

SAMPLE LAW FIRM

**ATTORNEY CAREER ADVANCEMENT
PROGRAM**

January 1, 2024

I. PURPOSE & OBJECTIVES

- A. The purpose of this program is to provide attorneys employed by Sample Law Firm.(the “Firm”) as of January 1, 2024, with a career advancement program designed to assist the firm and its attorneys in assessing both short-term performance and long-term career potential.
- B. The program is intended to provide a framework for a performance management system,which is ongoing and developmental in nature.
- C. The following tiers (classes of attorneys) are established.
 - Associate
 - Senior Associate
 - Income Partner
 - Equity Member
 - Of Counsel (4 types as described in ABA Formal Opinion 90-357 dated May 10, 1990)
 - 1. Part-time practitioner
 - 2. Retired partner
 - 3. Probationary partner-to-be
 - 4. Permanent (non-partner track)
- D. The program is further intended to establish, and outline competencies and performance criteria required for consideration/admission for attorneys employed as of January 1, 2024.
- E. The overall goal of the program is to have a system that establishes criteria for consideration/admission for each tier and provides a mechanism to evaluate performance andprogression to each tier for attorneys that are working to maximize the goals of the firm.

II. EFFECTIVE DATE

The effective date of policies and procedures outlined herein shall be January 1, 2024.

III. AMENDMENTS

- A. The overall goal of the program is to have a system that establishes criteria for consideration/admission for each tier and provides a mechanism to evaluate performance andprogression to each tier for attorneys that are working to maximize the goals of the firm.
- B. This program is designed as a guide to the firm’s approach to considering attorneys for each tier and is not a guarantee of advancement to each tier/class or a contract of employment.

- C. The firm has the right to make unilateral changes to the program at any time.
- D. Attorneys acknowledge that they have received and read the materials presented in these guidelines.
- E. Attorneys also understand that these guidelines supersede all previous programs, policies, and procedures, if any, issued by the firm.

IV. ELIGIBILITY/CONSIDERATION CRITERIA

Our attorney career advancement philosophy is designed to provide attorneys with the information, guidance, and support they need to maximize their experience at the Firm. We are committed to supporting and empowering our attorneys to thrive in their work, their client relationships and in their communities. Our commitment to these values and ideals is described in more specific terms below.

Firm Objective

Our primary objective is to be the premier law firm in our practice space locally and throughout xxx. To accomplish this objective, we aggressively strive to meet the needs of our clients with excellence and efficiency, while maintaining the highest professional standards. We also strive to do everything possible to make the Firm a great place to work for all attorneys and professional staff.

Attorney Career Paths

The career path for any one attorney is dependent upon that individual attorney's experience level and overall contribution to the Firm's objectives. Though there is no precise moment at which an attorney can expect to move from one position to the next, an attorney who joins the Firm at or near the beginning of her legal career can expect to progress in accordance with the following general parameters:

Position	Expected Timeline to Position Elevation/Promotion
Associate	Entry Level
Senior Associate	1-2 Years
Income Partner	3-4 Years
Equity Shareholder	5-7 Years

For individuals entering the firm with more experience, the path is more flexible. Specifically, completion of some or all of the pre-partner positions may not be required, and the rate of progression will take into consideration the attorney's experience level, his or her ability to manage and direct simple to very client projects, and her ability to attract and garner new business within the Firm's general areas of expertise.

For attorneys seeking alternative career paths, we try to be flexible in order to accommodate attorneys at different stages of their careers for whom a traditional model may not represent the best fit. For instance, on a limited basis, we offer reduced billable

hour requirements as part of a modified compensation package for attorneys who seek an adjustment in order to achieve their desired work/life balance. Also, we have the “of counsel” tier that can be structured in flexible ways to accommodate the particular needs to various attorneys.

Associate

As an Associate you can expect a wide variety of work on client projects and will help develop our cases by conducting research, drafting documents, and participating in meetings with clients and witnesses. From the outset, even our newest and youngest lawyers have frequent contact with clients. Depending on their demonstrated abilities, associates are also afforded opportunities to handle more advanced tasks as they demonstrate their skills and competencies. Ultimately, the type of work handled by associates is limited only by their motivation and capabilities.

Senior Associate

Senior associates, depending upon their demonstrated abilities, often function just like partners in regard to their handling and management of client projects, the extent of their client contact, and their independence in decision-making on client projects. The Firm views the senior associate position as a transition phase from associate to partner.

Income Partner

The position of Income Partner is reserved for attorneys who have demonstrated, through prior experience, the ability to: (1) successfully manage and resolve the Client’s projects; (2) effectively nurture and manage client relationships; and (3) maintain positive and productive relationships with the Firm’s attorneys and staff. The pursuit and development of new lines of business is not a requirement for elevation to a position of Income Partner, but such initiatives will often expedite the process, as well as create opportunities for a potential equity membership position. Income Partner partnerships do not involve an ownership interest in the Firm but do create opportunities for larger bonuses and business development, as well as more significant input into the management and direction of the Firm.

Equity Member

The Firm does not offer promises of equity membership. Nonetheless, ownership interests in the Firm are attainable for attorneys who satisfy the Firm’s expectations for

partners as described above and demonstrate an ability to attract new business that significantly increases the Firm's overall profitability in a manner that increases career opportunities throughout the Firm.

Business Development

Attorneys are not expected to generate new business in order to progress to a position of income partner, as distinguished from equity shareholder. In that regard, the Firm recognizes that it takes the contribution of all of its attorneys to enable the Firm to reach its goals and objectives, and that the successful completion of assignments and the highest quality delivery of legal services are the primary and most reliable means of retaining existing business and generating new business. Nevertheless, an attorney's ability to attract and generate new business significantly benefits the Firm, can provide the attorney with substantial flexibility and opportunities to advance her career, and represents a primary means of achieving an equity interest in the Firm. As a result, the Firm is committed to providing its attorneys with the guidance and support necessary to facilitate those efforts. We encourage attorneys to pursue publishing opportunities, take advantage of speaking opportunities (most of the organizations with which we intersect periodically sponsor seminars and actively seek speakers), and participate in bar organizations and other networking opportunities. For all attorneys interested in pursuing these opportunities we will provide technical support by collaborating on and editing any submissions for publication and/or preparing materials for use in speaking presentations. We will also help to facilitate those publication and speaking opportunities. The firm will also fund reasonable requests to attend relevant events and seminars, and to facilitate social opportunities (i.e., lunches, dinners, golf outings, etc.) at which business relationships can be developed and nurtured.

Attorney Reviews

The firm formally reviews attorneys once per year in November. This review focuses on the attorney's performance for the preceding year in regard to the quality of work, the quantity of work, and the attorney's satisfaction of expectations for continued progression along the Firm's career advancement path. The review is intended to be a two-way process, and we welcome attorney suggestions and input into ways to better the Firm both generally and specifically in regard to our commitment to attorney career path objectives. Our attorneys can generally expect to receive a compensation increase during each attorney review consistent with the attorney's satisfaction of the Firm's

expectations and the overall performance of the Firm.

Bonuses

Associate and Senior Associate Attorney bonuses are distributed once at the end of the calendar year but may be supplemented with special performance bonuses. The amount of the year-end bonus is discretionary and dependent on a variety of factors, including the quality of work, meeting or exceeding billable hourly requirements, contributions to the firm's collaborative work environment, business development activities, and the overall performance of the firm during the relevant time period. Income Partner bonuses are distributed once at the end of the calendar year based upon a targeted share of Firm net profit as determined by the Managing Shareholder. In order for the year-end bonus to be paid in December, the relevant time period for calculating the quantity of work element of the bonus runs from December 1 of the preceding calendar year through November 30 of the year in which the bonus is paid.

Managing Member

(Date) _____

Associate

(Date) _____
(Signature acknowledges that this document has been reviewed with associate. It does not imply agreement with content.)