

## **ATTORNEY-CLIENT ENGAGEMENT AGREEMENT**

The Attorney-Client Engagement Agreement (“Agreement”) is entered into by and between the School Board of Palm Beach County, Florida (“Client” or “Board” or “District”) and Wagstaff & Cartmell, LLP and its co-counsel Beasley Allen Crow Methvin Portis & Miles, P.C., Goza & Honnold, LLC, and The Maher Law Firm (“Attorneys” or “We”), and encompasses the following provisions:

### **1. CONDITIONS**

This Agreement will not take effect, and Attorneys will have no obligation to provide legal services, until Client returns a signed copy of this Agreement.

### **2. SCOPE**

Client hires Attorneys to provide legal services in connection with pursuing claims for damages associated with social media litigation, including against Facebook, Meta, Instagram, Snapchat, TikTok, YouTube, and Google, as well as other defendants Attorneys determine appropriate and in the best interests of Client (“Action”).

### **3. DUTIES AND RESPONSIBILITIES OF PARTIES**

- a. All professional work performed under this Agreement shall be performed by Attorneys in accordance with existing professional standards. Attorneys shall exert their best efforts and use their best judgment in review and analysis and preparation of opinions and memoranda and representation in such proceedings. Client will cooperate with Attorneys and their representatives at all times and comply with all reasonable requests of Attorneys in the prosecution of this matter on a timely basis. Client agrees to be truthful at all times with Attorneys, to provide whatever information is necessary (in the Attorneys’ estimation) in a timely and competent manner, and to provide immediate information as to any change in Client’s status which may have any impact on the prosecution of the Action.
- b. Attorneys shall provide periodic updates to Board’s General Counsel regarding the status of the litigation and respond to any inquiries from Board’s General Counsel, or her designee, within five (5) days from the date of such inquiry.
- c. Attorneys shall consult with Board’s General Counsel on all matter’s material to the litigation, including, but not limited to, venue of the litigation, consolidation of Board’s claim with other claims or seeking certification of the Board’s claims as a class action. In the event a consolidation of claims or class action certification of claims that includes those of the Board is granted, Attorneys and the Board shall discuss whether any provisions of this Agreement should be amended. In the event that Board and/or its claim is utilized in a consolidated or class-action case as a bellwether plaintiff and/or claim, Attorneys shall use their best efforts to secure for Board a bellwether settlement rate and/or service payment, subject to any directives of the Plaintiffs’ Steering Committee, the Court, local rules, rules of professional responsibility, or applicable laws.

### **4. LEGAL SERVICES SPECIFICALLY EXCLUDED**

Unless otherwise agreed in writing by Client and Attorneys, Attorneys will *not* provide legal services with respect to (a) defending any legal proceeding or claim against the Client commenced by any person unless such proceeding or claim is filed against the Client in the Action or (b) proceedings before any federal or state administrative or governmental agency, department, or board. With Client’s permission, however, Attorneys may elect to appear at such administrative proceedings to protect Client’s rights. If Client wishes to retain Attorneys to provide any legal services not provided under this Agreement for additional compensation, a separate written agreement between Attorneys and Client will be required.

## 5. FEES

- a. Client will pay Attorneys' fees ("Attorneys' Fees") of:
- i. For any monetary settlement or recovery, or any non-monetary recovery, that Attorneys obtain for Client, Attorneys shall be entitled to thirty-three percent (33%), including thirty-three percent (33%) of the value of any non-monetary settlement or recovery, as approved by the Court or, if not, as agreed to by the parties or, if the parties are unable to agree, as determined by a neutral third party designated by the parties, provided that such fee will be paid only by money recovered from defendants. However, if money recovered from defendants is less than thirty-three percent (33%) of the value of any non-monetary settlement or recovery, Client is not responsible for paying Attorneys any money other than what has been recovered from defendants.
  - ii. Client understands and acknowledges that Attorneys are co-counsel in this Action and are entitled to share in the Attorneys' Fees. Client understands that this Agreement will not increase the total amount of attorneys' fees owed to Attorneys by Client. Client understands and acknowledges that the Attorneys' Fees will be shared as follows:

1. Wagstaff & Cartmell, LLP	25%
2. Beasley Allen Crow Methvin Portis & Miles, P.C.	25%
3. Goza & Honnold, LLC	25%
4. The Maher Law Firm	25%
- b. For determining the Attorneys' Fees as outlined in paragraph 5(a), the date of recovery shall be the date that monies are paid or non-monetary value conveyed by defendants as a result of the Action, whether through settlement, judgment, or other means, rather than the date such monies are promised, agreed, or ordered to be paid.
- c. Contingency fee rates have been negotiated. If no recovery is made, no fees will be charged.
- d. The contingent fee is calculated as a percent of any settlement or recovery prior to the deduction of any expense or cost, i.e., the "Gross Recovery," unless prohibited by law or Court rule.
- e. The Gross Recovery shall include, without limitation, any monetary payments, or the fair market value of any non-monetary property and/or services to be transferred and/or rendered for the benefit of the District, agreed or ordered to be made by the adverse parties or their insurance carriers as a result of the Action, whether by settlement, arbitration award, court judgment (after all appeals exhausted), or otherwise
- f. If, by judgment, there is *no* monetary recovery and Board receives only nonmonetary or "in kind" relief, Attorneys acknowledge that Board is not obligated to pay Attorneys' Fees from public funds for the value of the in kind relief. In the event of in kind relief by judgment, Attorneys' sole source of recovery of contingent fees will come from a common fund or court ordered attorneys' fees.
- g. Client understands that Attorneys have and will invest resources into prosecuting this action on behalf of the Client and Client agrees to make a good faith effort to include attorneys' fees for Attorneys as part of the terms of any settlement or resolution of the Action.
- h. In the event that any of Board's employees serve in the capacity of a testifying expert witness as described in Federal Rule of Civil Procedure 26(a)(2) or parallel state court rule in this case

("Employee Expert Witness"), the Employee Expert Witness' time shall be valued at the same value of a similar non-employee expert witness and the value of the Employee Expert Witness' time shall be used as an offset credit against litigation expenses that would otherwise be deducted from Client's gross settlement amount.

## **6. FEDERAL MDL AND STATE COORDINATION FEE ASSESSMENTS**

- a. In the event there is a Court ordered assessment or agreement for fees and costs required to be paid to any current or future Federal Multidistrict Litigation ("MDL") or any State Court coordinated proceedings, which typically ranges from 6% to 10% of the gross proceeds, the portion of any such assessment designated as attorneys' fees will be paid by Attorneys. However, the portion of any such assessment designated as expenses will be paid from Client's share of any recovery proceeds as part of the costs and expenses advanced, unless otherwise ordered by the Court or prohibited by law or Court rules. At this time, Attorneys cannot determine what Court ordered assessment, if any, will be paid to an MDL or to a State Court coordinated proceeding.
- b. Board understands that additional Attorneys' Fees and/or litigation expense reimbursement(s) may be received by Attorneys from common benefit fund(s) or plaintiff's steering committee discretionary funds from an MDL or State Court coordinated proceeding, Attorneys' representation of other claimants in this litigation, or from other sources. Board agrees and understands that the Attorneys' Fees set forth above in Section 5 shall be recoverable to Attorneys in addition to and notwithstanding such other fees, and that Attorneys' Fees are calculated prior to the assessment of any Court ordered assessment, i.e., from the Gross Recovery.

## **7. SETTLEMENT**

- a. Client has the authority to accept or reject any final settlement amount after receiving the advice of Attorneys. Attorneys shall keep Client's General Counsel reasonably apprised of all settlement discussions and proposals and consider all feedback provided by Client's General Counsel. Attorneys shall, if reasonably possible and not otherwise ordered by the Court, provide Client's General Counsel with a minimum of thirty (30) days prior written notice of a proposed settlement and all reasonably required details in order for Client's General Counsel to consult with Client and provide Client with an opportunity to consider the proposed settlement.
- b. Board understands settlements are a "compromise" of its claims, and that Attorneys' Fees, as outlined in Section 5 above, apply to settlements. For example, if a settlement is reached, and includes future or structured payments, Attorneys' Fees shall be paid from each of those future or structured payments.

## **8. ASSOCIATE COUNSEL**

- a. Board agrees that Attorneys may, in their discretion, employ associate counsel to assist in prosecuting Board's claim, and Board agrees to the participation of any lawyers that Attorneys may choose to involve in Board's case. With the exceptions set forth below, payment of Attorneys' Fees to any such additional counsel will be the responsibility of Attorneys and will not increase the total Attorneys' Fees to be paid by Board. Appropriate costs and expenses incurred by any such additional counsel on Board's behalf, however, will be chargeable to Board on the same terms (set out in this Agreement) as costs and expenses incurred on Board's behalf by Attorneys.
- b. In some instances, it may be necessary for Attorneys to retain special outside counsel to assist on matters other than prosecuting Board's claim for damages. Examples of such instances include the following: a defendant may seek bankruptcy protection and Board seeks bankruptcy counsel that affects Board's claim; or a complex, group settlement may require an ethics opinion from outside counsel; or special action in probate court may be necessary. Board understands that Attorneys do not specialize in these areas of the law and agrees that Attorneys may retain such special outside

counsel to represent Board when Attorneys deem such assistance to be reasonably necessary. Board understands that the fees for such counsel will be deducted from Board's share of the recovery.

#### **9. REASONABLE FEE IF CONTINGENT FEE IS UNENFORCEABLE OR IF ATTORNEY IS DISCHARGED BEFORE ANY RECOVERY**

In the event that the contingent fee portion of this agreement is determined to be unenforceable for any reason or the Attorneys are prevented from representing Client on a contingent fee basis, Client agrees to pay a reasonable fee for the services rendered. If the parties are unable to agree on a reasonable fee for the services rendered, Attorneys and Client agree that the fee will be determined by arbitration proceedings before a mutually agreed upon neutral affiliate with the Judicial Arbitration and Mediation Services (JAMS); in any event, Attorneys and Client agree that the fee determined by arbitration shall not exceed thirty-three percent (33%) of the Gross Recovery as defined herein.

#### **10. NO GENERAL FUND PAYMENTS**

Notwithstanding any other provision in this Agreement, in no event will the Client be required to pay legal fees out of any fund other than the monies recovered from defendants in this litigation. Under no circumstances shall Client's own funds be obligated to satisfy the Attorneys' Fees as a result of the Action or this Agreement.

#### **11. COSTS AND EXPENSES**

In addition to paying Attorneys' Fees, Client shall reimburse Attorneys for all "costs/expenses," which include but is not limited to the following: process servers' fees, fees fixed by law or assessed by courts or other agencies, court reporters' fees, messenger and other delivery fees, parking, investigation expenses, consultants' fees, expert witness fees, travel expenses, and other similar items incurred by Attorneys. The costs/expenses incurred that Attorneys advance will be owed in addition to Attorneys' Fees and Client will reimburse those costs/expenses after Attorneys' Fees have been deducted, unless prohibited by law or Court rule. If there is no recovery, Client will not be required to reimburse Attorneys for costs/expenses. In the event a recovery is less than incurred costs/expenses, Client will not be required to reimburse Attorneys for any costs/expenses above and beyond the recovery.

#### **12. SHARED EXPENSES**

Client understands that Attorneys may incur certain expenses that jointly benefit multiple clients, including, for example, expenses for travel, experts, and copying. Client agrees that Attorneys shall divide such expenses equally, or pro rata, among such clients, and deduct Client's portion of those expenses from Client's share of any recovery.

#### **13. DISBURSEMENT OF PROCEEDS TO CLIENT**

- a. The proceeds of any settlement, judgment, or recovery on Board's behalf under the terms of this Agreement shall be disbursed to Board as soon as reasonably practicable after receipt by Attorneys. At the time of disbursement of any proceeds recovered on Board's behalf under the terms of this Agreement, Board will be provided with a detailed disbursement sheet reflecting the method by which Attorneys' Fees have been calculated and the expenses of litigation which are due to Attorneys from such proceeds. Attorneys are authorized to retain out of any monies that may come into their hands by reason of its representation of Board the fees, costs, expenses, and disbursements to which they are entitled as determined in this Agreement.

- b. It is possible that payment to the Client by the adverse parties to the Action or their insurance carrier(s) or any third-party may be deferred, as in the case of an annuity, a structured settlement, or periodic payments. The Attorneys' Fees will be calculated and paid out of each payment received.

#### **14. LIEN**

In the event any third-party attempts to lien any proceeds recovered in this Action, Client hereby grants, and agrees, to the extent permitted by law or Court rule, that Attorneys hold a first priority and superior lien on any and all proceeds recovered from defendants in the Action in the amount of the Attorneys' Fees and costs that the Attorneys are entitled to under this Agreement. This lien right is limited to only those monies recovered from defendants and in no way affects any other rights of Client in any way whatsoever.

#### **15. DURATION**

This Agreement shall cover the period from date of execution until the termination of the Action or termination of the legal services rendered hereunder, whichever is sooner. This Agreement may be terminated by Board upon at least 10-days' notice, and in the event of such termination, neither party shall have any further rights against the other, except that in the event of a recovery by Board against the defendant(s) subsequent to termination, Attorneys shall have rights in the nature of *quantum meruit* to recover fees, costs and expenses reasonably allocable to its work prior to termination. In the event of termination of this Agreement for any reason, Attorneys shall immediately return to Board all materials and documents of every kind and nature, including but not limited to Board documents and computer disks, relating to this Agreement and the Action. Attorneys may withdraw as Board's attorneys at any time if they determine, in their sole discretion, that Board's claims lack merit or that it is not worthwhile to pursue Board's claims further. In the event that Attorneys exercise their right to withdraw from representation of Board and Board subsequently receives a recovery from the defendants, Attorneys shall have no right to recover fees, costs and expenses expended by Attorneys prior to withdrawal.

#### **16. DISCLAIMER OF GUARANTEE**

Nothing in this Agreement and nothing in Attorneys' statements to Client will be construed as a promise or guarantee about the outcome of Client's matter. Attorneys make no such promises or guarantees. Attorneys' comments about the outcome of Client's matter are expressions of opinion only.

#### **17. MULTIPLE REPRESENTATIONS**

Board understands that Attorneys do or may represent many other individuals/entities with actual or potential claims in the Action. Attorneys' representation of multiple claimants at the same time may create certain actual or potential conflicts of interest in that the interests and objectives of each client individually on certain issues are, or may become, inconsistent with the interests and objectives of the other. As attorneys, Attorneys are governed by specific rules and regulations relating to Attorneys' professional responsibility in Attorneys' representation of clients, and especially where conflicts of interest may arise from Attorneys' representation of multiple clients against the same or similar defendants, Attorneys are required to advise Attorneys' clients of any actual or potential conflicts of interest and obtain their informed written consent to Attorneys' representation when actual, present, or potential conflicts of interest exist. By signing this Agreement, the Board is acknowledging that they have been advised of the potential conflicts of interest which may be or are associated with Attorneys' representation of Board and other multiple claimants and that Board nevertheless wants Attorneys to represent Board, and that Board consents to Attorneys' representation of others in connection with the Action. Attorneys strongly advise Board, however, that Board remains completely free to seek other legal advice at any time even after Board signs this Agreement.

## **18. AGGREGATE SETTLEMENT**

Often times in cases where Attorneys represent multiple clients in similar litigation, the opposing parties or defendants attempt to settle or otherwise resolve Attorneys' cases in a group or groups, by making a single settlement offer to settle a number of cases simultaneously. There exists a potential conflict of interest whenever attorneys represent multiple clients in a settlement of this type because it necessitates choices concerning the allocation of limited settlement amounts among the multiple clients. However, if all clients consent, a group settlement can be accomplished and a single offer can be fairly distributed among the clients by assigning settlement amounts based upon the strengths and weaknesses of each case, the relative nature, severity and extent of injuries, and individual case evaluations. In the event of a group or aggregate settlement proposal, Attorneys may implement a settlement program, overseen by a referee or special master, who may be appointed by a court, designed to ensure consistency and fairness for all claimants, and which will assign various settlement values and amounts to each client's case depending upon the facts and circumstances of each individual case. Board authorizes Attorneys to enter into and engage in group settlement discussions and agreements which may include Board's individual claims. Although Board authorizes Attorneys to engage in such group settlement discussions and agreements, Board will still retain the right to approve, and Attorneys are required to obtain Board's approval of, any settlement of Board's case.

## **19. INDEPENDENT CONTRACTOR**

It is expressly agreed that Attorney's status hereunder is that of an independent contractor and the Attorney shall not be considered an employee of Board for any purpose.

## **20. GOVERNING LAW**

This Agreement shall be governed by and construed in accordance with the laws of the State of Florida, without regard to conflicts of law rules. Venue shall be designated in the State of Florida, Circuit Court for Palm Beach County, Florida, or in the United States District Court for the Southern District of Florida in West Palm Beach.

## **21. ENTIRE AGREEMENT**

It is expressly agreed that this Agreement represents the entire agreement of the parties, that all previous understandings are merged in this Agreement, and that no modification of this Agreement shall be valid unless written and executed by both parties.

## **22. SEVERANCE CLAUSE**

It is expressly agreed that if any term or provision of this Agreement, or the application thereof to any person or circumstance, shall be held invalid or unenforceable to any extent, the remainder of this Agreement, or the application of such term or provision to persons or circumstances other than those to which it is held invalid or unenforceable, shall not be affected thereby; and every other term and provision of this Agreement shall be valid and shall be enforced to the fullest extent permitted by law.

## **23. ACKNOWLEDGEMENTS AND AUTHORITY TO EXECUTE**

The parties acknowledge that they have carefully read and fully understand all of the provisions of this Agreement, and that they have the capacity to enter into this Agreement. Each party and the person signing on behalf of each party represents that the person signing this Agreement has the authority to execute this document and thereby bind the party hereto on whose behalf the person is signing. Specifically, the Board acknowledges that it is bound by this Agreement and will execute all the necessary documents (i.e., passing an ordinance or resolution) that may be required by its governing statutes and/or code.

## **24. COMPLIANCE WITH LAWS & STUDENT INFORMATION**

Attorneys shall comply with all applicable federal and state laws, codes, rules and regulations in performing their duties, responsibilities and obligations pursuant to this Agreement. In the event that Attorneys require any confidential student information to effectively advance Board's claims, Attorneys shall, in addition to all other confidentiality obligations, comply with all applicable requirements of the Family Educational Rights and Privacy Act and Board policies, as reflected on the Agreement Addendum Concerning Student Information (PBSD Form 2220) in Exhibit B attached hereto, unless ordered otherwise by a court of competent jurisdiction.

## **25. INSPECTOR GENERAL**

Attorneys agree and understands that the Board's Office of Inspector General ("Inspector General") shall have access to all papers, books, records, documents, information, personnel, processes (including meetings), data, emails, and instant messages generated with regard to Attorneys' performance of their obligations under this Agreement. Attorneys' employees, vendors, officers and agents shall furnish the Inspector General with requested information and records within their custody for the purposes of conducting an investigation or audit, as well as provide reasonable assistance to the Inspector General in obtaining records and documents as needed for investigation or audit relating to this Agreement, unless such disclosure is otherwise prohibited by Court order. Furthermore, Attorney understands, acknowledges and agrees to abide by School Board Policy 1.092.

## **26. RECORDS**

Each party shall maintain its own respective records and documents associated with this Agreement in accordance with the records retention requirements applicable to public records. Each party shall be responsible for compliance with any public documents request served upon it pursuant to Section 119.07, Florida Statutes, and any resultant award of attorney's fees for non-compliance with that law. Attorneys shall provide prompt notice to Board's General Counsel in the event that Attorneys receive a public records request associated with this Agreement or the services Attorneys are providing to Board hereunder.

## **27. RELIANCE ON COUNSULTANT'S EXPERTISE**

Attorneys warrant and represent to Board that they possess the specialized knowledge, training, qualifications, and experience necessary to perform the services set forth in this Agreement and acknowledges that the Board and Board's General Counsel will rely on Attorneys' advice, recommendations and opinions concerning the services provided under this Agreement, including but not limited to, their compliance with applicable law. Where the services under this Agreement require Attorneys to make recommendations that are controversial or likely to create significant community dissent, Attorneys agree to timely notify and confer with the Board's General Counsel before they make such recommendations publicly.

## **28. PROFESSIONAL LIABILITY INSURANCE**

Attorney shall procure and maintain Professional Liability Insurance for the life of this Agreement, plus two years after completion. This insurance shall provide coverage against such liability resulting from this Agreement. The minimum limits of coverage shall be \$3,000,000.00 with a deductible not to exceed \$10,000.00. In the event of a claim, the deductible shall be the responsibility of Attorneys.

## **29. MEDIA STATEMENTS**

Attorneys shall promptly notify Board's General Counsel of any requests for a media statement regarding Board's case and Attorneys and Board's General Counsel shall coordinate any response prior to the response being provided to the media.

## **30. E-VERIFY**

Attorney agrees to comply with the all provisions of Fla. Stat. §448.095, including but not limited to registering with and using the U.S. Department of Homeland Security's E-Verify system, <https://e-verify.uscis.gov/emp>, to verify the work authorization status of all newly hired employees during the term of this Agreement.

## **31. COUNTERPARTS**

This Agreement may be executed in one or more counterparts, each of which shall be deemed an original, and all of which, taken together, shall constitute one and the same instrument. Facsimile or PDF versions of this Agreement shall have the same force and effect as signature of the original.

## **32. STATEMENT OF CLIENT'S RIGHTS FOR CONTINGENCY FEES.**

The Client has been provided in Exhibit A, and acknowledges receipt of same, The Florida Bar's Statement of Clients' Rights in Contingency Fee Cases in Florida.

The above is approved and agreed upon by all parties.

[SIGNATURE PAGE FOLLOWS]



**ACKNOWLEDGMENT OF CLIENT**

The undersigned agrees to the terms and provisions of this Attorney-Client Engagement Agreement.

CLIENT:


**THE SCHOOL BOARD OF PALM BEACH COUNTY, FLORIDA**

BY \_\_\_\_\_  
KAREN BRILL  
Board Chair

BY \_\_\_\_\_  
MICHAEL J. BURKE  
Superintendent

Board Approval Date: \_\_\_\_\_

REVIEWED AND APPROVED AS TO LEGAL FORM

  
\_\_\_\_\_  
School Board Attorney

11/29/2023  
\_\_\_\_\_  
Date

**ACKNOWLEDGMENT OF ATTORNEYS**

The undersigned agrees to the terms and provisions of this Attorney-Client Engagement Agreement.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Tom Cartmell, Esq.  
Wagstaff & Cartmell, LLP

Dated: \_\_\_\_\_

\_\_\_\_\_  
Joseph VanZandt, Esq.  
Beasley Allen Crow Methvin Portis  
& Miles, P.C.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Kirk Goza, Esq.  
Goza & Honnold, LLC

Dated: \_\_\_\_\_

\_\_\_\_\_  
Steven Maher, Esq.  
The Maher Law Firm

## **EXHIBIT A**

### **STATEMENT OF CLIENT'S RIGHTS FOR CONTINGENCY FEES**

Before you, the prospective client, arrange a contingent fee agreement with a lawyer, you should understand this statement of your rights as a client. This statement is not a part of the actual contract between you and your lawyer, but, as a prospective client, you should be aware of these rights:

1. There is no legal requirement that a lawyer charge a client a set fee or a percentage of money recovered in a case. You, the client, have the right to talk with your lawyer about the proposed fee and to bargain about the rate or percentage as in any other contract. If you do not reach an agreement with one lawyer you may talk with other lawyers.

2. Any contingent fee contract must be in writing and you have 3 business days to reconsider the contract. You may cancel the contract without any reason if you notify your lawyer in writing within 3 business days of signing the contract. If you withdraw from the contract within the first 3 business days, you do not owe the lawyer a fee although you may be responsible for the lawyer's actual costs during that time. If your lawyer begins to represent you, your lawyer may not withdraw from the case without giving you notice, delivering necessary papers to you, and allowing you time to employ another lawyer. Often, your lawyer must obtain court approval before withdrawing from a case. If you discharge your lawyer without good cause after the 3-day period, you may have to pay a fee for work the lawyer has done.

3. Before hiring a lawyer, you, the client, have the right to know about the lawyer's education, training, and experience. If you ask, the lawyer should tell you specifically about the lawyer's actual experience dealing with cases similar to yours. If you ask, the lawyer should provide information about special training or knowledge and give you this information in writing if you request it.

4. Before signing a contingent fee contract with you, a lawyer must advise you whether the lawyer intends to handle your case alone or whether other lawyers will be helping with the case. If your lawyer intends to refer the case to other lawyers, the lawyer should tell you what kind of fee sharing arrangement will be made with the other lawyers. If lawyers from different law firms will represent you, at least one lawyer from each law firm must sign the contingent fee contract.

5. If your lawyer intends to refer your case to another lawyer or counsel with other lawyers, your lawyer should tell you about that at the beginning. If your lawyer takes the case and later decides to refer it to another lawyer or to associate with other lawyers, you should sign a new contract that includes the new lawyers. You, the client, also have the right to consult with each lawyer working on your case and each lawyer is legally responsible to represent your interests and is legally responsible for the acts of the other lawyers involved in the case.

6. You, the client, have the right to know in advance how you will need to pay the expenses and the legal fees at the end of the case. If you pay a deposit in advance for costs, you may ask reasonable questions about how the money will be or has been spent and how much of it remains unspent. Your lawyer should give a reasonable estimate about future necessary costs. If your lawyer agrees to lend or advance you money to prepare or research the case, you have the right to know

periodically how much money your lawyer has spent on your behalf. You also have the right to decide, after consulting with your lawyer, how much money is to be spent to prepare a case. If you pay the expenses, you have the right to decide how much to spend. Your lawyer should also inform you whether the fee will be based on the gross amount recovered or on the amount recovered minus the costs.

7. You, the client, have the right to be told by your lawyer about possible adverse consequences if you lose the case. Those adverse consequences might include money that you might have to pay to your lawyer for costs and liability you might have for attorney's fees, costs, and expenses to the other side.

8. You, the client, have the right to receive and approve a closing statement at the end of the case before you pay any money. The statement must list all of the financial details of the entire case, including the amount recovered, all expenses, and a precise statement of your lawyer's fee. Until you approve the closing statement your lawyer cannot pay any money to anyone, including you, without an appropriate order of the court. You also have the right to have every lawyer or law firm working on your case sign this closing statement.

9. You, the client, have the right to ask your lawyer at reasonable intervals how the case is progressing and to have these questions answered to the best of your lawyer's ability.

10. You, the client, have the right to make the final decision regarding settlement of a case. Your lawyer must notify you of all offers of settlement before and after the trial. Offers during the trial must be immediately communicated and you should consult with your lawyer regarding whether to accept a settlement. However, you must make the final decision to accept or reject a settlement.

11. If at any time you, the client, believe that your lawyer has charged an excessive or illegal fee, you have the right to report the matter to The Florida Bar, the agency that oversees the practice and behavior of all lawyers in Florida. For information on how to reach The Florida Bar, call 850/561-5600, or contact the local bar association. Any disagreement between you and your lawyer about a fee can be taken to court and you may wish to hire another lawyer to help you resolve this disagreement. Usually fee disputes must be handled in a separate lawsuit, unless your fee contract provides for arbitration. You can request, but may not require, that a provision for arbitration (under Chapter [682](#), Florida Statutes, or under the fee arbitration rule of the Rules Regulating The Florida Bar) be included in your fee contract.

**EXHIBIT B**

**ADDENDUM CONCERNING STUDENT INFORMATION (PBC SB Form 2220)**

THE SCHOOL DISTRICT OF PALM BEACH COUNTY  
**Contract/Agreement Addendum**  
**Concerning Student Information**

ADDENDUM, Concerning Student Information, to the Contract/Agreement ("the Contract") dated, \_\_\_\_\_ between the school (*named below*) or The School Board of Palm Beach County, Florida (*named below*) and Vendor/Partner (*named below*).

School or School Board School Board

Vendor or Partner Wagstaff & Cartmell, LLP, Beasley Allen Crow Methvin Portis & Miles, P.C., Goza & Honnold, LLC, and The Maher Law Firm

Pursuant to School Board Policy 5.50, receipt of which is acknowledged by the Vendor's/Partner's signature below, the School Board of Palm Beach County, Florida (the "School Board") hereby designates [vendor/partner] ("the Receiving Party") as an "other school official" for the purpose of receiving limited personally identifiable information from education records of students under the Family Education Rights and Privacy Act (20 U.S.C. s. 1232g) and 34 C.F.R. s. 99.31(a)(1)(i)(B), and sections 1002.22 and 1002.221, Florida Statutes and FL SBE Rule 6A-1.0955 and, where applicable, Rule 6A-1.09550, because the School Board recognizes the Receiving Party has a legitimate educational interest in receiving this information in order to fulfill the Receiving Party's responsibilities for the school or School Board under the Contract. (All other terms of the Contract remain the same.)

As a condition precedent to receiving personally identifiable information from education records of students, the Receiving Party warrants and agrees that the Receiving Party:

1. will limit the use of, or access to, personally identifiable information from education records of students to the limited scope of information actually needed to complete the Receiving Party's duties and/or services under the Contract. The School Board has determined that the Receiving Party has a legitimate educational interest in receiving only the following fields of student data, for example: name, grade-level, school attending, etc. (indicate fields of data requesting below); and

school name, grade level, services from school staff and behavioral and mental health providers, incident reports, attendance records, discipline records, and state testing results (all deidentified).

2. will limit the access to personally identifiable information from education records of students to its employees and/or agents who actually have a legitimate educational interest in the information (i.e., they legitimately need to access the information in order to fulfill the Receiving Party's responsibilities under the Contract); and
3. shall avoid, and shall instruct applicable employees/agents to avoid, accessing personally identifiable information from education records of students, except for the legitimate purposes recognized under this Addendum, and shall require that all employees/agents accessing the data must be trained in, and sign an acknowledgement regarding, the confidentiality requirements; and
4. is under the direct control of the School Board with respect to the use and maintenance of education records; and
5. is subject to the requirements of 34 C.F.R. s. 99.33(a) governing the use and redisclosure of personally identifiable information from an education record of a student, meaning the Receiving Party may disclose personally identifiable information from an education record only on the condition that the party to whom the information is disclosed will not disclose the information to any other party without the prior consent of the parent or eligible student as those terms are defined in 34 C.F.R. s. 99.3, and the officers, employees, and agents of a party that receives information from the Receiving Party may use the information, subject to the limitations described in paragraph 2 above, but only for the purposes for which the disclosure was made; and
6. shall comply with the requirements of the Family Educational Rights and Privacy Act (FERPA), its implementing regulations, Section 1002.22, Florida Statutes, the Protection of Pupil Rights Amendment (PPRA), the Student Online Personal Information Protection Act, Section 1006.1494, Florida Statutes, and the Children's Online Privacy Protection Act (COPPA), 15 USC ss 6501-6506, and its implementing regulations, and shall not use any of the personally identifiable information from education records of students that is received pursuant to this Addendum in violation of any applicable federal or state law, rule, regulation, or School Board policy. The personally identifiable information must not be used for any other purpose other than the purposes outlined in the Contract/Agreement. Data mining or scanning of user content for the purpose of advertising or marketing to students or their parents is prohibited. The Receiving Party must not share or sell a student's personally identifiable student information for commercial purposes without providing parents a means to consent or disapprove; and
7. will store and process personally identifiable information from education records of students in accordance with industry best practices. This includes appropriate administrative, physical, and technical safeguards to secure personally identifiable information from unauthorized access, disclosure, and use. Receiving Party will conduct periodic risk assessments and remediate any identified security vulnerabilities in a timely manner. Receiving Party will also have a written incident response plan, to include prompt notification of the School Board in the event of a security or privacy incident, as well as best practices for responding to a breach of personally identifiable information. Receiving Party agrees to share its incident response plan with the School Board upon request. The Receiving Party must maintain and revise its incident response plan to ensure that it is in a ready state at all times; and
8. will dispose of all information disclosed to it by the school or the School Board (and any copies thereof), after the purpose for which the information is disclosed has been served, or five years after the receipt of the information (whichever is sooner), by shredding paper documents finely enough to prevent possible recovery of information, and by totally erasing and over-writing (or physically destroying) any electronic media such as computer files, tapes, or diskettes, unless the information in the possession of the Receiving Party constitutes a "record copy" required to be retained by the School District's Records Retention Schedule (available online at the District's Records Management website, <http://www.palmbeachschools.org/records>), in which case the Receiving Party will return the information to the School Board rather than disposing of it.

The parties acknowledge that the terms contained in this Addendum supersede any inconsistent terms in the Contract.

IN WITNESS WHEREOF, the parties hereto have executed this Addendum:

Legal Name of the Receiving Party  
*(Vendor/Partner)*  
 Wagstaff & Cartmell, LLP, Beasley Allen Crow Methvin Portis & Miles, P.C.,  
 Goza & Honnold, LLC, and The Maher Law Firm

Vendor or Partner

\_\_\_\_\_  
*Signature of person having authority to enter*      *Date*  
*legally binding agreements on behalf of Receiving Party.*

The School  
 \_\_\_\_\_  
 For the School Board of Palm Beach County, Florida

\_\_\_\_\_  
*Signature of person having authority to enter legally*      *Date*  
*binding agreements on behalf of the School or The School*  
*Board of Palm Beach County, Florida.*