

GREAT LAKES LAW REFERRAL REPORTING POLICY

The Great Lakes Law network exists to afford member firms opportunities to enhance services to clients. Referrals of business is one of the reasons for membership in Great Lakes Law. Therefore, when an opportunity for referring work to another province or state occurs or when specialized services are needed, every effort should be made to refer the client to another Great Lakes Law firm.

Because one of the measures of Great Lakes Law's value to member firms is revenue from referrals, it is mandatory that each firm develop and maintain an effective system for identifying and reporting referral activities. The system must be able to identify in-coming and out-going referrals and to provide current accounting information on the billing status of the work.

Firm policies and reporting systems must allow for all work which originates from a Great Lakes Law referral to be tracked for as long as the firm receiving the referral maintains a relationship with the client.

Firms are required to report on all referral matters to the Network Administrator when they occur or at least on a monthly basis. Referral activity reports will be issued no less often than quarterly by the Network Administrator. The report will include the names of the client and matter; the referring firm, the receiving firm and the amount of fees billed and collected by the receiving firm. Firms are expected to maintain regular communication regarding the status of referral matters.