



CONFIDENTIAL  
BIOGRAPHICAL DATA

*IN SUPPORT OF PROPOSAL FOR FELLOWSHIP*

Revised Sept 2023

**CONFIDENTIALITY**

Consideration of lawyers for Fellowship in the American College of Trial Lawyers is a confidential process from beginning to end.

Section 3.3(f) of the *ACTL Bylaws* provides:

*All discussions, proceedings, letters and reports incident to proposals and nominations for Fellowship shall be held in strictest confidence. Except as provided in Section 3.3(d), no person shall be informed, directly or indirectly, that he or she is under consideration for nomination, or has been nominated for election to Fellowship.*

Free and frank discussion and evaluation of a candidate are essential elements of an informed selection process. To achieve this degree of candor, those involved at every stage must be comfortable that the information and materials developed in the committee's investigation, the discussions and vote before the committee, the Confidential Poll, the Regent's investigation, and the discussion and vote of the Board of Regents will not be disclosed, whether the nominee is inducted or not.

During the investigation, Fellows interviewed should be advised that their comments and opinions may be presented to the committee when the report is made, but without attribution, unless the informant agrees to be identified.

The candidate should never know that he or she is being considered or has ever been considered for Fellowship, unless and until notified by the College President that the nomination has been pre-approved. It is then that the nominee is asked to submit the *Statement of Qualifications*, which must be accepted by the Board of Regents as a condition to election and induction.

Those outside the Fellowship, including those interviewed during the investigation, must not know that the candidate is being considered for Fellowship, unless and until the nominee has been notified of his or her election and has been invited by the President to appear for induction.

There are various methods of balancing the tension between the need for extensive information on the one hand, as manifested by the *Biographical Data* form, and confidentiality on the other. These are addressed in the *Manual for State and Province Committees*. Also, the State or Province Chair, experienced committee members and the assigned Regent may assist the investigator in achieving this delicate, but essential balance.

See *Manual for State and Province Committees, Nomination of Fellows* Section B.

AMERICAN COLLEGE OF TRIAL LAWYERS

CONFIDENTIAL BIOGRAPHICAL DATA  
IN SUPPORT OF PROPOSAL FOR FELLOWSHIP

Date: \_\_\_\_\_

To the State/Province Committee of

\_\_\_\_\_ for the AMERICAN COLLEGE OF TRIAL LAWYERS:

1. **Candidate:**

Name: \_\_\_\_\_

Birth Date: \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_

Names of Fellows of the College in Nominee's firm

\_\_\_\_\_  
\_\_\_\_\_

2. **Background:**

a. List all colleges and law schools attended, including dates of attendance and degrees awarded.

b. List any school honors, honor societies and school achievements deemed relevant.

## APPENDIX I

- c. List jurisdictions in which the candidate is admitted to practice law, including federal courts.
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
- d. List locations and inclusive dates of all professional employment, identifying law firms, proprietorships, clerkships and other law-related employment, e.g., corporations, government, military.
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
- e. List relevant CLE, other teachings and published legal writings. If the candidate has actively taught CLE or produced legal writings, list the specific activities and cite the relevant publications or legal work.
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
- f. List all professional associations, bar associations and specialty group memberships, including positions held.

## APPENDIX I

- g. List honors, prizes, awards and other forms of recognition received
  
- h. List non-professional activities (business, charitable, public service and political, etc.) subsequent to admission to the bar. Include positions held.
  
- i. Provide details and attach copies of lawyer advertising, beyond the ordinary listing of name and firm in telephone directories, legal directories or similar publications. Attach copies of any published advertising material.

### 3. **Qualifications:**

- a. From personal knowledge or investigation, has the candidate been licensed to practice for a minimum of 15 years and is actively engaged in trial practice?
  
- b. Does the candidate currently appear in court on a regular basis? If so, list the jurisdictions in which the candidate appears.

**APPENDIX I**

c. Advertising:

Does candidate's advertising and social media conform to the College's Statement of Advertising and Use of Social Media?

\_\_\_\_\_ Yes                      \_\_\_\_\_ No

View the Statement on the website in the Chair's Toolkit under Helpful Materials or click [here](#)

d. Disciplinary matters:

(1) Has the candidate been disciplined or the subject of a formal or informal disciplinary investigation by any court, bar association, disciplinary committee, administrative agency or other professional organization for unethical or unprofessional conduct?

(2) Has the candidate ever been personally sanctioned, monetarily or otherwise, by any court or other tribunal?

(3) Has the candidate ever been arrested, charged, indicted, convicted or pleaded no contest to any crime, other than minor traffic or other violation for which a court appearance was not required?

4. **Trial Experience:**

a. State the candidate's field of practice, specialty and types of cases generally handled.

b. For the candidate's entire professional career, approximate the following:

(1) Number of cases tried to a conclusion. \_\_\_\_\_

(2) Number of cases worked and settled. \_\_\_\_\_

(3) Number of appeals argued. \_\_\_\_\_

c. For the last five (5) years, approximate the following:

(1) Percentage of time devoted to trial and litigation matters, exclusive of mediation.

\_\_\_\_\_ %

(2) Percentage of time devoted to other matters, e.g., mediation, other legal matters, firm administration, associations, charitable work, public service, service as arbitrator or mediator:

\_\_\_\_\_ %

d. Attach a LIST OF TRIED CASES.

Because a strong showing of seasoned trial experience is required, a list of tried cases should accompany the Proposal. To the extent possible for each case, the Case List should include:

- (1) Full case name;
- (2) Court of appearance/Case number;
- (3) Name, phone and email of the presiding judge;
- (4) Year;
- (5) Length of trial;
- (6) Description/nature of case;
- (7) If jury trial, bench trial, other;
- (8) Disposition and outcome of trial;
- (9) Name, phone and email of opposing counsel and names of Fellows familiar with the case.

Significant cases settled prior to commencement of trial should be included. The candidate's qualifications may be demonstrated or supplemented by small-volume trials involving complex or protracted litigation.

The purpose of the Case List is to demonstrate the candidate's extensive trial experience and competence over the requisite period of years.

AMERICAN COLLEGE OF TRIAL LAWYERS

**CASES TRIED**  
**AND OTHER SIGNIFICANT CASES LITIGATED<sup>1</sup>**

Case Name	
Court/Case No.	
Judge (Name, Phone, Email)	
Year	
No. of Trial Days	
Description/Nature of Case	
Jury/Non-Jury	
Disposition/Outcome	
Opposing/Co-Counsel (Name, Phone, Email)	

---

<sup>1</sup> Significant cases settled before trial may also be included, bearing in mind that the purpose is to demonstrate extensive trial experience and competence over the requisite period of years. On the other hand, a candidate's qualifications may be evident, despite a smaller volume of trials as where the practice consists of complex



**APPENDIX I**

Case Name	
Court/Case No.	
Judge (Name, Phone, Email)	
Year	
No. of Trial Days	
Description/Nature of Case	
Jury/Non-Jury	
Disposition/Outcome	
Opposing/Co-Counsel (Name, Phone, Email)	

Case Name	
Court/Case No.	
Judge (Name, Phone, Email)	
Year	
No. of Trial Days	
Description/Nature of Case	
Jury/Non-Jury	
Disposition/Outcome	
Opposing/Co-Counsel (Name, Phone, Email)	

- e. Describe FIVE of the more-significant litigated matters the candidate has handled and provide appellate case citations if an appeal was filed. The purpose of information regarding significant cases is to demonstrate the type and quality of the candidate's trial practice.

5. **Personal Investigation:**

The investigating Fellow is to submit an oral report to the State or Province Committee. The report should include assessments and opinions of the candidate's trial skills, character, ethics and professionalism provided by interviews with Fellows, Judicial Fellows, other judges and lawyers. The information should provide specific focus on information obtained from individuals reporting trial experience with the candidate.

*NOTE: Unfavorable comments and opinions should not be attributed to identified speakers if so requested.*

6. **References:**

- a. List the names and telephone numbers of state and federal court judges familiar with the candidate's character and qualifications as a trial lawyer.
  
- b. List College Fellows familiar with the candidate's character and qualifications as a trial lawyer.
  
- c. List names and telephone numbers of competent non-Fellow trial lawyers who have tried cases with the candidate who may be familiar with the candidate's character and trial ability.

7. **Conclusion:**

Provide any further information you deem pertinent to the candidate's qualifications

**APPENDIX I**

\_\_\_\_\_  
(Proposer) (Investigating Fellow) Signature

\_\_\_\_\_  
Typed or printed name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone number

\_\_\_\_\_  
Email