

NEW YORK  
CITY BAR

*New York City Journal*

12th Annual

# SMALL LAW FIRM PRACTICE MANAGEMENT SYMPOSIUM



# Constructing a Masterpiece

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

**NEW YORK CITY BAR**  
42 West 44th St | Manhattan

[www.nycbar.org](http://www.nycbar.org)

# Exhibitors

## **Animus Rex**

*Websites and Apps for Lawyers*

## **Avvo**

*Helping Great Lawyers Get More Business*

## **Carr Workplaces**

*Versatile Office Solutions (NYC Bar Member Benefit)*

## **Casemaker**

*Legal Research (NYC Bar Member Benefit)*

## **Clio**

*Practice Management Simplified*

## **CT**

*Registered Agent, Incorporation and Compliance  
Services for Small Law Firms  
Conference Reception Sponsor*

## **DVP Advisors, Inc.**

*Management Consulting and Strategic Planning*

## **Effective Solutions Plus, Inc.**

*Comprehensive Tech Support for Small Businesses*

## **Findlaw**

*Websites for Law Firms*

## **How to Manage a Small Law Firm**

## **Happy Lawyers Make More Money**

*Conference Breakfast Sponsor*

## **Ignite Brand Group, LLC**

*Branding and Logos for Small Firms*

## **Innovate Online Marketing Group**

*Websites and Online Marketing*

## **Interstate Filings, LLC**

*Incorporation Services for Law Firms*

## **LawPay**

*Credit Card Processing for Lawyers*

## **LEAP**

*Everything you need to run a small law firm  
Conference Lunch Sponsor*

## **Mercer**

*NYC Bar Member Insurance*

## **New York City Bar Association**

## **New York Law Journal**

## **Platinum Filings**

*Corporate Services for Law Firms*

## **Smokeball**

*Software for Small Firms*

## **Thomson Reuters Westlaw**

*Legal Solutions, Legal Research, Cloud-based  
Practice Management software*

## **Trinet**

*Outsourced HR*

## **Your Wall Street Office**

*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

**1 pm - 2 pm**

**TRACK 1 Increasing Your Firm's Business By Utilizing NYC Bar Resources**

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:** **George Wolff**, Executive Director, New York City Bar - Legal Referral Service (LRS)  
**Arlene Bein**, Director of Membership & Marketing, New York City Bar  
**Ronald Mirvis**, Head Librarian, New York City Bar Library  
**Rebecca Skeeles**, Casemaker  
**Everett Carbajal**, Law Office of Everett Carbajal, P.C.  
**Scott Pollack**, Mercer Worklife

**1 pm - 2 pm**

**TRACK 2 Small Firm Tech — Essential Tech Tools for Practice Management**

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

**2 pm - 3 pm**

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

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

**3 pm - 3:45 pm**

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

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

**4 pm - 5 pm**

**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](http://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.

**REGISTRANT**

Name \_\_\_\_\_  
 Firm \_\_\_\_\_  
 Law School \_\_\_\_\_  
 Address \_\_\_\_\_  
 Tel. \_\_\_\_\_  
 Email \_\_\_\_\_

**METHOD OF PAYMENT**

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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* 
- 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* 

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