

4th Annual Law Practice Management Symposium



CHARTING THE COURSE OF YOUR LAW PRACTICE

NOVEMBER 1, 2007

8:30 am - 5:00 pm
New York City Bar

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

- 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 retainer agreements and stress management

WORKSHOPS

9:00 - 9:45 am: Setting Sail - Start-up Basics I

Explore entity choice, office space and equipment/supplies options, insurance needs and start up tech support for a newly born law practice.

Moderator: **Mark Josephson**, Murray & Josephson, CPAs, LLC
 Panelists: **Susan Blits**, Bertholon-Rowland Corp.
Roy S. Lyons, Marsh Affinity Group Services
Bob Ripp, Ikon North America
Ian Jackson, Inspired Professionals LLC
Bud Palumbo, Westlaw

9:00 - 9:45 am: Finding Your Crew - Employment Issues for Growing Firms

Whom should you hire and how? Learn which laws apply to the employment process and how to manage employees.

Moderator: **Joseph Tremitti**, Tremitti LLC
 Panelists: **Paul Sans**, PSN Solutions, Inc.
Pauline Amsellem, ALA, New York City Chapter
Charles A. Volkert, III, Esq., Robert Half Legal
John Gregory, ADP

10:00 - 10:45 am: Financing the Voyage - Start Up Basics II

What options are available when you need money to launch your practice? How do you optimize your relationship with your bank to facilitate growth? Learn how to obtain letters of credit, credit lines and small business loans. Get financing advice for you and your clients from a financial institution and the US Small Business Administration.

Moderator: **Mark Josephson**, Murray & Josephson, CPAs, LLC
 Panelists: **Berk Saka**, HSBC Legal Services Team
Martha Soffer, US Small Business Administration

10:00 - 10:45 am: Staying Afloat-Technology for Growing Firms

Learn to create websites, market on the internet, protect the content of your emails, safeguard against loss of computer data and keep track of your clients and your bills.

Moderator: **Anthony M. Verna, III**, Law Offices of Anthony M. Verna, III
 Panelists: **Therese O'Brian**, Findlaw
Alex Khan, RPost
Herb Kraff, SOS Online Backup
Harry Salavantis, Tabs3/PracticeMaster
Mark Kucharovic, Evault, Inc.
Tim E. Staggs, Staggs Legal Marketing Services
Michael Cash, PC Law/I. Michael Cash & Associates

11:00 - 12:00 pm: Plenary Session - Getting on Board with Retainer Agreements

In many situations, the law requires that the attorney-client relationship be memorialized in either a letter of engagement or a retainer agreement. We will discuss when the law requires letters of engagement or retainer agreements and the legal, ethical, and practical issues you should consider when you draft them.

Panelists: **Deborah Rosenthal**, Rosenthal Attorneys at Law, P.C. **Martin Feinberg**, Former Chair, Joint Committee on Fee Disputes and Conciliation

1:00 - 1:45 pm: Building the Ship - 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.

Moderator: **Robin Kravitz**, Law Office of Robin Kravitz
 Panelists: **Ira Davidson**, Director, Pace University
 Small Business Development Center
Thomas P. Hennessy, JPMorganChase Bank, N.A.
Paramjit Mahil, Sun Communications Group

1:00 - 1:45 pm: Expanding Your Horizons - 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 Chame**, Director of LRS, New York City Bar

2:00 - 2:45 pm: Winds of Change - Basics of Internet Client Development

As the Internet becomes an increasingly popular tool for client development, many law firms find themselves struggling to break into the market. This 30 minute session will answer questions like "How can the Internet help my practice?" and, in turn, "How can I help my website succeed?" By learning how to reach potential clients while they are making a decision about their legal future, firms can better leverage the medium to grow their practice.

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

2:00 - 2:45 pm: Scenic Tour of the NYC Bar - Explore the Library and Small Law Firm Center Facilities

Explore the country's largest private law library and Small Law Firm Center Conference Room and Attorney Workspace which are available for free to member of the NYC Bar.

Tour Guide/Host: **Ronald Mirvis**, Head of Reference Services, New York City Bar

3:00 - 4:00 pm Plenary Session - Finding Your Coast of Utopia Cultivating Work-Life Synergy for A Solo or Small Law Firm Practitioner

This workshop will help you build real skills and achieve personal and professional success by managing Time, Relationships and Tasks in your legal and personal experience.

Moderator: **Eileen Travis**, Director of Lawyer Assistance Program, New York City Bar
 Speaker: **Arnie Herz**, Legal Sanity Learning Programs

TIME	TRACK 1: START-UP FIRMS	TRACK 2: GROWING FIRMS
8:30 - 9:00 am	Networking Breakfast	
9:00 - 9:45 am	Start-up Basics I	Employment Issues for Growing Firms
10:00 - 10:45 am	Start-up Basics II	Technology for Growing Firms
11:00 - 12:00 pm	Plenary Session Retainer Agreements	
12:00 - 1:00 pm	Networking Lunch <i>Sponsored by LexisNexis</i>	
1:00 - 1:45 pm	Business Plans for Lawyers	Legal Referral Service
2:00 - 2:45 pm	Basics of Internet Client Development	Explore the Library and Small Law Firm Center Facilities
3:00 - 4:00 pm	Plenary Session Cultivating Work-Life Synergy for A Solo or Small Law Firm Practitioner	
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

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|---|-------------------------------------|----------------------------------|
| Accurate Building Inspectors | IKON North America | Robert Half Legal |
| ADP | Inspired Professionals LLC | RPOST |
| ALA Association of Legal Administrators | JPMorganChase Bank, N.A. | SOS Online Backup |
| American Land | LexisNexis | Staggs Legal Marketing Services |
| Bertholon-Rowland Corp. | Marsh Affinity Group Services | Tabs3/PracticeMaster |
| EVault, Inc. | PC Law/I. Michael Cash & Associates | Thomson Findlaw |
| HSBC Premier Corporate & Professional Legal Services Team | PSN Solutions, Inc. | US Small Business Administration |
| | | Westlaw |

REGISTER BY:

REGISTRANT

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

ADMISSION

- \$15 Members \$50 Non-members

Admission includes exhibition hall, workshops, networking breakfast, lunch sessions, and wind-down reception with live music.

Space is limited. Please register for Symposium sessions no later than **October 20**. No refunds of Symposium Entry Fee after **October 25**.

PLEASE INDICATE ALL SESSIONS YOU WILL BE ATTENDING

- Track #1 - Start-up Basics I
- Track #1 - Start-up Basics II
- Track #1 - Business Plans for Lawyers
- Track #1 - Basics of Internet Client Development
- Track #2 - Employment Issues for Growing Firms
- Track #2 - Technology for Growing Firms
- Track #2 - Legal Referral Service
- Track #2 - Explore the Library and Small Law Firm Facilities
- Networking Breakfast
- Plenary Session - Retainer Agreements
- Networking Lunch
- Plenary Session - Cultivating Work-Life Synergy
- Wind-Down Reception with Live Music

METHOD OF PAYMENT

- Check enclosed for \$_____ made payable to the
New York City Bar
- Charge \$_____ to my Mastercard Visa Amex
- Account # _____
- Expiration Date _____
- Cardholder's Name _____
- Signature _____

If you have any questions about the Symposium, please send an email to aoytberg@nycbar.org.

For membership information, visit www.nycbar.org or call (212) 382-6665.