



OFFICE OF LEGAL SERVICES INNOVATION
An Office of the Utah Supreme Court

Legal Sandbox Authorization Materials

Blue Ridge Law Group

August 22, 2022

Contents

1. Utah Supreme Court Amended Order for Authorization to Practice Law
2. Innovation Office Recommendation to the Court

Document 1

In the Supreme Court of the State of Utah

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In re: Application of Blue Ridge Law Group

AMENDED ORDER FOR AUTHORIZATION TO PRACTICE LAW

Based upon the Utah Supreme Court's plenary and constitutionally granted authority to regulate the practice of law in Utah, and the tenets of Standing Order 15, the Utah Supreme Court orders that Blue Ridge Law Group ("Blue Ridge") is authorized to practice law within the regulatory sandbox and subject to the restrictions outlined below.

The Court has reviewed the recommendation of the Office of Legal Services Innovation ("Innovation Office") dated February 23, 2022, for Blue Ridge to be authorized to practice law.

Blue Ridge is a law firm managed by both non-lawyers and lawyers who seek to represent Utah plaintiffs harmed by products and medications in mass tort and personal injury litigation.

The Innovation Office has assessed the risk of harm to Blue Ridge's targeted consumers relative to the risk of harm they currently face and has determined that the risk of harm presented by Blue Ridge's service is Low.

In light of the Court's responsibility to the public to effectively regulate the practice of law in Utah and in keeping with the tenets of Standing Order 15, the Court now orders as follows:

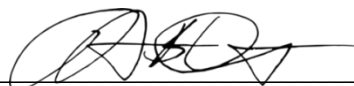
1. Blue Ridge is authorized to offer legal services through the following models:
 - a. Lawyer employed or managed by a nonlawyer
 - b. Lawyers sharing profits with nonlawyers
 - c. Nonlawyer ownership

2. Blue Ridge is authorized to provide legal services across the following legal service areas, subject to the restrictions outlined below:
 - a. Accident / Injury
3. Blue Ridge shall conform to the Low Innovation reporting requirements imposed by the Innovation Office.
4. Blue Ridge will prominently display the following disclosure requirements:
 - a. Innovation Office Badge
 - b. Nonlawyer ownership disclosure

If Blue Ridge wishes to alter these conditions or requirements, it must submit any such change to the Innovation Office for further assessment. The Innovation Office will assess the proposed change and may permit the change if it deems the change does not materially increase the risks to consumers. If the Innovation Office finds a material increase in risk then it will present the issue to the Court for further consideration.

This authorization is granted for the duration of the existence of the Sandbox, or until exit and permanent licensure at the discretion of the Court. Authorization is subject to Blue Ridge's compliance with the conditions and requirements set forth in the Innovation Office Manual and the Innovation Office Recommendation to the Court and to a verification by the Innovation Office that the company's services are not causing material harm to consumers.

DATED this 16th day of August, 2022.



Matthew B. Durrant
Chief Justice

Document 2



Recommendation to the Court

App No.0053 - Blue Ridge Law Group

Mar 9, 2022

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Executive Summary

Recommendation: Authorize

Applicant: Blue Ridge Law Group

Proposed Model/Service: Blue Ridge is a law firm managed by both non-lawyers and attorneys who seek to represent Utah plaintiffs harmed by products and medications in mass tort litigation.

Target Consumer Market: Consumers of corporate products/medications who have been harmed and seek representation in mass tort litigation.

Sandbox Qualifiers: This business model/service qualifies for the Sandbox because it would feature the following characteristics:

- Lawyers employed or managed by nonlawyers
- Nonlawyer ownership less than 50%
- Lawyers sharing fees with non-lawyers

Regulatory Objective Qualifier:¹ The proposal meets the Regulatory Objective in that it seeks to provide Utah consumers with accessible legal representation in the event of product harm by allowing lawyers to accept investment from non-lawyers and have ownership interest in the firm.

Utah Qualifier: Adapted for Utah requirements. Blue Ridge Law Group includes a Utah attorney and their campaign will solicit Utah Plaintiffs.

Implementation Qualifier: Ready for immediate implementation

Risk Assessment

General Assessment: LOW

Specific Risks:

1. Non-lawyer ownership less than 50%
2. Lawyers sharing fees with non-lawyers
3. Lawyers employed or managed by non-lawyers

¹ Regulatory Objective: To ensure consumers have access to a well-developed, high-quality, innovative, affordable, and competitive market for legal services. (Standing Order No. 15)

Sandbox Recommendation

We recommend the Court authorize Blue Ridge Law Group to practice law in the state of Utah, subject to such requirements as the Innovation Office may impose.

Scope of Recommended Authorization

Term of authorization	The Innovation Office recommends that the authority be granted for an initial period of 48 months from the date of service launch with the possibility of extension or permanent authorization. Any such extension or permanent authorization would be subject to the applicant complying with the conditions and requirements set forth below and also to a verification by the Innovation Office that Blue Ridge has a record of compliance with all requirements and the company's services are not causing harm to consumers.
Recommended legal service models	This section presents a numbered list of the recommended service models. <ol style="list-style-type: none">1. Lawyer employed or managed by a nonlawyer2. Lawyers sharing fees with nonlawyers3. Less than 50% nonlawyer ownership
Legal service models not recommended	None
Recommended consumer service areas	<ol style="list-style-type: none">1. Accident / Injury
Recommended waivers	None
Recommended qualitative compliance requirements	Standardized disclosure statements on website and in mobile applications (see Manual): <ol style="list-style-type: none">1. Badge2. Nonlawyer ownership disclosure <p>Lawyers working with Blue Ridge Law Group are always required to comply with their duties imposed through the rules of professional conduct including the disclosure requirements of Rule 5.4.</p>
Recommended data reporting requirements	Low risk data reporting requirements (see Manual)
