CASELEAD AGENCY · COMMERCIAL CONTRACTING REFERENCE · FOR MANAGING PARTNERS & ETHICS COUNSEL

Master Services Agreement & Insertion Order Term Sheet

Summary of standard commercial terms, direct ACH/wire billing rails, replacement clocks, and state bar ethics allocation (Updated November 2026).

REFERENCE TERM SHEET FOR FIRM REVIEW — Final binding scope, pricing, state structure, and replacement criteria are executed per signed MSA + state-specific Insertion Order.

1. Standard Commercial & Billing-Rail Terms

CONTRACTUAL TERM	CASELEAD STANDARD SPECIFICATION	PARTNER / CFO PROTECTION
Contract Architecture	One Master Services Agreement (MSA) + per-state / per-vertical Insertion Orders (IOs)	Zero 12-month lock-in required; test a 4–10 case pilot before scaling
Published Signed MVA Range	**$2,800–$3,800** per standard signed MVA retainer (where state bar rules permit); OTP leads, transfers, WC & Lemon Law quoted per IO	Published price band confirmed in writing before media spend begins
Payment Rail & Tranches	Direct CaseLead-branded **ACH or wire transfer** on all $10,000+ orders; optional **50/50 starter split** on 4–10 case pilots; staged tranches on 50–100+ unit blocks	Eliminates $30,000 checkout-link caps, 3.4%–3.9% card markups, and third-party statement disputes
Exclusivity & Deduplication	100% exclusive to buying firm per matter; SHA-256 duplicate-suppression matching claimant phone, email, and incident date across active vendors	Safe to multi-source CaseLead beside 1–2 incumbent acquisition suppliers
Replacement / Credit Clock	**48 hours to 7 days** written review window from packet delivery (per format)	Objective triggers: prior counsel, outside county, excluded liability/injury, or bogus contact
CRM & Attribution Sync	Direct JSON webhook, CSV, or email push into Filevine, Lead Docket, Litify, Lawmatics, SmartAdvocate, CASEpeer, or Clio Grow	Isolated `caselead_source` + cohort ID prevents overwritten source reporting

2. 4-Part Handoff Packet Manifest & State Bar Ethics Allocation

4-Part Signed Case Handoff Manifest

- **01. Executed Firm Retainer:** Signed strictly on your firm's own approved representation agreement with e-sign IP/timestamp certificate.
- **02. Structured Intake Summary:** Liability narrative, county, date of loss, injury/medical care, insurance status, and flagged open items.
- **03. 1-to-1 TCPA & Consent Proof:** Firm-identified opt-in language + TrustedForm / Jornaya certificate and SMS OTP log (where applicable).
- **04. Recorded Screening Audio:** Full bilingual or English human qualification recording documenting prior-counsel confirmation.

ABA Rule 7.2 & Op. 506 Responsibility Split

- **Direct Per-Retainer States (e.g., IL, AZ):** Standard per-retainer pricing where connecting-service rules permit.
- **Proposal Signed-Eligible (TX, CA, GA, NV, WA):** Scoped per state ad disclosures and local solicitation statutes.
- **Bar-Restricted States (NY, FL, NJ, PA, CO, MD, CT):** Structured strictly as fixed firm-branded advertising + intake program costs—zero retention-contingent fee.
- **Attorney Oversight (ABA Op. 506):** Buying firm retains 100% authority to review files and decide whether to accept representation.

Ready to Redline or Scope a Bounded Starter Pilot?

Forward this term sheet to your managing partner, CFO, or ethics counsel. Request a customized state-compliant MSA + Insertion Order directly from **James Beele, Founder** at **james@caseleadagency.com** or book a 30-minute scope review at **https://caseleadagency.com/contact**.

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