IN-HOUSE PRO BONO IN PRACTICE PROFILE: JPMORGAN CHASE & CO.
September 2014

While JPMorgan Chase & Co. (JPMC) and its various predecessor institutions have had thriving local pro bono programs for years, the JPMC Legal Department undertook to establish a formal department-wide pro bono program about five years ago. JPMC's program is dedicated to the memory of its late general counsel, Joan Guggenheimer, who was a strong proponent of pro bono. JPMC's current General Counsel, Stephen Cutler, also openly and enthusiastically supports the department's pro bono efforts and participates in projects organized by the department.

The JPMC Legal Department considers its pro bono program a tremendous asset with incalculable value to the department and to JPMC. Pro Bono Committee Chair Michael Lipsitz said that JPMC's pro bono program "allows each of us – who recognize how fortunate we are – to give back personally and professionally." After partnering with a number of law firms and legal services organizations over the years, JPMC is focusing on developing its own pro bono initiatives, ultimately inviting other law firm and in-house volunteers to participate. The JPMC Legal Department also is more closely aligning its pro bono program with JPMC's larger firm-wide philanthropic initiatives, focusing global efforts toward supporting communities, empowering families, and advocating for vulnerable individuals, with a special emphasis on helping kids in need.

General Program Information	
Offices with Legal Staff	HQ: New York, NY; more than 15 other offices in the U.S.; more than 20 offices outside the U.S.
Size of Legal Depart.	1,100 Attorneys; 700 Non-Attorney Staff
Pro Bono Leadership Structure	The JPMC pro bono program is led by a steering committee comprised of 20 lawyers and non-lawyers from different geographic regions and practice areas. The committee, which is chaired by a senior lawyer, oversees the general department-wide program, approves signature projects, and champions pro bono initiatives. In addition, various practice groups and regions have their own pro bono efforts, which the committee monitors generally and supports, but does not manage directly. Finally, there is a designated leader for each signature project.
Pro Bono Policy	JPMC's policy, which was implemented about five years ago and recently updated, addresses pro bono goals, scope, administration, oversight, and allocation of resources. The mission of the pro bono program is: "to lead and support the JPMorgan Chase & Co. Legal Department's commitment to pro bono services by facilitating broad participation and deep engagement by the Department's global staff in legal pro bono and other community services volunteer activities

	focused on strengthening communities, empowering families and advocating for vulnerable individuals."
Mandatory Pro Bono	Pro bono service is not mandated but is expressly encouraged in several ways, including promotions in emails, the department website, a pro bono newsletter, discussions and announcements at meetings, as well as personal recruitment by leadership and members of the pro bono committee. In addition, JPMC is piloting a lunch and learn series, and will begin hosting periodic evening receptions, to showcase opportunities and facilitate greater awareness of the program. The department has not set a recommended number of pro bono service hours or target participation rate for its employees.
Recognitions/Awards	The JPMC legal department recognizes staff locally and department-wide for their pro bono work, including in a quarterly newsletter.
Tracking Pro Bono	JPMC does not track pro bono service.
Partnerships	JPMC coordinates and works with a number of legal services organizations and law firms on various pro bono initiatives, which vary by geography, some of which are noted below.
Non-Lawyer Involvement	Both lawyers and non-lawyers are encouraged to participate in pro bono and are recognized for their efforts. Non-lawyers can serve on the pro bono committee.
Key Pro Bono Projects	
Veterans	• **Veterans Assistance Program**. In partnership with the New York City Bar Association, volunteers from JPMC's New York area offices, including its corporate headquarters, periodically staff a clinic to assist veterans applying for veterans benefits. The volunteers meet with clients and conduct intake at the clinic and generally provide ongoing representation until the U.S. Veterans Administration (VA) makes a benefit determination. Approximately 15-20 volunteers participate, generally in pairs, and about 10 clients are served at any given clinic. (New York) • **John Marshall Law School Veterans Legal Support Center & Clinic.** JPMC volunteers accept cases from the law school's veterans clinic throughout the year. The cases involve all aspects of representing veterans before the VA. The law school trains the volunteers and a clinic law student or staff attorney conducts initial intake and prepares initial research and a case memo for the volunteer attorney, who then handles the matter through completion. JPMC non-attorney staff members can pair with a JPMC attorney to also participate in the program. (Chicago) • **Widener Law School Veterans Law Clinic**. JMPC volunteers periodically take cases from the law school's veterans clinic. The cases involve all aspects of representing veterans before the VA.

	Veterans can come to the clinic for assistance at any phase of the process – from new case filings through appeals. The clinic requires that attorneys represent veterans so JPMC pairs non-lawyers with a JPMC lawyer. Widener provides training and assistance to the volunteers and appoints a law student to each case, who the JPMC attorney helps to oversee and mentor. Volunteers meet with the veteran clients as needed and compile records, conduct research draft papers, attend hearings, and work with medical staff as necessary. (Wilmington, DE) • **Houston Veterans Legal Initiative**. JPMC volunteers participate in various clinics scheduled periodically by the Houston Volunteer Lawyers and the Houston Bar Association. At a clinic, the JPMC volunteers typically provide legal advice to military veterans regarding family law, wills and estates, landlord/tenant, and debtor's issues, as well as veterans benefits. (Houston)
Education	• **Every Child in School, Every Day**. JPMC partnered with the Chicago Coalition for the Homeless (CCH) to develop the Every Child in School, Every Day program dedicated to educating families and advocating for the educational rights of homeless families and youth. JPMC and CCH volunteers provide direct legal services to homeless children who have been denied access to school and services. JPMC also hosts educational events, such as a seminar regarding fee waiver and general education rights for low-income and homeless children. In addition, JPMC volunteers have drafted materials about educational rights and employees from departments throughout the company have gone door-to-door to hand-out such materials. In 2013, JPMC attorneys staffed 20 legal clinics at 10 different Chicago public schools, assisting nearly 50 students. JPMC plans to expand the program to include hosting more legal clinics at youth centers and high schools, as well as developing referral information for various legal needs. JPMC also hosts an annual holiday luncheon for more than 40 homeless or low-income students. (Chicago)
Clinics for Underserved Populations	• **DREAM Act Clinic**. Volunteers from JPMC's Chicago office participate in two to four clinics hosted by the National Immigrant Justice Center each year, in which volunteers assist undocumented immigrant youth applying to defer deportation and obtain work permits. JPMC attorneys and paralegals interview applicants, help complete applications, and compile supporting documentation. Partner firms include Faegre Baker Daniels, Sidley Austin, and Kirkland & Ellis. (Chicago) • **Houston Volunteer Lawyers Program**. Volunteers from JPMC's Houston office participate in this program through the Houston Bar Association to help low-income individuals whom

	other programs often cannot serve, such as non-U.S. citizens and those who may not meet the financial criteria of other legal assistance programs. The volunteers attend Saturday Legal Advice Clinics at various community centers throughout Houston and handle matters involving family law, bankruptcy, elder issues, domestic violence issues, and healthcare issues, among others. (Houston) • **Wills for Heroes**. Attorneys in JPMC's Chicago office periodically participate in Wills for Heroes clinics, often held on Saturdays at police headquarters several times throughout the year. During these clinics, volunteer attorneys draft basic wills and powers of attorney for Chicago police officers and their spouses. JPMC has partnered with Mayer Brown on these events. (Chicago)
Lessons Learned	
Doing pro bono adds value to both the legal department and overall company.	Pro bono service fosters individual professional development and supports and enables participants' achievement of their personal and professional pro bono goals. It also supports the company's larger mission around community and public service in a manner unique to legal professionals.
Use a variety of means to promote pro bono opportunities.	To ensure department members find as many opportunities of interest to them, share opportunities through as many channels as possible, such as emails, the department website, a pro bono newsletter, discussions and announcements at meetings, and personal recruitment by leadership and members of the pro bono committee.
Management support and involvement is key.	Having a general counsel or other manager volunteer alongside other members of the legal department makes a compelling case for participation.
Allow for some autonomy in a large legal department's pro bono efforts.	A "one size fits all" approach can be challenging when coordinating the pro bono efforts of a larger legal department. Being open to a general department-wide program that offers signature pro bono projects, while different practice groups and geographies engage in and manage their own efforts can be a useful structure.

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