

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**, USI Affinity formerly USI Bertholon Rowland
Stephen Luber, 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/Lexis Back Office & Dragon Naturally Speaking
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 Cazler**, 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

ABA Retirement Funds	LexisNexis	Tabs3/PracticeMaster
Accurate Building Inspectors	LoisLaw	Thomson Findlaw
ALA Association of Legal Administrators	MarketingPartners	Translation & Interpretation Agency
American Land	Marsh Affinity Group Services	US Small Business Administration
Easy Soft	Paychex, Inc.	USI Affinity formerly Bertholon Rowland
HSBC Premier Corporate & Professional Legal Team	PC Law/Lexis Back Office & Dragon Naturally Speaking	Wells Fargo Home Mortgage
Inspired Professionals LLC	PSN Solutions, Inc.	Westlaw
	RPOST	Your Wall Street Office Inc.
		1031 Investment Services LLC.

REGISTRATION

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 # _____
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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.