

New York Law Journal

NEW YORK
CITY BAR

13TH ANNUAL

SMALL LAW FIRM PRACTICE MANAGEMENT SYMPOSIUM

**LEARN HOW TO GROW
YOUR PRACTICE**

THURSDAY, NOVEMBER 10, 2016

8:30 AM - 5:00 PM

NEW YORK CITY BAR 42 West 44th St | Manhattan
2 CLE Credits Available

www.nycbar.org

EXHIBITORS

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(NYC Bar Member Benefit)*

Casemaker

Legal Research (NYC Bar Member Benefit)

Clio

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CosmoLex

Your entire law office - on the cloud

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*Comprehensive Tech Support
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How to Manage a Small Law Firm

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*Startup Office, Mail Address
and Phone Answering Service*

ZOLA

*Practice Resource Planning Application
for Small Law Firms*

SCHEDULE

Check-In and Networking Breakfast 8:30 AM - 9:00 AM

PLENARY

Moneyball for Lawyers - Managing by the Numbers to get Major League Results

9:15 AM - 10:00 AM

In the hit movie, "Moneyball" the General Manager of a small-budget team adopts a numbers-based approach from a young Yale graduate to try to do more with less. Along the way, he faces ridicule from his board, obstruction from the team manager and general derision. This new way of thinking violates all of the conventional wisdom. Of course, the conventional wisdom makes it clear he just can't compete with the budget he has.

The legal profession has its own conventional wisdom. Yet some small firm owners, including solos, are finding that paying attention to the numbers we will discuss, and adopting a new way of thinking about their businesses, is allowing them to reach major league success.

In this session, we will discuss the six numbers that every law firm stakeholder must know, and the six key reports you should be looking at every month and every week. We will discuss why you're in this business in the first place, and how to use your law firm to achieve your own success, while delivering quality service to your clients.

Speaker: **CHRISTOPHER ANDERSON**, How to Manage a Small Law Firm

TRACK 1

The Basics of Small Firm Startup 10:15 AM - 11:00 AM

Explore startup office space needs, banking, legal notices and forms, tech needs, websites and online marketing. You'll get helpful information that you'll need to start your own firm.

Moderator: **MARK JOSEPHSON**, Murray & Josephson, CPAs, LLC

Speakers: **ALEX ENGLARD**, Interstate Filings; **LARRY MCELROEN**, Sterling Bank; **STEVE LUBER**, Your Wall Street Office; **KATE THOMPSON**, LEAP; **MAIRIM VANT**, Effective Solutions Plus

TRACK 2

How to Effectively Grow Your Firm Through Social Media, Online and In the Cloud

10:15 AM - 11:00 AM

Hear from our panel of experts and explore ways to grow your firm effectively through use of website, blogs and cloud-based law practice management tools.

Moderator: **GARY KAUFMAN**, Gary Kaufman PLLC

Speakers: **FRED J. COHEN**, ZOLA; **RICK KABRA**, CosmoLex; **KEVIN O'KEEFE**, LexBlog, Inc.; **TODD RENGEL**, Animus Rex

PLENARY

Entity Choice: Corporations vs. LLCs 11:00 AM - 12:00 PM

1 CLE Credit for Professional Practice

The entity structure you choose for a new business formation has far-reaching consequences. Improve your decision-making with this in-depth seminar that compares and contrasts the characteristics of corporations and limited liability companies as well as the advantages and disadvantages of each.

Learn about these key criteria: Entity characteristics, Taxation, Non-tax advantages, Management, Owners' rights, Duties and liabilities, Operational issues and Doing business in foreign states. Plus, learn best practices for formation, maintenance and dissolution to avoid costly administrative missteps.

Speaker: **LORI ANN FOX**, Wolters Kluwer's CT Corporation

Networking Lunch and Learn More About NYC Bar Benefits and Resources

12:15 PM - 1:00 PM

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: **ARLENE BEIN**, Senior Director, Membership & Marketing, New York City Bar

Speakers: **JOAN HOGARTH**, Law Office of Joan D. Hogarth; **SHAN THEVER**, Director, Small Law Firm Center, New York City Bar; **JOE TREMITI**, Legal Referral Service Panel Member; **RICHARD TUSKE**, Director, Library Operations, New York City Bar

PLENARY

How to Go Paperless. It's Not as Hard as You Think **1:15 PM - 2:00 PM**

Converting your firm to a paperless operation can seem like an overwhelming challenge. But it's not as complicated as you think. You can start now. In this session, you will learn about the essential systems, tools and workflows of a paperless office, how to automate legal document creation, and how to optimize your use of practice management software in a paperless environment. We'll share the story of a lawyer who took his firm paperless, the process the firm went through and the protocols and conventions they established.

Speaker: **LARRY PORT and TIM BARAN**, Rocket Matter

PLENARY

Unleashing the Power of Casemaker: A One-Hour Live Session **2:00 PM - 3:00 PM** **1 CLE Credit for Practice Management**

City Bar members have free remote access to Casemaker – a comprehensive legal research library. This live program will provide an overview on how to use the Casemaker library to your best advantage. Topics covered include research techniques, resources, saving research results and annotating and organizing research results for incorporation into memoranda or briefs. This live demonstration of Casemaker's latest features will assist lawyers in using the library most effectively, whether they are new to Casemaker or have used it in the past.

Speaker: **REBECCA SKEELES**, Casemaker

PLENARY

Lessons Learned: Small Law Firm Owners' Roundtable **3:15 PM - 4:00 PM**

Panelists will give their unique perspective on major challenges and lessons learned as their practices grew from one person to multi-attorney, multi-jurisdictional operations. We will discuss overcoming the challenge of choosing and maintaining a partnership practice and expanding services and practice areas to grow your business. Audience participation is encouraged as we hope to have a lively discussion of issues of particular interest to audience members.

Moderator: **MIRA WEISS**, Weiss Law Group PLLC, Chair of the Small Law Firm Committee

Speakers: **NEIL GARFINKEL**, Abrams Garfinkel Margolis Bergson, LLP; **CHERYL MOIN**, Hill & Moin, LLP

Wine Reception and Raffle **4:00 PM - 5:00 PM**

Be sure to visit all exhibitors to enter the raffle for great prizes.

REGISTRATION

REGISTER ONLINE
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42 West 44th Street
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AGENDA AT-A-GLANCE

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SEASONED SOLO DROP-IN CENTER
Brainstorm about your practice with your colleagues.

Register on or before September 30, 2016:

\$50 Member \$85 Non-members*

Register after September 30, 2016:

\$65 Member \$100 Non-members*

Admission includes Exhibit Hall, Workshops, Networking Breakfast, Lunch, Plenary Sessions, and Wine Reception.

Space is limited. No refunds of Symposium registration fees after November 1.

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

REGISTRANT

Name _____

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Check for \$ _____ enclosed.

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