



**General Practice,
Solo & Small Firm
Division**

National Solo and Small Firm Conference & Young Lawyers Institute Schedule

October 16 - 17, 2009
Millennium Biltmore Hotel
Los Angeles, CA
(as of October 12, 2009)

Partially funded by the ABA Standing Committee
on Continuing Legal Education Underserved Lawyers Fund.

Friday, October 16, 2009

8:00 a.m. - 9:15 a.m.

Pre-Conference Session

Social Media for Lawyers: Six Important Principles for Effective Participation

Social media is an efficient and economical tool that lawyers can use to help their practices grow and thrive. In this program, lawyers will learn about six important principles, applicable across social media platforms, that will help them use social media to promote and market their practices, showcase their areas of expertise, and network with other attorneys.

Lisa Solomon, Ardsley, NY

Nicole Black, Rochester, NY

CLE credit has been requested for pre-conference session

9:30 a.m. - 10:45 a.m.

Pre-Conference Session

How to Magnetically Attract All the Prospects You Can Handle with Education-Based Marketing that Turns You into the Expert in Your Field and Eliminates Any Competition While Still Promoting to Your Own Clients.

As lawyers, most of us are natural teachers. We love to share our knowledge and information with others who don't know as much as we do about our chosen practice area. This is fantastic, BUT how you share this knowledge and what you do after you share the knowledge makes all the difference in the world. It's the difference between people being annoyed at your "know it all" tendencies and being drawn to you because you have become THE trusted resource in your marketplace and completely unshoppable.

Alexis Martin Neely, Los Angeles, CA

Lawrence Silber, Ottawa, Ontario, Canada

CLE credit has been requested for pre-conference session

9:30 a.m. - 11:00 a.m.

Young Lawyers Institute

How to Hang Your Shingle and Start Your Firm.

Almost any lawyer can successfully start a practice if he or she is willing to learn how to do it. 90 minutes with Jay Foonberg and a few hours with his books including the all time best seller of the American Bar Association, *How to Start and Build a Law Practice, 5th edition*, can prevent you from wasting time and money doing it the wrong way. Mr. Foonberg's up to date classic books and programs have helped hundreds of thousands of lawyers achieve success!

Jay Foonberg, Beverly Hills, CA

11:00 a.m. - 12:00 p.m.

Pre-Conference Session

Practicing Law in a Tough Economy – Innovations on Client Relations

Hard economic times don't reduce the need for legal services; they simply reduce the demand for those services. Consequently, lawyers are adopting changes that create win-win situations for themselves and their clients in a difficult economy. This program looks at three ways that lawyers are changing their practices to better connect with clients and meet their legal needs. Topics include

- Innovative methods of outreach, with a focus on the Legal Grind Coffeehouse
- Partnering with clients to create unbundled legal services
- The development of highly-focused niche practices

Jeff Hughes, Santa Monica, CA

Forrest Mosten, Los Angeles, CA

Will Hornsby, Chicago, IL

CLE credit has been requested for pre-conference session

11:10 a.m. - 12:00 p.m.

Young Lawyers Institute

General Practice 101: Avoiding Solo/Small Firm Ethical Traps

The program will focus on basic concepts every lawyer needs to practice defensively, including practical approaches to avoiding and minimizing potential malpractice and conflicts of interest.

David Parker, Los Angeles, CA

William Mills, Los Angeles, CA

12:00 p.m. - 1:00 p.m.

Opening Plenary – Luncheon

Levels of Leadership: The View from the 52nd Floor

Leadership is quite complex. It is far more complex than most of us realize and certainly more complex than what most "How to" leadership books suggest. We will get a taste of a new approach to leadership based on, *The 52nd Floor: Thinking Deeply About Leadership*.

David A. Levy, United States Air Force Academy, USAFA, CO

David A. Levy, United States Air Force Academy, USAFA, CO

1:10 p.m. - 2:00 p.m.

Young Lawyers Institute

General Practice 101: The Family Law and Estate Planning Practice – A New Economy Business Model

If you build your law firm on the traditional law business model, you'll quickly realize what it means to be stuck - constantly chasing the next new client, bringing home very little of the money you are making, rarely (if ever) able to take a vacation, working all the time, scrambling, scrambling, scrambling. This is not why you went to law school. This is not why you are starting a business. You started your business because you wanted to make a real difference in your client's lives, because you wanted the freedom of doing things your way and on your time, and because you wanted a great return on your investment. Well, unless you break free of the broken business model, it's not going to be what you hoped. Attend this special session and discover the new economy business model that will give you everything you've been looking for in your business and your life as a lawyer.

Alexis Martin Neely, Los Angeles, CA

1:30 p.m. - 2:30 p.m.

Service To Others Track

Practicing for the Public Good

Solo and Small Firm Practitioners are ideally suited to serve the needs of underrepresented or disadvantaged people or causes. Whether the primary mission of the firm is to make money or to advance a particular cause, there are a number of ways in which solo and small firm practitioners serve their communities. This workshop will highlight several models, including a standard private firm with a formal commitment to pro bono service; a private public interest law firm whose primary mission is to assist underrepresented people or causes; a non-profit law firm funded by donors and staffed by law firm attorneys and volunteers; and an independent volunteer program. Panelists will discuss how each model benefits the lawyer, the firm, and the community.

Pamela Feinstein, Bellevue, WA

David Lash, Los Angeles, CA

Steve Nissen, Universal City, CA

Anne Richardson, Pasadena, CA

Hernan Vera, Los Angeles, CA

1:30 p.m. - 2:30 p.m.

Technology Track

Tightwad Technology: Better Using What You Already Have - Top Word, WordPerfect, Outlook, and Acrobat Tips!

In these trying times when we've seen our 401Ks tumble precipitously, it's not the ideal time to splurge on new technology. Instead, we'll show you how Technology Tightwads wring more productivity and profits out of the systems you already have. We'll explore law practice-specific tips, tricks and shortcuts for better using Word 2003 and 2007, Outlook, and Adobe Acrobat. See the Acrobat Typewriter in action. Discover how Acrobat is the best tool for digging you out of your overflowing Outlook mailboxes. See Word "Styles" demystified. Learn about Outlook as a Case Manager. Why buy more when you can better use what you already have . . . and better serve your clients at the same time!

Ross Kodner, Milwaukee, WI

1:30 p.m. - 2:30 p.m.

Law Practice Management Track

Issue Spotting in Immigration law for the Non-Immigration Lawyer

This course will be valuable for non-immigration lawyers who don't know where to begin in analyzing and solving immigration cases. This program is also for those deciding whether they wish to add immigration to their practice or not. We will begin with a simple presentation of the whole of immigration law and its major parts, from entry to removal from the U.S. and the progression from nonimmigrant, to immigrant to citizen. Then, illustration of common scenarios would be presented through sample Intake Questionnaires to illustrate various common fact patterns. Sample cases will include: 1. the spouse of a U.S. citizen; 2. the entrepreneurial alien; 3. an employer seeking to hire a U.S. worker; 4. an illegal farm worker; 5. a criminal who has been put into removal proceedings; 6. an alien in the U.S. military. Options for gaining immigration status for these examples will be provided in handout materials.

Alice Yardum-Hunter, Encino, CA

2:10 p.m. - 3:00 p.m.

Young Lawyers Institute

General Practice 101: Litigation and Discovery: Ten Absolute Musts

Litigation and Discovery can be an intimidating minefield for inexperienced young lawyers. Let experienced lawyers guide you through the process with the 10 Musts for setting up a litigator's office, Trial Preparation, Discovery, Depositions, a Smooth Trial and helpful tips from the Bench. Subjects such as the mechanics of deposition set up, notices, stenographers, documents for the witness, preparation outlines, usual stipulations and objections will be discussed.

Steve Mayer, Los Angeles, CA

Stacy Auzenne, Alexandria, LA

2:45 p.m. - 3:45 p.m.

Service To Others Track

Sustaining a Viable Law Practice Serving Low- & Moderate- Income Clientele

As the consumers of legal services demand more affordable legal services, and the cost of a legal education and maintaining a law practice continue to rise, attorneys are forced to reinvent how they provide legal services to stay competitive and ensure the accessibility of legal services. This panel will highlight solo practitioners and small firms who are building sustainable law practices by serving low- and moderate-income clients at modest prices and with alternative fee programs. They will speak candidly about their experiences and offer insights about what partnerships or resources are available for neighborhood-based lawyers during this uncertain financial time.

Luz Herrera, San Diego, CA

Phillip Robinson, Baltimore, MD

Eileen Chun, Los Angeles, CA

Rudy Monterrosa, South Bend, IN

2:45 p.m. - 3:45 p.m.

Technology Track

From Paper to Pixels: Building the Complete (and Green) Paper LESS Electronic Case File

Who isn't buried in piles of paper - at your office, at home, seemingly everywhere? How many otherwise billable hours do you and your staff waste everyday looking for case information you can only find in a paper file? If these thoughts already conjure images too painful to contemplate, you desperately need this session. Award-winning legal technology consultant and National Solo & Small Firm Conference founder, Ross Kodner, will walk you through his Paper LESS Process - a proven, practical, realistic and cost-effective way to whip those piles into shape and show all that paper who's boss. Learn how to go from paper to pixels, building complete electronic client case files . . . saving both your pocketbook and the planet.

Ross Kodner, Milwaukee, WI

2:45 p.m. - 3:45 p.m.

Law Practice Management Track

Preparing for the Worst: Keeping your Head When Negative News Hits

A panel discussion of how to respond when clients come to you with newsworthy problems. Should you "not comment," or try to fix public perception? Who should you reach out to for assistance? Do you respond differently when it's a sudden crisis v. a slow-growing one? How can you help clients spot a crisis before it runs you over? Speakers include crisis management specialists and attorneys who have represented clients in crisis situations.

Andrea Obston, Bloomfield, CT

Barbara Witten, Heathrow, FL

Todd Scott, Minneapolis, MN

3:10 p.m. - 4:00 p.m.

Young Lawyers Institute

General Practice 101: Advising the Small Business

Presented by Jean L. Batman, author of the ABA book Advising the Small Business, this program will provide an overview on representing small businesses and avoiding conflicts, and will highlight some of the important issues to discuss with clients in connection with choice of entity, founders' agreements, and raising money.

Jean Batman, San Francisco, CA

4:00 p.m. - 5:00 p.m.

Service To Others Track

Current Issues in Mortgage Foreclosures

A panel discussion of what's happening today in mortgage foreclosure defense. Topics will include new defenses and how they're working; how banks are approaching pre-suit negotiations, and short sales.

Christopher Brown, Westport, CT

Amy Clark Kleinpeter, Alhambra, California

Kenneth Yudell, New York, NY

4:00 p.m. - 5:00 p.m.

Technology Track

Effective Strategies for Conducting Electronic Discovery

Our presentation will begin by covering the basic Federal Rules of Civil Procedure rules and case law that apply to eDiscovery. Included will be a discussion as to when the duty to preserve arises. Next, we move into working with electronically stored information. Topics to be addressed here are: data map creation, litigation holds, documenting data collection efforts, working with IT and Early Case Assessment checklists. Then, we cover reviewing electronically for responsiveness. In this category we dive into document review strategies and minimizing document review costs. Finally we conclude by examining management of electronically stored information productions. Here we go over production formats as well as how to properly track logging efforts.

Michael Swarz, Los Angeles, CA

Jacques Nack Ngue, Los Angeles, CA

Sheryl Katz, Los Angeles, CA

4:00 p.m. - 5:00 p.m.

Law Practice Management Track

Straight Talk on How to Maximize Cash Flow in Uncertain Times

Through lecture, real-life examples, practical formulas, and interactive audience discussion, participants will learn how to:

- Effectively manage accounts receivable (collections policy, fee agreements, advance fee deposits, aged accounts reports)
- Gain more billable time each day without working harder (contemporaneous timekeeping, time management tips, planning)
- Get your billing rates right (cost of providing legal services, atty compensation, realization rate, the flat fee trap)
- Analyze key information for better financial management (overhead-to-revenues ratio, turnover rate, liquidity and current ratios, budget)
- Adapt the firm's billing practices to even out cash flow (billing cycles that keep revenues up, detailed billing descriptions, three purposes of a client bill)
- Identify personal habits that keep attorneys under earning (procrastination, disorganization, excessive volunteerism, inadvertent pro bono, poor case and client selection skills, vagueness about money, etc.)
- Generate new business from former clients (costs 11 times more to generate business from a new client than from an existing or former client)
- Identify the many opportunities available in an economic downturn (the need for legal services increases in certain practice areas during an economic downturn -- you just need to understand who your new clients might be and what their needs are).

Ann Guinn, Kent, WA

4:10 p.m. - 5:10 p.m.

Young Lawyers Institute

Starting a Low Bono Program in Your Area

In 1995, the ABA reported that as many as 80% of low-income persons were unable to obtain legal assistance and a 1994 ABA report estimated that 61% of moderate-income families were in the same predicament. Given the ever-growing crisis in access to justice in the US, it is time for law schools, bar associations and existing legal aid organizations to re-think the

current method of delivering services and to develop programs that connect legal education and law schools with a need to provide new attorneys with the skills they need to set up practices in underserved communities. Post-graduate incubator projects for lawyers are essential to promoting community development and social justice in underserved communities throughout the world. These lawyer incubator projects, novel initiatives modeled after business incubators in emerging markets, are already producing remarkable results in the US and abroad.

Fred Rooney, Flushing, NY
Massiel Zucco, New York, NY
Pedro Rivera, New York, NY
Diana Lopez, Tustin, CA
John Wittig, Los Angeles, CA

Saturday, October 17, 2009

8:00 a.m. - 9:40 a.m.

Day 2 Plenary – The 6 Systems Every Law Firm Owner Needs for More Freedom, More Money and More Happy Clients.

In this fast paced presentation, Alexis Martin Neely will guide you through her experience of leaving the big law firm life and starting her own firm with limited financial resources, while she was the breadwinner in her family, had a baby at home and another on the way. She'll share the trials, tribulations and rewards of growing her practice from scratch into a million dollar a year law business in just three years and how every solo and small firm & family law practitioner can follow the proven blueprint for success she developed and has now successfully taught to over 150 other lawyers. Attend this presentation and be ready to transform your business and become the lawyer you've always wanted to be.

Alexis Martin Neely, Los Angeles, CA

9:45 a.m. - 10:45 a.m.

Service To Others Track

Serving Those Who Serve Our Country: Military Issues

This program will provide an introductory analysis of various legal issues affecting service members returning home from deployment and mobilization. The topics will include Uniformed Services Employment and Reemployment Rights Act and highlights regarding the Service members Civil Relief Act.

Joseph DeWoskin, Kansas City, MO
Henry DeWoskin, St. Louis, MO

9:45 a.m. - 10:45 a.m.

Technology Track

Getting the Most from Acrobat in Your Practice

This program will acquaint you with key features of Adobe Acrobat® that are especially useful for lawyers. See how Acrobat tools can enhance the information contained in various types of documents to help you and your clients better understand important information. Annotations can do more than help you see the trees within the forest of information contained in complex documents, they can guide you through the underbrush.

David Masters, Montrose, CO

9:45 a.m. - 10:45 a.m.

Law Practice Management Track

Setting Up a Law Office

The program will focus on the process of setting up a law office and consider issues that experienced attorneys and youngsters just out of law school will both have to face. The program will focus on the mechanics of locating and setting up an office, including the process of how to select the appropriate technology. We will also consider the possibility of the virtual law office as an alternative to a bricks and mortar facility. We will also discuss marketing strategies.

Jeffrey Allen, Oakland, CA
J. Anthony Vittal, Oakland, CA
Yvonne Renfrew, Los Angeles, CA
Diana Stepleton, Portland, OR

11:00 a.m. - 12:00 p.m.

Service To Others Track

Bankruptcy for Non-Bankruptcy Lawyers

The program will address the problems of a non-bankruptcy lawyer when faced with a bankruptcy by the opposing party in a law suit or a business transaction. It will also address issues concerning the attorney's advice to his client regarding a bankruptcy and avoiding the problem of becoming a "Debt Relief Agency." This can happen even if the attorney never represents debtors in bankruptcy. We will also address the question of what to do when your client comes to you and says

"I'm in trouble, what can I do." We will survey the area of bankruptcy law, and provide an overview of bankruptcy in general. The program is designed for the general practitioner with no bankruptcy or insolvency experience or those just becoming interested in practicing in the area.

Marc Stern, Seattle, WA

Lesley Hoenig, Mount Pleasant, MI

Larry Feinstein, Seattle, WA

11:00 a.m. - 12:00 p.m.

Technology Track

Legal Technology for the Rest of Us: Running on a Mac

The program will focus on the ability of lawyers to run their office/practice on a Mac instead of a Windows operating system. We will talk about the advantages of the Mac platform by comparison to the Windows platform. We will discuss networking the Mac. We will also talk about the selection of software to run the office with on the Mac system. Our discussion will cover the gamut from backup and billing to security and workflow. We will also talk about the Mac in trial.

Jeffrey Allen, Oakland, CA

11:00 a.m. - 12:00 p.m.

Law Practice Management Track

The Nine Steps To a Successful Practice

To achieve success, a lawyer must have three things:

- The lawyer must know the law.
- The lawyer must have paying clients for whom to practice.
- The lawyer must manage the practice to efficiently get the work done in a manner that pleases clients and avoids ethics, malpractice complaints and produces a reasonable profit for the lawyer.

This program will cover both the techniques needed to achieve success for lawyers of all ages and all stages and also will touch upon those problems of special interest to newer lawyers.

Jay Foonberg, Beverly Hills, CA

1:15 p.m. - 2:15 p.m.

Service To Others Track

Fair Debt Collection Practices Act

This program will provide an overview of the Act. Items that will be discussed include definitions and applications, causes of action under the act, recent cases and developments in the Courts and Congress regarding the Act.

Manuel H. Newburger, Austin, TX

1:15 p.m. - 2:15 p.m.

Technology Track

Powerful Writing Techniques to Help You Persuade Judges and Win Clients

The ability to write forcefully and effectively is critical to your success as a lawyer. In this program, you will learn to write more persuasively by using the same powerful techniques that copywriters have relied on for years. You'll discover what these techniques are and how to apply them in both briefs and client-focused writing.

Presenters Lisa Solomon, Esq. and Hon. Gerald Lebovits will discuss:

- The greatest challenge your writing must overcome to persuade readers to take a desired action
- Basic concepts underlying all effective persuasive writing—ignore these and you're sunk
- How to write a compelling brief that the judge just can't put down
- The role of emotion in jurisprudence and how to trigger the reader's emotions
- The things readers absolutely hate—and how to avoid them
- How to deal with objections to your position
- Closing the deal: conclusions and calls to action
- And more

Lisa Solomon, Ardsley, NY

Hon. Gerald Lebovits, New York, NY

1:15 p.m. - 2:15 p.m.

Law Practice Management Track

Expanding Your Practice Areas and Minimizing Your Expenses

Patrick Begos will offer the Dos and Don'ts of taking on cases in New Practice Areas. While Sande Gorgart, Regional Vice President of the Regus Group, will provide the audience with Dos and Don'ts in leasing office space as you expand.

Patrick Begos, Westport, CT

Sande Gorgart, Seattle, WA

2:30 p.m. - 3:30 p.m.

Service To Others Track

Credit Card Lawsuits: Prosecuting and Defending

This program will provide information on prosecuting and defending credit card lawsuits. The panel will discuss pleadings, evidentiary rules, factual support and other requirements necessary to prosecute a case to collect a delinquent credit card debt. They will also discuss defenses, counterclaims, and other means to defend a credit card collection case.

Benjamin Sanchez, Houston, TX

Robert Hyde, San Diego, CA

Eric Fagan, Chula Vista, CA

2:30 p.m. - 3:30 p.m.

Technology Track

10 Things Every Lawyer Should Know About Software-as-a-Service

Web-based applications such as Google Docs, Salesforce.com and Zoho have transformed the way people perceive and use software. This new type of computing, called Software-as-a-Service, has already transformed the way many companies do business. New web-based practice management applications such as Clio finally bring the benefits of Software-as-a-Service to the legal market. In this talk we discuss ten aspects of Software-as-a-Service that every lawyer should be familiar with, including cost analysis, security, data privacy and protection.

Jack Newton, North Vancouver, BC, Canada

2:30 p.m. - 3:30 p.m.

Law Practice Management Track

Fees, Finance & Frugality

The lawyer-client relationship is one of trust, and that trust needs to extend to your billing and your fee structure. Good billing practices start with good communication with your clients. This session will discuss the basics of billing and how to talk to your clients about your fees. Topics will include:

- Ascertaining and managing the client's expectations
- Defining the scope of the engagement
- Identifying the desired result
- Establishing value
- Dispelling objections and misconceptions
- Creating a client-friendly fee structure
- Alternatives to the billable hour
- Explaining the fee in ways the client can understand
- Tips for good billing practices and systems
- Billing at appropriate /strategic times
- Tax returns, back to school
- Payment Processing solutions
- Payment Envelopes
- How to get paid

Allison Shields, East Setauket, NY

Kevin Chern, Chicago, IL

3:45 p.m. – 5:00 p.m.

Closing Plenary – 60 Tips Tools and Resources to Power Your Practice.

This fast-paced 60 tips format gives you useful, practical information. Software and hardware tips, practice management, legal marketing, malpractice risk reduction and ethical compliance, mobile gadgets, wireless practice, Windows issues, client services, attorney services and many other ideas a SSF lawyer would find useful. 60 ideas you can take back to your practice and use NOW!

Jeffrey Allen, Oakland, CA

J. Anthony Vittal, Oakland, CA

David Masters, Montrose, CO

Yvonne Renfrew, Los Angeles, CA