

Small Law Firm Center

NOVEMBER 2008 NEWSLETTER

NEW YORK
CITY BAR



Events

NYC BAR EVENTS OF INTEREST

**5TH ANNUAL LAW PRACTICE
MANAGEMENT SYMPOSIUM
MAKING YOUR SMALL FIRM
THRIVE IN UNCERTAIN TIMES**
WEDNESDAY, NOVEMBER 12,
2008 8:30 AM - 5:00 PM

**SMALL LAW FIRM LUNCHEON
(A THREE PART LUNCHEON
SERIES.)
GROWING YOUR PRACTICE**
THURSDAY, NOVEMBER 13, 2008
12:30 PM - 2:00 PM

**EXPLORERS AND EXPLOITS
IN ONLINE SOCIAL
NETWORKING: BALANCING
THE RISKS TO COPYRIGHTS,
PRIVACY, AND SECURITY**
THURSDAY, NOVEMBER 13, 2008
6 PM - 9 PM

**SMALL LAW FIRM
MANAGEMENT LUNCH -
FIRST OF THE FOUR PART
SERIES
SESSION ONE:
DECISION-MAKING IN THE
SMALL LAW FIRM**
TUESDAY, NOVEMBER 18, 2008
12:30 P.M. - 2:00 P.M.

CLE PROGRAMS OF INTEREST

**THE DISCIPLINARY PROCESS
- HOW IT WORKS**
Monday, November 24, 2008
9 am - 12 p.m.

New York City Bar
www.nycbar.org

FIFTH ANNUAL LAW PRACTICE MANAGEMENT SYMPOSIUM
Making Your Small Firm Thrive in Uncertain Times
NOVEMBER 12, 2008, 8:30AM - 5:00PM

"There can be economy only where there is efficiency." - Benjamin Disraeli

Amid the financial woes of the last few weeks one thing has become clear — times are tough. Consumers hesitate before spending money and small businesses are tightening their belts. It is with this predicament in mind that the Small Law Firm Center of the New York City Bar has developed this year's Fifth Annual Law Practice Management Symposium, entitled "Making Your Small Firm Thrive in Uncertain Times." Its focus is on how solo and small firm practitioners can start up, maintain and grow their firms most efficiently during an unpredictable economic climate.

The Symposium, which will be held on Wednesday, November 12, 2008 at the House of the Association and is co-hosted with the *New York Law Journal* and co-sponsored by the Association of Legal Administrators, will last from 8:30 a.m. until 5 p.m. The workshops, which will be divided into a start-up track and a track for growing firms, will include information on office space, entity choice, tech support, equipment, marketing and finance. There will be workshops on how to write a business plan and properly maintain escrow accounts as well as workshops tailored to small firm litigators and real estate practitioners. You can also learn how to join the Legal Referral Service at the New York City Bar, get advice from the Small Business Administration and brainstorm with experienced solo practitioners in our "Seasoned Solo" Drop-In Center.

Most of the workshops will last 45 minutes and will provide participants with helpful handouts and check lists to use in their practice. The cost of attendance is \$25 for New York City Bar members (\$50 for non-members) and includes admission to all workshops, exhibit hall, breakfast, lunch and the music reception. To register, please visit our website at www.nycbar.org and click on the events calendar. If you have any questions, please email aroytberg@nycbar.org

A NOTE FROM THE SLFC DIRECTOR

*"Gratitude is a quality similar to electricity:
It must be produced and discharged
and used up in order to exist at all."*

- William Faulkner

Dear Solo and Small Firm Practitioners,

While it may feel challenging to consider "giving thanks" at the end of this month, many of us should be especially grateful to our referral sources for helping us thrive during the economic turmoil of the past few months. According to leading economists the worst is not yet behind us, and we have to work especially hard to promote our small law firms during these uncertain times. Please remember to send timely and personalized thank-you notes to those who help your business.

Don't forget to register for our Fifth Annual Law Practice Management Symposium on November 12, 2008, which is entitled "Making Your Small Firm Thrive in Uncertain Times". This year's Symposium's focus is the economy and attending it would help solo and small practitioners learn how to weather the financial storms which have yet to come our way. To register for the Symposium click [here](#). For details click on the brochure.

If you are a **partner in a Small Firm**, don't miss our **Small Firm Practice Management luncheon on November 18, 2008**, tailored specifically to the needs of Small Firm partners. To learn more click [here](#). To register click [here](#).



EVENT

**Small Law Firm Luncheon -
Growing Your Practice**
(A three part luncheon series)
Thursday, November 13, 2008
12:30 - 2:00pm

Developing a mMarketing function for One or 100, Session 2: How much marketing muscle do you need to grow? Should you bring someone in house, outsource, or do it yourself? This luncheon will assist you to determine the best course of action to take, how to budget and how to measure the results.

Sponsored by Lexis/Nexis
Registration by November 10 is necessary.
The fee, which includes lunch, is \$25 for members; \$35 for non-members.

**Small Law Firm Management
Lunch - First of the four part series**
**Session One: Decision-Making in
the Small Law Firm**
Tuesday, November 18, 2008
12:30 p.m. - 2:00 p.m.

Decision-making in small partnerships is difficult because there is typically no "decider" and partners. Poor or unmade decisions often have significant negative consequences. This seminar is intended to help partners understand the issue in context and to assess their firm's decision-making qualities. At the end of the session, participants will receive a decision-making checklist and template for use in their firms.

Registration by November 12 is necessary. The fee, which includes lunch, is \$25 for members; \$50 for non-members. Attendance is limited to 20 participants.

Finally, please use the Solo/Small Firm Startup Checklist below, and bring it with you to the Symposium on November 12. It will help you organize the questions you may ask our panelists during the 10 workshops presented at the Small Law Firm Symposium

I hope to see you on November 12.

With Best Regards,
Alla Roytberg, Esq.

SOLO/SMALL FIRM STARTUP CHECKLIST

- 1. Should you be doing this?**
Analyze your business sources and level of experience.
- 2. Select an organizational structure and consult with a CPA**
Should your firm be a sole proprietorship, partnership, professional corporation or an LLC? Make sure to comply with relevant government registration and filing requirements. Establish an accounting system.
- 3. Evaluate office space options and select office space and equipment**
Do you need a plush image for special clients? Are you setting up shop on a shoestring budget? Make sure to invest in a scanner and hand held computer devices which easily synchronize to your office computers. As a solo or small firm practitioner "on the run" you will find them extremely useful.
- 4. Open bank and trust accounts.**
Review rules relating to Escrow Accounts. Select a bank. Decide whether you need a credit line to cover startup costs.
- 5. Purchase Insurance.**
You may need malpractice insurance, business liability insurance, worker's compensation and health insurance.
- 6. Establish a docket control system and a conflict checking system.**
- 7. Assess your personnel needs.**
Hire and train necessary staff. Establish a payroll system. Consider establishing a retirement plan.
- 8. Design form engagement letters, a billing system and a sample document database.**
- 9. Develop a Marketing Plan.**
Will you send fancy announcements or email notices? Will you advertise in newspapers or on the internet? Will you publish articles, network with referral sources and give informational seminars?
- 10. Re-assess the status of your practice every 3 months during the first year.**

5th Annual
Law Practice Management Symposium

Making Your Small Firm Thrive in Uncertain Times



November 12, 2008

8:30 am - 5:00 pm

New York City Bar

- Attend valuable workshops for start-ups and growing firms
- Explore the ways to expand your client base
- Attend exhibits by vendors who serve Small Firms
- Network at the breakfast, luncheon and late-afternoon live-music reception as well as in our "Seasoned Solo" Drop-In Center
- Do not miss the sessions on Escrow Accounts and the NYC Bar's Legal Referral Service

Presented by:

**NEW YORK
CITY BAR**

New York Law Journal



ASSOCIATION OF LEGAL ADMINISTRATORS®
The Source of Legal Management Information and Knowledge
New York City Chapter

WORKSHOPS

9:00 - 9:45 am: Small Firm Startup on a Shoestring Budget

Explore entity choice, office space, billing and client database programs, and insurance needs for a newly born law practice.

Moderator: **Mark Josephson**, Murray & Josephson, CPAs, LLC
Panelists: **Renard Wright**, Bertholon-Rowland Corp.
Stephen Lubner, Your Wall Street Office Inc.
Roy S. Lyons, Marsh Affinity Group Services
Paul Sans, PSN Solutions

9:00 - 9:45 am: Growing Your Firm Responsibly

How do you grow your small law firm in a cost-effective way. Which laws apply to the employment process? How do you manage your staff? How do you select a retirement plan for your office and how do you use your website to expand your client base?

Moderator: **Joseph Tremitti**, Tremitti LLC
Panelists: **Rita Thompson**, ALA
John Doyle, ABA Retirement Funds
Tony Loscalzo, Findlaw
Marcia Helfeld, Paychex, Inc.

10:00 - 10:45 am: Small Firm Marketing and Finance on a Shoestring Budget

What options are available when you need money to launch your practice? How can the US Small Business Administration help solo and small firm practitioners? Learn cost-effective marketing techniques which will help you along the way.

Moderator: **Mark Josephson**, Murray & Josephson, CPAs, LLC
Panelists: **Martha Soffer**, US Small Business Administration
Carol Schiro Greenwald, MarketingPartners

10:00 - 10:45 am: Small Firm Tech Support

Learn how to make your email work for you as an effective business tool and how to find reliable tech support. Get information on computer programs that can help your practice operate more efficiently.

Moderator: **Anthony M. Verna, III**, Law Offices of Anthony M. Verna, III
Panelists: **Alex Khan**, RPost
Harry Salavantis, Tabs3
Michael Cash, PC Law/I. Michael Cash & Associates
Ian Jackson, Inspired Professionals LLC

11:00 - 12:30 pm: Plenary Session - Escrow Accounts: Learn the Rules/ Avoid the Pitfalls

Learn what every solo and small firm practitioner needs to know about attorney escrow accounts. Get practical information on Attorney Trust Accounting and Recordkeeping, and court rules regarding missing client funds and dishonored checks.

Moderator: **Deborah Rosenthal**, Rosenthal Attorneys at Law, P.C.
Panelists: **Timothy O'Sullivan**, Executive Director and Counsel,
NYS Lawyers' Fund for Client Protection

Michael J. Knight, Deputy Counsel, NYS Lawyers' Fund for Client Protection
Sherry K. Cohen, First Deputy Chief Counsel, Departmental Disciplinary Committee, Supreme Court, Appellate Division, First Judicial Department

1:30 - 2:15 pm: Business Plans for Lawyers

Learn what it takes to write a Business Plan and why it is imperative to do it as a solo practitioner or a small firm. Review Business Plan Components - the Executive Summary, Firm Description, Market Analysis and Marketing Strategy, Competitors and Finance. Learn how to optimize your relationship with your bank once you have assessed your financing needs.

Moderator: **Robin Kravitz**, Law Office of Robin Kravitz
Panelists: **Ira Davidson**, Director, Pace University
Small Business Development Center
Berk Saka, HSBC Premier Corporate & Professional Legal Team

1:30 - 2:00 pm: Giving a Small Firm Litigator an Upper Hand to successfully compete with "the Big Guys"

Find out how to easily and cost-effectively navigate every stage of the litigation workflow. Learn to evaluate the case, your opponent's expert witnesses, and to understand a judge's thought process. This fast paced session will give you ideas and tips for streamlining your work to get more done in less time, and confidence to know that you will have the upper hand on your opponent.

Speakers: **Dustin Allen**, Field Sales Representative, Westlaw
Joseph Kraemer, Regional Field Manager, Westlaw

2:30 - 3:00 pm: Measurable, Cost-Effective Client Development Online

Learn how to develop clients online in a measured, cost-effective way. The session will explore the basics of Internet lead generation and ROI measurement.

Speaker: **Clay Cazier**, LexisNexis Martindale-Hubbell

2:00 - 2:45 pm: Real Estate Practitioners' Roundtable

How can real estate practitioners successfully overcome the challenges of today's housing market? This workshop will address latest real estate market trends and help solo and small firm practitioners effectively restructure their residential real estate practice.

Moderator: **Nathan Erlich**, Nathan Erlich, P.C.
Panelists: **Marc Lawrence**, American Land
Jason Auerbach, Wells Fargo
Alvin Ubell, Accurate Building Inspectors
Joseph M. Insalaco, 1031 Investment Services LLC
Bill Mayweather, Easy Soft

3:00 - 4:00 pm

Plenary Session

Expand Your Client Base - Business Opportunities through the Association's Legal Referral Service

Find out how to join the oldest and largest legal referral service in New York State. Learn how NYC Bar's LRS works and how it can help you expand your client base.

Speaker: **Allen Charne**, Executive Director, Legal Referral Service, a Joint Service of the New York City Bar & NYCLA

TIME	TRACK 1: START-UP FIRMS	TRACK 2: GROWING FIRMS
8:30 - 9:00 am	Networking Breakfast <i>Sponsored by Westlaw</i>	
9:00 - 9:45 am	Small Firm Start-up	Growing Your Firm Responsibly
10:00 - 10:45 am	Small Firm Marketing and Finance	Small Firm Tech Support
11:00 - 12:30 pm	Plenary Session Escrow Accounts: Learn the Rules/Avoid the Pitfalls	
12:30 - 1:30 pm	Networking Lunch <i>Sponsored by LexisNexis</i>	
1:30 - 2:15 pm	Business Plans for Lawyers	Giving a Small Firm Litigator... <i>(ends 2:00pm)</i>
2:00 - 2:45 pm		Real Estate Practitioners' Roundtable
2:30 - 3:00 pm	Client Development Online	
3:00 - 4:00 pm	Plenary Session Expand Your Client Base... Legal Referral Service	
4:00 - 5:00 pm	Wind-Down Reception with Live Music by the "Mad Jazz Hatters"	

"Seasoned Solo" Drop-In Networking Center
Brainstorm about your practice with your colleagues in the "Seasoned Solo" Drop-In Center

EXHIBITORS	TRACK 1: START-UP FIRMS	TRACK 2: GROWING FIRMS
	ABA Retirement Funds	Inspired Professionals LLC
	Accurate Building Inspectors	LexisNexis
	ALA Association of Legal Administrators	LoisLaw
	American Land	MarketingPartners
	Bertholon-Rowland Corp.	Marsh Affinity Group Services
	Easy Soft	Paychex, Inc.
	HSBC Premier Corporate & Professional Legal Team	PC Law/I. Michael Cash & Associates
		PSN Solutions, Inc.
		RPOST
		Tabs3/PracticeMaster
		Thomson Findlaw
		Translation & Interpretation Agency
		US Small Business Administration
		Wells Fargo Home Mortgage
		Westlaw
		Your Wall Street Office Inc.
		1031 Investment Services LLC.

REGISTER BY:

fax 212-768-8116 • online www.nycbar.org
 mail Small Law Firm Center, Attn. Alla Roytberg
 42 West 44th Street, New York, NY 10036

ADMISSION

\$25 Members \$50 Non-members

Admission includes exhibition hall, workshops, networking breakfast, lunch, plenary sessions, and wind-down reception with live music.
 Space is limited. Please register for Symposium sessions no later than **November 2**. No refunds of Symposium Entry Fee after **November 5**.

PLEASE INDICATE ALL SESSIONS YOU WILL BE ATTENDING

Track #1 - Small Firm Start-up...
 Track #1 - Small Firm Marketing and Finance...
 Track #1 - Business Plans for Lawyers
 Track #1 - Cost-Effective Client Development Online
 Track #2 - Growing Your Firm Responsibly
 Track #2 - Small Firm Tech Support
 Track #2 - Giving a Small Firm Litigator...
 Track #2 - Real Estate Practitioners' Roundtable
 Networking Breakfast
 Plenary Session - Escrow Accounts...
 Networking Lunch
 Plenary Session - Expand Your Client Base-...LRS
 Wind-Down Reception with Live Music

REGISTRANT

Name _____
 Firm _____
 Address _____
 Tel. _____
 Email _____

METHOD OF PAYMENT

Check enclosed for \$_____ made payable to the **New York City Bar**
 Charge \$_____ to my Mastercard Visa Amex
 If you are paying by credit card, you may fax this form to (212) 768-8116.

Account # _____
 Expiration Date _____
 Cardholder's Name _____
 Signature _____

**If you have any questions about the Symposium, please send an email to aroytberg@nycbar.org.
 For membership information, visit www.nycbar.org or call (212) 382-6665.**

SAVE THE DATE

EFFECTIVE STRESS
MANAGEMENT FOR
SOLOS AND SMALL
FIRMS IN TODAY'S
ECONOMY -

*Standing in Your Own
Way*

Tuesday, December 16,
2008 8:30 - 10:00 a.m.

The Small Law Firms
Committee at the
NYC Bar has a few
open slots. If you are
interested in becoming a
member of the
committee email your
resume to:

omedenica@wrlawfirm.com

A BRIEF LIST OF LIBRARY RESOURCES FOR SOLOS AND SMALL FIRMS

- Westlaw and Lexis available in Library free to members;
- Remote and Library electronic access to law reviews and/or journals Via HeinOnline;
- Numerous print treatises and forms also in CD format;
- Library server-based access to Matthew Bender treatises/forms and McKinney's Forms;
- Remote access to limited Westlaw forms;
- Copy service fax and e-mail (PDF) requests;

For Further Information - Click here <http://www.nycbar.org/Library>

SMALL LAW FIRM FACILITIES - A UNIQUE FREE BENEFIT TO MEMBERS

Attorney Work Space

Mon-Thur 9:00 a.m. - 8:30 p.m.
Fri 9:00 a.m. - 6:00 p.m.
Sat 10:00 a.m. - 3:00 p.m.

Conference Room

Mon-Thur 9:00 a.m. - 8:30 p.m.
Fri 9:00 a.m. - 6:00 p.m.
Sat 10:00 a.m. - 3:00 p.m.

NOTE: Attorney Work Space is available on a walk-in basis, except during the hours of 12:00 p.m. and 2:00 p.m. Between 12:00 p.m. and 2:00 p.m. the Worrok Spaceit must be reserved as a conference room. The Conference Room can be reserved for 2 hour intervals daily except during the hours of 12:00 p.m. and 2:00 p.m. If you wish to reserve a conference room between 12:00 p.m. and 2:00 p.m. the Attorney Work Space currently serves as a secondary conference room during those times. To make a reservation contact the reference desk of the Library at (212) 382-6666 or email rnrvis@nycbar.org.

Due to the increase in demand for the Small Law Firm Center members will be limited to making no more than one reservation per day and not more than 3 reservations per week.

Small Law Firm Center Online Discussion Forum

If you would like to post a question click [here!](#)