**AIC Mentoring Program Guidelines, Expectations and Acknowledgement**

**Inn Name and Number**

**EXPECTATIONS:**

* Mentors and mentees mutually agree to meet in groups or as mentoring pairs at least \_\_\_\_ to \_\_\_\_ times during the Inn program year for mentoring on agreed upon topics.
* Both mentors and mentees will make every effort to attend all scheduled mentoring sessions and actively participate to make mentoring experience as effective as possible.

**CONFLICTS OF INTEREST:**

The mentor program is intended to provide general assistance to mentees, but it is not intended to provide mentees with answers to case- specific questions.

* When discussing a particular legal issue, mentees should raise the question with their mentor in general terms.
* The mentee should take steps to avoid disclosing the identity of the mentee's client and to avoid any potential conflicts of interest.
* If a client's identity must be disclosed because of the nature of the legal question, or because of the mentor's office policies, the mentor shall ensure that no conflicts of interest exist before responding to the mentee's question.
* If a conflict is discovered that would prohibit the mentor from effectively mentoring the mentee, the mentor should discuss this with the Inn mentoring committee and Inn mentoring group leader, and a reassignment will be made.

**CLIENT CONFIDENTIALITY:** Any detailed conversation between the mentor and mentee regarding a specific problem of a client may require the mentee to obtain consent from the client before the mentee makes any disclosure to the mentor. A mentee's failure to obtain this consent may violate applicable Rules of Professional Conduct.

**EMPLOYMENT AS CO-COUNSEL:**

* The mentor shall not accept employment as co-counsel with the mentee, nor shall the mentor accept any client referral from the mentee.
* Mentors shall take all appropriate steps to avoid the appearance of the existence of any attorney/client relationship with the mentee's clients.
* Mentors may, however, provide mentees with referrals to other attorneys who could act as co- counsel or accept the referral of cases from the mentee.
* The mentoring relationship created under the Inn mentoring program is not for the purpose of obtaining legal advice for use by either the mentee or mentor.
* Accordingly, no attorney/ client relationship is intended to be created and none is created by participation in any Inn mentoring program.

**RESEARCH:** No research shall be required by the mentor in assisting the mentee.

**CONFIDENTIALITY OF MENTOR/MENTEE COMMUNICATIONS:** All communications between the mentor and mentee shall be kept strictly confidential, unless disclosure is required by federal or state statute, or the state Rules of Professional Conduct.

**INDEPENDENT LEGAL OPINIONS:**

* The mentee understands and agrees that information received by the mentee from the mentor will not be relied upon by the mentee as a substitute for his or her own judgment or opinion.
* The mentee further understands that the mentor's opinions and statements are not a substitute for his or her own opinion or independent research.
* No warranty is made by the mentor that any information given to the mentee is accurate or may be properly relied upon in connection with the mentee's practice.

**RELEASE:**The mentor program participants expressly release the American Inn of Court, its members, and other mentor program participants from liability arising from the mentor program.

**EMPLOYMENT OF THE MENTEE:** The mentor program is a learning tool and is not intended as a recruitment device or to provide employment opportunities.

* Advice from the mentor about general job hunting strategies and networking suggestions is appropriate.
* Additionally, the mentor program is not intended to provide counseling on personal matters unrelated to the law or the legal profession.

**MENTOR'S OFFICE POLICY:** The mentor is not required to take any action that would violate the mentor's office or firm policy. For example, the mentor shall not be required to share sample pleadings with the mentee, if the policy of the mentor's firm prohibits the mentor from doing so.

**I certify that I have received and read the acknowledgment of the mentor program guidelines and expectations, fully understand its contents, and accept its terms.**

**Date:   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Printed name of Participant: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Signature of Participant: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

***For Office Use Only:***

Program Year: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Status: ⃝ Mentor ⃝ Mentee

Paired with: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Part of mentoring Group: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Completed:

⃝ Pair Assessment One

⃝ Pair Assessment Two

⃝ Mid-year Assessment

⃝ End-of-year Assessment

Comments/Recommendations: