



# PARALEGAL ASSOCIATION OF FLORIDA, INC.

An affiliate of the National Association of Legal Assistants, Inc.

\* Post Office Box 7073, West Palm Beach, FL 33405 \* 1-561-833-1408 \*

## APPLICATION FOR NEW MEMBERSHIP

### Definitions and Qualifications of Paralegal (also known as Legal Assistant) Applicant

Paralegals/legal assistants are a distinguishable group of persons who assist attorneys in the delivery of legal services. Through formal education, training, and experience, paralegals/legal assistants have knowledge and expertise regarding the legal system and substantive and procedural law, which qualify them to do work of a legal nature *under the supervision of an attorney*.

"Legal Assistant" means a person, "who under the supervision and direction of a licensed attorney, engages in legal research and case development or planning in relation to modifications or initial proceedings, services, processes, or applications; or who prepares or interprets legal documents or selects, compiles, and uses technical information from references such as digests, encyclopedias or practice manuals and analyzes and follows procedural problems that involve independent decisions." (*Fla. Stat. ch. 57.104*) The terms "Legal Assistant" and "Paralegal" are utilized *interchangeably* and such professional positions are not intended to be misunderstood as two separate professions.

### CODE OF ETHICS AND PROFESSIONAL RESPONSIBILITY

(As adopted by the National Association of Legal Assistants, Inc. — July 14, 1995)

A legal assistant (paralegal) must adhere strictly to the accepted standards of legal ethics and to the general principles of proper conduct. The performance of the duties of the legal assistant shall be governed by specific canons as defined herein so that justice will be served and goals of the profession attained (See NALA Model Standards and Guidelines for Utilization of Legal Assistants, Section II.)

The canons of ethics set forth hereafter are adopted by the National Association of Legal Assistants, Inc. as a general guide intended to aid legal assistants and attorneys. The enumeration of these rules does not mean there are not others of equal importance although not specifically mentioned. Court rules, agency rules, and statutes must be taken into consideration when interpreting the canons.

**Canon 1.** A legal assistant must not perform any of the duties that attorneys only may perform nor take any actions that attorneys may not take.

**Canon 2.** A legal assistant may perform any task which is properly delegated and supervised by an attorney, as long as the attorney is ultimately responsible to the client, maintains a direct relationship with the client, and assumes professional responsibility for the work product. (See NALA Model Standards and Guidelines for Utilization of Legal Assistants, Sections IV and VII.)

**Canon 3.** A legal assistant must not: (See NALA Model Standards and Guidelines for Utilization of Legal Assistants, Section VI)

- (a) engage in, encourage, or contribute to any act which could constitute the unauthorized practice of law;
- (b) establish attorney-client relationships, set fees, give legal opinions or advise or represent a client before a court or agency unless so authorized by that court or agency; and
- (c) engage in conduct or take any action which would assist or involve the attorney in a violation of professional ethics or give the appearance of professional impropriety.

**Canon 4.** A legal assistant must use discretion and professional judgment commensurate with knowledge and experience but must not render independent legal judgment in place of an attorney. The services of an attorney are essential in the public interest whenever such legal judgment is required. (See NALA Model Standards and Guidelines for Utilization of Legal Assistants, Section VII.)

**Canon 5.** A legal assistant must disclose his or her status as a legal assistant at the outset of any professional relationship with a client, attorney, a court or administrative agency or personnel thereof, or a member of the general public. A legal assistant must act prudently in determining the extent to which a client may be assisted without the presence of an attorney. (See NALA Model Standards and Guidelines for Utilization of Legal Assistants, Section V.)

**Canon 6.** A legal assistant must strive to maintain integrity and a high degree of competency through education and training with respect to professional responsibility, local rules and practice, and through continuing education in substantive areas of law to better assist the legal profession in fulfilling its duty to provide legal services.

**Canon 7.** A legal assistant must protect the confidences of a client and must not violate any rule or statute now in effect or hereafter enacted controlling the doctrine of privileged communications between a client and an attorney. (See NALA Model Standards and Guidelines for Utilization of Legal Assistants, Section V.)

**Canon 8.** A legal assistant must do all other things incidental, necessary, or expedient for the attainment of the ethics and responsibilities as defined by statute or rule of court.

**Canon 9.** A legal assistant's conduct is guided by bar associations' codes of professional responsibility and rules of professional conduct.

**CATEGORIES OF MEMBERSHIP**  
(Bylaws § 3.2; Standing Rules §§ 1.1 - 1.5)

*Retain pages 1-2 for your records.  
Complete pages 3-4 and return with  
appropriate payment to  
PAF Headquarters.*

**ACTIVE MEMBERSHIP**

ACTIVE MEMBERSHIP IS OPEN TO ANY INDIVIDUAL WHO MEETS AT LEAST ONE OF THE FOLLOWING REQUIREMENTS. THIS IS THE ONLY MEMBERSHIP CLASSIFICATION WHICH CARRIES FULL VOTING PRIVILEGES. ACTIVE MEMBERS ARE ALSO THE ONLY PARALEGAL ASSOCIATION OF FLORIDA, INC. MEMBERS WHO MAY SERVE AS ASSOCIATION OFFICERS, MEMBERS OF THE BOARD OF DIRECTORS OR COMMITTEE CHAIRS.

- (A) Successful completion of Certified Paralegal/Certified Legal Assistant (CP/CLA) examination of National Association of Legal Assistants, Inc. (NALA) (Provide copy of current CP/CLA certificate or NALA congratulatory letter.) Certificate must be current.
- (B) Graduation from an American Bar Association (ABA) approved program of study for paralegals. (**Attach copy of ABA degree.**)
- (C) Graduation from a course of study for paralegals that is institutionally accredited but not ABA approved, and which requires not less than the equivalent of 60 semester hours of classroom study. (**Attach copy of degree AND transcript with total hours earned.**)
- (D) Graduation from a course of study for paralegals, other than those set forth above, plus not less than 6 months of in-house training as a paralegal. (**A copy of certificate AND completion of attorney attestation on page 4 of this application must be submitted with this application.**)
- (E) A baccalaureate degree in any field, plus not less than 6 months of in-house training as a paralegal. (**A copy of baccalaureate degree AND completion of attorney attestation on page 4 of this application must be submitted with this application.**)
- (F) A minimum of 3 years of law-related experience under the supervision of an attorney, including at least 6 months of in-house training as a paralegal. (**Completion of attorney attestation on page 4 of this application must be submitted with this application AND a separate letter from supervising attorney as to 3 years law-related experience.**)
- (G) Two years of in-house training as a paralegal. (**Completion of attorney attestation on page 4 of this application AND a separate letter from supervising attorney as to 2 years of in-house training as a paralegal must be submitted with this application.**)

**STUDENT MEMBERSHIP**

STUDENT MEMBERSHIP IS OPEN TO ANY INDIVIDUAL WHO IS CURRENTLY ENROLLED IN AN ACCREDITED UNIVERSITY, COLLEGE, JUNIOR COLLEGE OR OTHER ACCREDITED SCHOOL PURSUING A PROGRAM OF STUDY AS A PARALEGAL AND TAKING AT LEAST 6 SEMESTER HOURS OR EQUIVALENT OF LAW-RELATED COURSES — **OR** — TAKING AT LEAST 3 SEMESTER HOURS OR EQUIVALENT OF LAW-RELATED COURSES AND EMPLOYED FULL TIME IN LAW-RELATED FIELD. STUDENT MEMBERSHIP IS NOT OPEN TO ANY INDIVIDUAL WHO HAS SUCCESSFULLY COMPLETED NALA'S CP/CLA EXAMINATION.

**ASSOCIATE MEMBERSHIP**

- (A) Attorney.
- (B) Educator.
- (C) Any person having attained the age of 55 years who formerly would have been eligible for membership because of profession or otherwise.
- (D) Non-resident of the State of Florida who would otherwise qualify for membership.
- (E) Individuals who have graduated or completed a paralegal program but who have not been employed full-time as a paralegal for at least 6 months.

**SUSTAINING MEMBERSHIP**

- (A) Law firm.
- (B) Title company.
- (C) Banking company.
- (D) Other company providing services either to this organization or to law offices.
- (E) Other law-related business or enterprise.

**Upon approval of this application, membership in a local Chapter may be applied for where available. For more information, contact your local Chapter President.**

For office use only:

RETURN TO:

Executive Director: \_\_\_\_\_ Second VP: \_\_\_\_\_  
Date Received: \_\_\_\_\_ Date Approved: \_\_\_\_\_  
Amount Paid: \_\_\_\_\_ Date Expires: \_\_\_\_\_  
Payment Type: \_\_\_\_\_ Category: \_\_\_\_\_

PARALEGAL ASSOCIATION OF FLORIDA, INC.  
Post Office Box 7073  
West Palm Beach, FL 33405

### MEMBERSHIP

"Legal Assistant" means a person, "who under the supervision and direction of a licensed attorney, engages in legal research and case development or planning in relation to modifications or initial proceedings, services, processes, or applications; or who prepares or interprets legal documents or selects, compiles, and uses technical information from references such as digests, encyclopedias, or practice manuals and analyzes and follows procedure problems that involve independent decisions." (Fla. Stat. ch. 57.104) The terms "Legal Assistant" and "Paralegal" are utilized interchangeably and such professional positions are not intended to be misunderstood as two separate professions. An individual who has, through education, training and experience, demonstrated knowledge and expertise of the legal system and substantive and procedural legal principles, which qualify them to do work of a legal nature, under the supervision of an attorney, and who has satisfied at least one of the criteria for membership established by the Board of Directors of PARALEGAL ASSOCIATION OF FLORIDA, INC., is eligible to become a member.

NAME: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

HOME MAILING ADDRESS: \_\_\_\_\_ COUNTY: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_ PHONE: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

NAME OF EMPLOYER: \_\_\_\_\_

ADDRESS OF EMPLOYER: \_\_\_\_\_ COUNTY: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_ PHONE: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

I PREFER TO RECEIVE MAIL AT MY \_\_\_\_\_ HOME \_\_\_\_\_ OFFICE ADDRESS FAX: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

TOTAL YEARS AS A LEGAL ASSISTANT/PARALEGAL: \_\_\_\_\_ CP/CLA? \_\_\_\_\_ CLAS? \_\_\_\_\_ CFLA? \_\_\_\_\_

SPECIALTY: \_\_\_\_\_ NALA MEMBER? \_\_\_\_\_ YES \_\_\_\_\_ NO

FORMAL/SPECIAL EDUCATION OR TRAINING FOR PRESENT POSITION (Include Name and Address of School):  
\_\_\_\_\_

DATE OF GRADUATION/COMPLETION: \_\_\_\_\_

IN COMPLIANCE WITH THE AMERICAN DISABILITIES ACT, DO YOU HAVE ANY SPECIAL NEEDS? \_\_\_\_\_ YES \_\_\_\_\_ NO

HAVE YOU EVER BEEN CONVICTED OF A FELONY? \_\_\_\_\_ YES\* \_\_\_\_\_ NO

\* In accordance with Articles 3.9 and 3.27 of the NALA Bylaws, by which PARALEGAL ASSOCIATION OF FLORIDA, INC. is also governed, individuals who have been convicted of a felony are not eligible for membership.

I hereby apply for membership in PARALEGAL ASSOCIATION OF FLORIDA, INC. and certify that the above information is true and correct. I affirm that I have read and agree to be bound by the Code of Ethics and Professional Responsibility adopted by the National Association of Legal Assistants, Inc. and PARALEGAL ASSOCIATION OF FLORIDA, INC. If I am advised by PARALEGAL ASSOCIATION OF FLORIDA, INC. that I have been found to be in violation of Section 3.8 of its Bylaws, I will, on my own initiative, resign my membership from PARALEGAL ASSOCIATION OF FLORIDA, INC. I HEREBY GIVE CONSENT TO PARALEGAL ASSOCIATION OF FLORIDA, INC. TO CONTACT MY PRESENT AND/OR FORMER SUPERVISING ATTORNEY(S) FOR VERIFICATION OR CLARIFICATION OF MY QUALIFICATIONS FOR MEMBERSHIP.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

**PLEASE CHECK MEMBERSHIP CATEGORY FOR WHICH YOU ARE APPLYING**  
Failure to provide your check and the supporting documentation will delay the approval of application.

**Make check payable to: "PARALEGAL ASSOCIATION OF FLORIDA, INC."**

**MEMBERSHIP CYCLES ARE JULY 1 – JUNE 30 OF EACH YEAR. REGARDLESS OF DATE OF APPROVAL, MEMBERSHIP WILL EXPIRE AND BE UP FOR RENEWAL ON JUNE 30. Please do not send application prorated after May 1, 2006. Applications received after May 1 will be approved for the June 30 date**

**ACTIVE: (\$65.00 PLUS \$15.00 INITIATION FEE FOR FIRST YEAR'S MEMBERSHIP) (\$32.50 PLUS \$15.00 INITIATION FEE PRORATED FOR APPLICATIONS RECEIVED JAN 1 THROUGH JUNE 30)**

- (A) \_\_\_\_\_ Successful completion of Certified Paralegal/Certified Legal Assistant (CP/CLA) examination of National Association of Legal Assistants, Inc. (NALA) (Provide copy of CP/CLA certificate or NALA congratulatory letter.)
- (B) \_\_\_\_\_ Graduation from an American Bar Association (ABA) approved program of study for paralegals. (Provide copy of degree or certificate of completion.)
- (C) \_\_\_\_\_ Graduation from a course of study for paralegals which is institutionally accredited but not ABA-approved, and which requires not less than the equivalent of 60 semester hours of classroom study. (Attach copy of degree AND transcript with total hours earned.)
- (D) \_\_\_\_\_ Graduation from a course of study for paralegals, other than those set forth above, plus not less than 6 months of in-house training as a paralegal. (A copy of certificate AND completion of attorney attestation on page 4 of this application must be submitted with this application.)

Continued . . .

**ACTIVE (continued from page 3)**

- (E)  A baccalaureate degree in any field, plus not less than 6 months of in-house training as a paralegal. (A copy of baccalaureate degree AND completion of attorney attestation on page 4 of this application must be submitted with this application.)
- (F)  A minimum of 3 years of law-related experience under the supervision of an attorney, including at least 6 months of in-house training as a paralegal. (Completion of attorney attestation on page 4 of this application must be submitted with this application AND separate letter from supervising attorney as to 3 years law-related experience.)
- (G)  Two years of in-house training as a paralegal. (Completion of attorney attestation on page 4 of this application AND separate letter from supervising attorney as to 2 years of in-house training as a paralegal must be submitted with this application.)

**STUDENT: (\$35.00 - no initiation fee) (\$17.50 PRORATED FOR APPLICATIONS RECEIVED JAN 1 THROUGH JUNE 30)**

Provide completed School Attestation form below and provide transcript or term bill evidencing required 6 hours of law-related courses OR 3 semester hours or equivalent of law-related courses and separate letter from supervising attorney as to full-time employment in a law-related field.

**ASSOCIATE: (\$60.00 - no initiation fee) (\$30.00 PRORATED FOR APPLICATIONS RECEIVED JAN 1 THROUGH JUNE 30)**

- (A)  Attorney. (Florida Bar Number: \_\_\_\_\_.)
- (B)  Educator. (Provide evidence of same.)
- (C)  Any person having attained the age of 55 years, who formerly would have been eligible for membership because of profession or otherwise. (Provide evidence of same.)
- (D)  Non-resident of the State of Florida who would otherwise qualify for membership.
- (E)  Individuals who have graduated or completed a paralegal program but who have not been employed full-time as a paralegal for at least 6 months. (Provide copy of certificate or degree showing proof of graduation date, if qualifying as a graduate.)

**SUSTAINING: (\$150.00 - no initiation fee) (\$75.00 PRORATED FOR APPLICATIONS RECEIVED JAN 1 THROUGH JUNE 30)**

- (A)  Law firm.
- (B)  Title company.
- (C)  Banking company.
- (D)  Other company providing services either to this organization or to law offices.
- (E)  Other law-related business or enterprise.

Please provide website address to be included on PAF website, [www.pafinc.org](http://www.pafinc.org): \_\_\_\_\_

In the event an application has been pending for a period of 90 days or more due to a deficiency of which the applicant has been informed, and the deficiency remains unsatisfied, PARALEGAL ASSOCIATION OF FLORIDA, INC. will impose a 50% processing fee upon return of the application.

**ATTORNEY/EMPLOYER ATTESTATION**  
(For 6 months in-house training as paralegal only)

I HEREBY ATTEST, pursuant to Fla. Stat. ch. 57.104 and pursuant to Sections "D," "E," "F" or "G" requirements for active membership as referenced in this membership application that \_\_\_\_\_ is employed by me and is recognized as a paralegal, and that she/he meets the criteria of the definition of a paralegal/legal assistant set forth by Fla. Stat. ch. 57.104, to wit: "Legal Assistant" means a person, "who under the supervision and direction of a licensed attorney, engages in legal research, and case development or planning in relation to modifications or initial proceedings, services, processes, or applications; or who prepares or interprets legal documents or selects, compiles, and uses technical information from references such as digests, encyclopedias, or practice manuals and analyzes and follows procedural problems that involve independent decisions." He/She is a person, qualified through education, training, and work experience, who is employed or retained by a lawyer, law office, governmental agency, or other entity in a capacity or function which involved the performance, under the ultimate direction and supervision of an attorney, of specifically-delegated substantive legal work, which work, for the most part, requires a sufficient knowledge or legal concepts that, absent such paralegal, the attorney would perform the task. I FURTHER ATTEST that the applicant qualifies for membership pursuant to the Section "D," "E," "F" or "G" requirements for Active membership as referenced in this application and has been employed by me as a paralegal, that the applicant's ethical and professional conduct are above reproach, and that the applicant is recommended by me for membership in PARALEGAL ASSOCIATION OF FLORIDA, INC.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

FIRM NAME AND ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE \_\_\_\_\_ ZIP: \_\_\_\_\_ FLORIDA BAR NUMBER: \_\_\_\_\_

**SCHOOL ATTESTATION**  
(Must Be Completed In Full)

I HEREBY ATTEST that \_\_\_\_\_ is currently enrolled for \_\_\_\_\_ semester hours or the equivalent, in the Paralegal program at \_\_\_\_\_, located at \_\_\_\_\_, which program is fully accredited by \_\_\_\_\_.

**(PROVIDE COPY OF TRANSCRIPT OR TERM BILL EVIDENCING REQUIRED HOURS OF LAW-RELATED COURSES)**

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

TITLE: \_\_\_\_\_

**CHANGE OF MEMBERSHIP STATUS:** When the eligibility requirements for Active membership are met, a Student or Associate member may request a change of status from "Student" or "Associate" to "Active" Membership upon completion of an Application For New Membership, accompanied by supporting documentation, active member dues, and the applicable initiation fee.