

Part 1

1. Personnel Costs (for work dedicated to unauthorized practice of law matters):

Employee:

Name

Position/Duties

- A. Salary documentation for quarter: \$
(including payroll taxes, retirement plans, and other fringe benefits; please list separately).
- B. Percentage of work dedicated to unauthorized practice of law matters during Quarter: %
- C. Expenses for this employee (A x B): \$

Employee:

Name

Position/Duties

- A. Salary documentation for quarter: \$
(including payroll taxes, retirement plans, and other fringe benefits; please list separately).
- B. Percentage of work dedicated to unauthorized practice of law matters during Quarter: %
- C. Expenses for this employee (A x B): \$

Employee:

Name

Position/Duties

- A. Salary documentation for quarter: \$
(including payroll taxes, retirement plans, and other fringe benefits; please list separately).
- B. Percentage of work dedicated to unauthorized practice of law matters during Quarter: %
- C. Expenses for this employee (A x B): \$

Employee:

Name

Position/Duties

- A. Salary documentation for quarter: \$
(including payroll taxes, retirement plans, and other fringe benefits; please list separately).
- B. Percentage of work dedicated to unauthorized practice of law matters during Quarter: %
- C. Expenses for this employee (A x B): \$

TOTAL PERSONNEL COSTS: \$

(Use additional sheets if necessary)

Part 2

2. Postal and Delivery Charges

Regular Postal Charges for UPL Related Functions
(Attach documentation): \$

Other Delivery Charges for UPL Related Functions \$

Total Postal and Delivery Charges \$

3. Long Distance Telephone Charges

Long Distance Telephone Charges for UPL Related Functions \$

4. Local Telephone Charges and Other Appropriate Charges \$

5. Dedicated Telephone Lines \$

6. Subscriptions, Law Books, and Other Legal Research Services and Materials (Attach invoices)

A. \$

B. \$

\$

7. Organizational Dues and Educational Expenses

A. *Organizational Dues Relating To UPL*

	<u>Organization</u>	<u>Dues</u>
1.		\$
2.		\$
3.		\$
4.		\$

B. *Educational Expenses Related to UPL*

	<u>Function/Activity/Item</u>	<u>Cost</u>
1.		\$
2.		\$
3.		\$
4.		\$

8. Cost of Defending UPL Related Lawsuits

Cost of defending UPL related lawsuits not covered by insurance, and excluding any award to an adverse party of damages, attorney fees, or costs; as well as any settlement between parties wherein costs, or attorney fees are reimbursed by the opposing party. (Attach copy of complaint, answer, judgment entry, settlement agreement or consent decree, invoices, and other documentation necessary to substantiate the expense). Please state if you have insurance coverage for this type of litigation and if so, the name of the insurance carrier and the dollar amount of the deductible.

Total \$

Insurance Carrier

Amount of Deductible

9. Overhead Expenses

Include only the percentage of costs directly attributable to UPL matters). (Itemize and attach copies of invoices or explanation as to how costs are derived, as applicable. With the exception of professional liability insurances premiums, expenses in this category may not exceed \$3,500.00 annually.

A. Rent \$

1. Total rent paid by bar association
\$

2. Percentage of space dedicated to UPL
%

3. Rent expense (1) x (2)
\$

B. Insurance (including contents, valuable papers, data processing equipment, commercial general liability, commercial umbrella, association professional liability).

\$

C. Supplies and Equipment \$

D. Accounting Costs \$

E. Occupancy (other occupancy costs, if any) \$

F. Utilities \$

G. Office Expenses \$

H. Repair & Maintenance \$

I. Other Overhead Expenses (Specify) \$

TOTAL OVERHEAD EXPENSES \$

- % of total annual bar association costs attributable to UPL related activities.

