



The purpose of this Coverage Policy is to set forth the amount of coverage provided for all legal issues.

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### **INCLUDED IN MEMBERSHIP**

*(Member is not responsible for any legal fees, except for costs)*

#### **Initial Consultation**

- Explain Member's rights & options
- Provide legal opinion & suggested course of action

#### **Advertising**

- Advertising assistance & compliance

#### **Bankruptcy**

- Chapter 7 preparation, filing & representation

#### **Corporate Matters**

- Modify and/or amend organization documents
- Prepare and file Statement of Information and other Secretary of State filings
- Prepare corporate minutes

#### **Debt Collection**

- Assist in collecting invoices from patients/customers

#### **Debt Collection Defense**

- Negotiate repayment schedules with creditors
- Assist in limiting creditor harassment
- Full representation in defense for any action for personal and business debt collection

#### **Document Review**

- Unlimited review of documents

#### **Document Preparation**

- Unlimited drafting & preparing of documents

#### **Employment Issues**

- Draft & review Employment Contracts/Agreements, Independent Contractor Contracts/Agreements
- Prepare Employee Handbooks & Policy Manuals
- Draft & review Confidentiality Agreements, Non-Disclosure Agreements & Non-Compete Agreements
- Advice regarding employee termination
- Employment eligibility verification
- Assistance with California Employment Development Department reporting requirements and filings

#### **Estate Planning**

- Estate Planning consultation

#### **HIPAA**

- Assistance in compliance with HIPAA Privacy Policy

#### **Identity Theft**

- All issues & services related to identity theft protection

#### **Incorporation**

- Advise Member regarding selection of appropriate business entity and business name availability
- Draft and file Incorporation documents
- Obtain permits, licenses & fictitious business names
- Prepare organizational documents including bylaws, buy-sell agreements, partnership agreements, operating agreements & initial minutes
- Prepare and file application for Federal Tax ID Number (EIN)

#### **Insurance Claim Disputes**

- Review of documents
- Assistance in disputes with insurance companies regarding claims

#### **Intellectual Property**

- Advise Member on probability of filing trademark & draft opinion on trademark search results
- Advise Member on probability of filing copyright
- Draft and review Intellectual Property Licensing Agreements

#### **Landlord/Tenant**

- Draft, review & negotiate commercial lease agreements
- Advise Member on Landlord/Tenant issues

#### **Purchase, Sale or Lease of Equipment**

- Draft, review & negotiate Purchase, Sale or Lease Agreements

#### **Purchase or Sale of Existing Practice**

- Evaluation of prospective business practice
- Draft, review & negotiate Sale of Assets Agreements & Sale of Stock Agreements

#### **Purchase or Sale of Real Property**

- Assist in the sale, purchase and/or refinancing of real property

#### **Small Claims Court Assistance**

- Provide advice on small claims court procedures
- Assist in preparation of appropriate documents
- Provide advice on evidence, documentation & witnesses
- Assist in trial preparation

### **DISCOUNTED RATE**

*(Member receives 40% discount off Law Firm's regular hourly rates)*

#### **Bankruptcy**

- Chapter 11 preparation, filing & representation
- Chapter 13 preparation, filing & representation

#### **Civil Litigation Defense**

- Full defense in civil proceedings in Civil Court, before an administrative agency or before a local, state or federal agency (\*Except Malpractice actions - see below)

#### **Civil Prosecution**

- All services relating to the bringing of a civil lawsuit or proceeding

#### **Corporate Matters**

- Advise and assist in dissolving practice

#### **Employment Issues**

- Defense of discrimination and/or harassment claims filed with the Fair Housing and Employment Department
- Defense of discrimination and/or harassment claims filed in Civil Court

#### **Estate Planning**

- Drafting & reviewing of wills and subsequent amendments
- Drafting & reviewing of trusts (revocable/irrevocable living trusts, life insurance trusts, testamentary trusts) and subsequent amendments
- Drafting & reviewing of living wills/health care directives and subsequent amendments
- Assistance in administering deceased Member's estate
- Assistance in administering estate if Member is the Executor/Administrator

#### **Insurance Claim Disputes**

- Filing of lawsuit and subsequent representation

#### **Intellectual Property**

- Prepare and file State and/or Federal Trademark Applications
- Prosecute or defend trademark infringement actions
- Prepare and file Federal Copyright Registration
- Prosecute or defend copyright infringement actions
- Prepare and file Federal Patent Application
- Prosecute or defend patent infringement actions

#### **Landlord/Tenant**

- Filing of unlawful detainer action on behalf of landlord
- Defending against unlawful detainer action on behalf of tenant

#### **Malpractice Defense Advisory**

- All issues & services relating to a malpractice defense action not covered by existing malpractice insurance

#### **Tax**

- All issues & services relating to tax including IRS audit protection

#### **Miscellaneous**

- All other matters not discussed in Coverage Policy