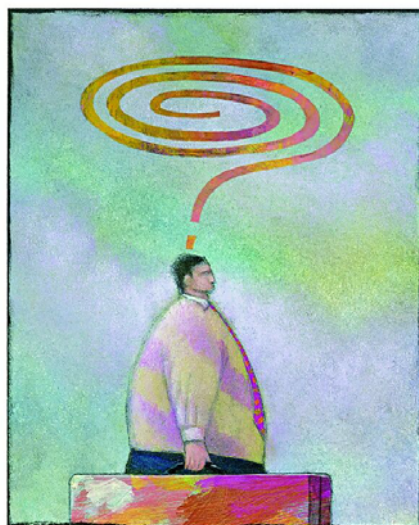


Utah State Bar



INITIAL MEETING GUIDE

for use during the initial meeting between the
Mentor and New Lawyer

Resources for
New Lawyers and Mentors

www.utahbar.org/nlp

New Lawyer Training Program



INITIAL MEETING GUIDE

WHAT	MENTOR	NEW LAWYER
Come prepared	Learn what you can about your new lawyer prior to your initial meeting.	Learn what you can about your mentor prior to your initial meeting.
Tell mentor's career story	Tell mentor's career story. Tell a brief career story, including a description of your mentors and their lessons. If you lacked mentors, describe how it impacted your career.	Listen. Ask questions.
Discuss new lawyer's needs	Discuss. Listen. Ask questions.	Explain your career goals, including practice areas of interest to you.
Review enrollment process and compliance deadlines	Explain—clearly—the enrollment process and the compliance deadlines.	Acknowledge your understanding of the enrollment process and compliance deadlines.
Review the Compliance Checklist (in Appendix of Forms).	Determine whether you have submitted a Mentor Volunteer Form and are currently serving as an appointed mentor. If you are not currently serving under a term of appointment, be prepared to execute a Mentor Volunteer Form and give it to your new lawyer for submission along with other pertinent documents.	Review the Compliance Checklist in advance. Be ready to prepare and assemble the pertinent documents.
Determine if your firm or organization has a Master mentoring plan on file. (See next item below if no Master mentoring plan is in place.)	Confirm that the existence of a master mentoring plan for your organization removes the need for your new lawyer and mentor to individually prepare and submit a written plan. (See next item below if no Master mentoring plan is in place.)	Complete the applicable item of the Compliance Checklist accordingly. (See next item below if no master mentoring plan is in place.)

New Lawyer Training Program



Review the Model Mentoring Plan at www.utahbar.org/nltp .	Explain that the model plan is a guide. It can be, and should be, adjusted for new lawyer's specific practice areas.	Review the model plan in advance. Be ready to discuss an individualized plan.
Set timetable for submitting Compliance Checklist and applicable items.	Set date (considering compliance deadline) for finalizing all items on Compliance Checklist and submitting all pertinent enrollment materials to the Program Administrator.	Assume responsibility for preparing, assembling, and submitting enrollment materials.
Agree on meeting times and who will set them.	Inform the new lawyer of your schedule, generally, including convenient vs. inconvenient times to call, etc.	Agree to organize your time so as to make efficient use of the mentoring meetings. Be considerate of mentor's work schedule.
Agree to be candid about any problems.	Explain that you will inform new lawyer if a problem arises in the mentoring relationship, or if a desired result is not being obtained.	Explain that you will inform mentor if a problem arises in the mentoring relationship, or if a desired result is not being obtained.
	Areas Below Left Blank For Additional Notes:	