriage Services
SD	1983-7	Paralegal Service Agency Rendering Advice on Business Matters
SD	1975-18	In-House Counsel Advises Individual Employees
SD	1975-17	Nonprofit Handling of Consumer Complaints
SD	1974-1	Law Students
SD	1973-13	Non-Lawyer Preparation of Tax Forms
SD	1973-9	Law Students
SF	2021-1	Practicing in California but is Not Licensed in California