Constructing a Masterpiece

THURSDAY, NOVEMBER 12, 2015
8:30 AM - 5:00 PM

NEW YORK CITY BAR
42 West 44th St | Manhattan

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Startup Office, Mail Address and Phone Answering Service

ZOLA  
Practice Resource Planning Application for Small Law Firms
Agenda

9 am - 10 am  PLENARY  Get More Clients!

Being a phenomenal lawyer isn’t enough. If you want to have a thriving legal career, you have to become a marketing genius. In this practical and information-packed session, you will learn how to effectively market on and off line, how to utilize your website and other resources to strategically create a rush of clients to fill your law practice and how to manage your online reputation.

Moderator/Speaker:  David Post, DVP Advisors, Inc.
Speakers:  Claudia Hernandez, Innovate Online Marketing Group
           Dan Lear, Avvo

10:15 am - 11 am  TRACK 1  Small Firm Startup on a Shoestring Budget

Explore budget options, startup accounting, startup tech and cost-effective office operations for a solo practitioner or a newly formed small law firm.

Moderator:  Mark Josephson, Murray & Josephson, CPAs, LLC
Speakers:  Alex Englard, Interstate Filings, LLC
           Steve Luber, Your Wall Street Office
           Mairim Vant, Effective Solutions Plus, Inc.

10:15 am - 11 am  TRACK 2  Growing Your Firm While Minimizing Your Overhead

Learn how to make your small practice grow and operate more efficiently through outsourcing compliance, accounting, IT, marketing and other components of the small law firm practice.

Moderator/Speaker:  Timothy Borchers, CT
Speakers:  James Bailey, Bailey Duquette P.C.
           Todd Rengel, Animus Rex

11:15 am - Noon  PLENARY  7 Main Parts of Every Successful Law Firm

Most attorneys start a law firm with little or no education or training on how to build a small business. So, they do what comes naturally. They build a practice, and focus on doing quality work for their clients, and being the best, most professional lawyer they can be. In this engaging presentation we will explain the 7 Main Parts of every law firm: whether you are just starting out or are already grossing 7 figures with your small/solo firm. Understanding these 7 parts and how they interact to either help or hinder your firm’s growth is critical for every Solo or Small Firm owner. It’s time to stop treating your firm like a “practice” and start treating it like the business that it is!

Moderator:  TBD
Speaker:  Christopher T. Anderson, How to Manage a Small Law Firm
Join a Networking Group, Mentoring Circle or a Committee to develop lasting relationships, get help with your practice and learn more about your substantive legal area of interest. Find out how to join the NYC Bar’s Legal Referral Service to get more clients. Get valuable information about legal research, membership benefits, NYC Bar Virtual Law Firm Program and other programs specifically designed to help solos and small firm practitioners.

**Moderator/Speaker:** Alla Roytberg, Director, Small Law Firm Center, New York City Bar  
**Speakers:**  
Fred Cohen, ZOLA  
Christopher Stock, LEAP  
MaryJan Kelly, Thomson Reuters Westlaw  
Willie Mullen, Smokeball  
Scott Pollack, Mercer Worklife

Learn why you need to use tech tools and how to use technology to standardize and structure workflow, effectively manage daily tasks and use practice management tools to deliver high level of service to clients and compete with larger firms.

**Moderator:** Robin Kravitz, Kravitz Law PLLC  
**Speakers:**  
Fred Cohen, ZOLA  
Christopher Stock, LEAP  
MaryJan Kelly, Thomson Reuters Westlaw  
Willie Mullen, Smokeball

Learn the basics of opening an escrow account and complying with the labyrinth of regulations relating to those accounts. Beyond discussing lawyers’ obligations under the Rules of Professional Conduct, the program will take a practical approach, through the use of real world stories and events, to helping lawyers avoid the pitfalls of managing other people’s money.

**Speaker:** Katie M. Lachter, Hinshaw & Culbertson, LLP

Discuss the art of structuring fee proposals for prospective and existing clients, which could include alternative billing arrangement. Learn about retainer and billing best practices across various practice areas common to small firms. Learn how using best practices can help improve your bottom line. Brainstorm about how to overcome obstacles when talking to clients about money.

**Moderator/Speaker:** Gary Kaufman, The Law Office of Gary Kaufman PLLC  
**Speakers:**  
Everett Carbajal, Law Office of Everett Carbajal PC  
Olivera Medenica, Medenica Law PLLC  
Robin Kravitz, Kravitz Law PLLC

**PLENARY** Other People’s Money — The Nuts, Bolts and Pitfalls of Escrow/IOLA Accounts  (1 CLE CREDIT)

**PLENARY** Billing to Get Paid: Retainers, Billing Practices Small Firm Roundtable

**WINE/MUSIC/RAFFLE - RECEPTION**
Registration

REGISTER:  
online  www.nycbar.org
by fax  212.768.8116
by mail  New York City Bar
        42 West 44th Street,
        New York, NY 10036
        Attn. Alla Roytberg

ADMISSION:

Register on or before October 1, 2015:
$50 Member     $85 Non-members*

Register after October 1, 2015:
$65 Member     $100 Non-members*

Admission includes exhibition hall, workshops, 1 CLE Credit, networking breakfast, lunch, plenary sessions, and wind-down reception with wine, beer and gift raffle.

Space is limited. Please register for Symposium sessions no later than October 30. No refunds of Symposium Registration Fee after November 1.

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

Yes, I’d like to hear more from the exhibitors.
I understand that by checking this box, the City Bar will share my name and contact information with the Symposium exhibitors so I can receive information about their products, services, and special offers.

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Agenda
Please indicate all sessions you will be attending:

TRACK 1

8:30 AM - 9 AM  ☐ Networking Breakfast  Sponsored by
9 AM - 10 AM  ☐ Plenary Session:  Get More Clients!
10:15 AM - 11 AM  ☐ Small Firm Startup on a Shoestring Budget
11:15 AM - 12 PM  ☐ Plenary Session:  7 Main Parts of Every Successful Law Firm
12 PM - 1 PM  ☐ Networking Lunch  Sponsored by LEAP
1 PM - 2 PM  ☐ Increasing Your Firm’s Business by Utilizing NYC Bar Resources
2 PM - 3 PM  ☐ Plenary Session:  Other People’s Money — The Nuts, Bolts and Pitfalls of Escrow/IOLA accounts (1 CLE Credit)
3 PM - 3:45 PM  ☐ Plenary Session:  Billing to Get Paid: Retainers, Billing Practices Small Firm Roundtable
4 PM - 5 PM  ☐ Networking Reception  Sponsored by CT Corporation

TRACK 2

8:30 AM - 9 AM  ☐ Networking Breakfast  Sponsored by
9 AM - 10 AM  ☐ Plenary Session:  Get More Clients!
10:15 AM - 11 AM  ☐ Growing Your Firm While Minimizing Your Overhead
11:15 AM - 12 PM  ☐ Plenary Session:  7 Main Parts of Every Successful Law Firm
12 PM - 1 PM  ☐ Networking Lunch  Sponsored by LEAP
1 PM - 2 PM  ☐ Small Firm Tech - Essential Tech Tools for Practice Management
2 PM - 3 PM  ☐ Plenary Session:  Other People’s Money — The Nuts, Bolts and Pitfalls of Escrow/IOLA accounts (1 CLE Credit)
3 PM - 3:45 PM  ☐ Plenary Session:  Billing to Get Paid: Retainers, Billing Practices Small Firm Roundtable
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“Seasoned Solo” Drop-In Networking Center
Brainstorm about your practice with your colleagues in the “Seasoned Solo” Drop-In Center