

SUMMARY OF CHARGEABLE ACTIVITIES “PERMISSIBLE” EXPENDITURES FOR MANDATORY BARS PURSUANT TO *KELLER* AND ITS PROGENY

Chargeable or Permissible Activities

- (1) Activities connected with disciplining members of the bar (*Keller, Schneider, Frankel*).
- (2) Acting as professional advisors to those charged with regulating the legal profession (*Keller*).
- (3) Proposing ethical codes or regulations for lawyers (*Keller, Schneider, Frankel*).
- (4) Ensuring Attorney competence (*Schneider, Frankel*).
- (5) The education, ethics, competence, integrity and regulation as a body of the legal profession (*Frankel*).
- (6) Increasing the availability of legal services (*Schneider, Frankel*).
- (7) Improving court operations, efficiency and efficacy (*Schneider, Frankel*).
- (8) Expenditures without expressive content that benefit all members equally, such as offering free life insurance (*Schneider*).
- (9) Social events for the members (*Schneider, Romero*).
- (10) A Periodical for members which is “devoted to educational articles about the legal profession or the quality of legal services available,” and which does not publish “markedly political and ideological material” (*Schneider*).
- (11) Political activities, including lobbying, may be funded as long as the target issues are narrowly limited to issues of regulation of the legal profession and improving the quality of legal services, such as court budgets, salaries for government attorneys, attorney advertising and legal specialization (*Schneider*).
- (12) Regulation of attorneys’ client trust accounts (*Frankel*).
- (13) Issues (a) of great public interest; (b) that lawyers are especially suited for by their training to evaluate and explain; and (c) where the subject matter affects the rights of those likely to come in connect with the judicial system (*Frankel*).
- (14) Lobbying to allow either a seal or a stamp on notarized documents (*Schneider*)

Non-chargeable or Impermissible Activities

- (1) Endorsement or advancement of gun control initiatives (*Keller*).
- (2) Endorsement or advancement of nuclear weapons freeze initiatives (*Keller*).
- (3) Lobbying for various children’s rights (*Frankel*).
- (4) Lobbying for welfare and benefits legislation (*Frankel*).
- (5) Mandating that all members purchase life insurance. Still in question (*Romero*).
- (6) Mandatory fees that are used for both activities that are germane to core purposes that are mixed with other activities that would be prohibited generally result in being prohibited or chargeable (*Carole, Smith, Colegio, Schneider v Colegio*).
- (7) Issues of family planning, abortion, no fault insurance, and the death penalty (*Schneider*)

- (8) In *Schneider*, the legal status (statehood) of Puerto Rico. (*Schneider*)
- (9) Committees on nuclear armament and the nuclear ban treaty in Latin America were both found to be outside the narrow category for which financial support could be compelled. (*Schneider*)