

Solo and Small Firm Conference 2019 Success Beyond Tech

Cosponsored by the Solo and Small Firm Section

Register now at www.osbar.org/seminars (search for SSFC19)



Friday & Saturday, Sept. 20-21, 2019

Friday: 9 a.m.–5 p.m.

Saturday: 8:30 a.m.–12:15 p.m.

Oregon State Bar Center

16037 SW Upper Boones Ferry Rd., Tigard

CLE credits: 4 General, 3.5 Ethics, 1 Business Development, and 1 Personal Management

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Aside from knowing the law, being a successful solo or small firm practitioner also means being skillful in a variety of business-related areas, including management, communications, and collaboration. All too often, you are told that technology will do all of this for you—but you quickly learn that it takes more than tech to run a successful practice. At this year's Solo and Small Firm Conference learn how to develop and hone these non-tech skills to grow and maintain a thriving law practice.

Look to the general sessions for issues common to all law practices, including building trust with clients and opposing counsel, legal ethics, an overview of recent tax law changes, and how to get quality client referrals. Select between four breakouts to focus on specific topics that fit your individual needs, including key employment concepts for building a productive legal team, contract drafting and ethics for transactional lawyers, writing skills for litigators, and a panel featuring seasoned solo attorneys sharing what they have learned and changed since starting their practices.

Register now for the webcast* to start advancing your practice.

**Breakout sessions A and D will be available as audio CDs and MP3 files. Complimentary copies will be available upon request.*

WEBCAST



\$139

Regular registration

(Electronic materials are included with your registration.)

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Questions or need help with registration?

Call the OSB CLE Service Center:

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FRIDAY, Sept. 20

8:00 Continental Breakfast and Registration

9:00 Building Trust with Clients and Opposing Counsel

Trust leads to the flow of information and is the foundation of every relationship, both professionally and personally. Learn how to gain trust and use it once you have it, from negotiations during a case matter to establishing and maintaining your law practice.

Kwame Christian, *American Negotiation Institute, Columbus, OH*

10:00 Tax Matters for Solo and Small Firms

Successful solo or small firm practitioners are also savvy small business owners; staying on top of tax issues is crucial. Gain an overview of recent tax laws changes that can affect your practice so you can recognize tax issues before they become tax problems.

Paul Britton, *Heltzel Williams PC, Salem, OR*
Barbara Smith, *Heltzel Williams PC, Salem, OR*

11:00 Break

11:20 Breakout A—The DIY Solo

Either you did it or you're thinking about it: going out on your own and forming a solo or small firm. You still don't have staff, and every once in a while—daily?—you wonder what others are doing, what they've learned, and how they've improved their practices since they started up. This lively panel of solo attorneys will explore a wide range of topics about what they do to succeed. Come for ideas and bring your questions.

Drake Aehegma, *Attorney at Law, Portland, OR*
Karen Mockrin, *Attorney at Law, Tigard, OR*
Ksen Pallegedara Murry, *KPM Law LLC, Milwaukie, OR*
Lee Wachocki, *Professional Liability Fund, Tigard, OR*

Breakout B—Beyond Employment Law 101: Being a Good Boss is Good for Business (Available via webcast)

Developing a productive employer/employee relationship is part of a successful law practice. Even with a single employee you need to know the basics of how to navigate the law.

One of Oregon's top employment law lawyers and an experienced law firm COO will share their insight about what makes a productive legal team, along with pointers on effective hiring and when and how to part company.

Paula Barran, *Barran Liebman LLP, Portland, OR*
Denise Gaskin, *Schwabe Williamson & Wyatt PC, Portland, OR*

12:20 Box Lunch (for in-person event) Thank you to our lunch sponsor Clio

1:30 Communication, Conflicts, and Common Sense: Running an Ethical Law Practice

85% of malpractice suits result simply from mishandling the attorney-client relationship. The skills lawyers need are rarely taught in law school. This fast-paced hour will look at everything from interview skills (and the two questions you always must ask) to understanding ethical duties, client communication, and running a modern office.

Claude Ducloux, *National Director of Education, Ethics and State Compliance, LawPay, Austin, TX*

2:30 Transition Break

2:40 Breakout C—The Ethics in Contract Drafting (Available via webcast)

Take a look at six common situations where lawyers make drafting errors and run into trouble. Ideal for transactional attorneys.

Claude Ducloux, *National Director of Education, Ethics and State Compliance, LawPay, Austin, TX*

Breakout D—Why Litigators Who Write Well Win

You're not an appellate lawyer. You don't have associates to do the research and writing you labored through in law school. Attorneys who litigate at the front lines still need writing skills to win. Gain advice and tips for putting your best foot forward in what and how you write, and learn how to get the attention and respect of the trial judge before, during, and after court.

The Honorable Stephen Bushong, *Presiding Judge, Multnomah County Circuit Court, Portland, OR*

The Honorable Kelly Skye, *Multnomah County Circuit Court, Portland, OR*

3:40 Break

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4:00 Personality Based Persuasion

Learn about different personality types and the various traits that make certain personalities susceptible to different types of persuasion. Discover how to interact and analyze people through casual conversations and develop persuasion techniques that can benefit your law practice and your personal life.

Kwame Christian, *American Negotiation Institute, Columbus, OH*

5:00 Adjourn

SATURDAY, Sept. 21

8:00 Continental Breakfast and Late Registration

8:30 The Ethics of Fee Sharing: Referrals, Co-Counsel, and Freelancers

Are you aware of the ethical implications when lawyers associate with other lawyers to assist in performing legal tasks or drafting documents? What does it mean to be a freelance lawyer? When must the client be consulted and the hiring approved? What are the duties of confidentiality? Explore the answers to these and other related questions and learn best practices to observe when hiring, referring, or being hired by another law firm.

Claude Ducloux, *National Director of Education, Ethics and State Compliance, LawPay, Austin, TX*

10:00 Break

10:15 Clio's Legal Trends Report—What You Need to Know

Clio helps attorneys become client-centered and firm-focused. Its 2018 report shares vital aspects about what drives success in a legal practice. Dive into data provided by tens of thousands of legal professionals and gain insight to key questions, such as how much to charge and what services clients are seeking.

Emily van Siereveld, *Clio Specialist, West Linn, OR*

11:15 The Rainmaking Game

You don't need a huge internet presence to be a good rainmaker. Learn how to build upon existing relationships and skills to get quality referrals. Create an action plan to target the clients you want. Whether you want to start with some small steps or think big, this program will help you take your practice to the next level.

Gil Price, *PMG, Seattle, WA*

12:15 Adjourn

Section Planning Committee

Chris Rounds, *Chair, Rounds Law Office, Vancouver, WA*

Rob Hofmann, *The Hofmann Legal Group, Davis, CA*

Elizabeth Inayoshi, *The Law Office of EJ Inayoshi LLC, Hillsboro, OR*

Hertsel Shadian, *Hertsel Shadian Attorney at Law LLC, Tualatin, OR*

Products

SSFC19.CD

Audio CDs with electronic materials \$275
(includes all breakout sessions.)

SSFC19.OD

On demand with electronic materials \$275
(Breakouts A and D are available as audio CDs and MP3 files. Complimentary copies are available upon request.)

Please visit www.osbar.org/seminars and search for SSF19. On-demand access is available for 60 days after the date of purchase.

General Information

Cancellations: Cancellation requests must be received by the OSB CLE Service Center at least 72 hours prior to the date of the seminar to qualify for a refund. Refunds are subject to a \$25 cancellation fee.

Tuition Assistance: Email a request stating your financial situation to cle@osbar.org no later than one week before the seminar.

Dietary Restrictions or Accessibility Accommodations: Please call (503) 431-6326 or (800) 452-8260, ext. 326, at least 72 hours before the date of the seminar.