



Serve MN: Real Help from Lawyers for Families Dealing with Dementia

Information for Volunteer Attorneys

The Elder Law Section of the Minnesota State Bar Association thanks you for your interest in Serve MN. Serve MN is a program created and operated by the Elder Law Section in partnership with the Alzheimer's Association of Minnesota and North Dakota to provide important information and resources to individuals recently diagnosed with Alzheimer's and to their families. Through your participation with Serve MN, you will provide basic information about long-term care planning, estate planning and end-of-life planning to people dealing with a recent Alzheimer's diagnosis.

Volunteer attorneys must complete an enrollment form, certifying that they meet the following requirements for participation in Serve MN:

- That they are admitted to practice law in Minnesota; AND
- That they are in good standing with the Minnesota Supreme Court; AND
- That they are members of the Minnesota State Bar Association Elder Law Section; AND
- That they are covered by professional malpractice insurance; AND
- That they have three or more years of elder law practice experience; OR
- That they have less than three years of elder law practice experience, but have attended a full day of continuing legal education on the subject of Medical Assistance and have a mentor-mentee relationship with an attorney with at least three years of elder law practice experience.

After submitting an enrollment form, volunteer attorneys will be put on a referral list maintained by Serve MN. The Alzheimer's Association will make referrals of individuals seeking services through Serve MN. These individuals will be given the name and contact information of a volunteer attorney by the Serve MN coordinator (currently Jennifer Wright of the University of St. Thomas School of Law Legal Services Clinic). Referrals will be made in a rotation based on how

recently the volunteer attorney has received a referral and the geographic locations of the volunteer attorney and of the individual seeking assistance.

You, as the volunteer attorney, will receive a call from the Serve MN coordinator, giving you the name of the individual who has been referred to you. The individual will contact you, and you will arrange with the individual the best time, date, and venue for you to discuss the individual's situation, concerns and questions and to provide the relevant information.

At the meeting, you will learn the basic facts of the individual's situation and explain what legal issues and concerns are relevant to that situation. You will give the individual basic information about the legal documents and other actions that are frequently necessary to plan for the needs of an individual with dementia, including information about public benefits to pay for long-term care. You should be aware of the duties owed to the individual(s) under the Minnesota Rules of Professional Conduct and apply your normal procedures for ensuring that those duties are met.

You must give the individual a copy of the List of Legal Resources provided to you by Serve MN. You must inform the individual that he or she is under absolutely no obligation to retain you, or any other attorney on the List of Legal Resources, to represent him or her. If the individual chooses to retain you or any other attorney for legal representation related to the Alzheimer's diagnosis, then she or he must discuss and agree upon payment for legal services with that attorney at that time.

We will ask you to provide feedback to Serve MN regarding whether and when the individual made contact with you, whether and when you met with the individual, and any suggestions you may have for improving the work of Serve MN.

Attorneys who volunteer with Serve MN will receive special recognition for their work from the Elder Law Section, including an electronic participation badge to display on their website and recognition at the annual Elder Law Institute.

Thanks again for considering volunteering with Serve MN to help individuals diagnosed with Alzheimer's disease pursue peace of mind and legal protection of their rights and well-being. Your service is very much appreciated.