The Chicago Bar Association presents

Opening a Law Firm

Thursday, January 14, 2010 • 8:00 a.m. to 5:15 p.m.
Friday, January 15, 2010 • 8:00 a.m. - 5:15 p.m.
Saturday, January 16, 2010 • 8:15 a.m. - 1:05 p.m.
The Chicago Bar Association • 321 S. Plymouth Ct., Chicago, IL

Earn up to 15 IL MCLE Credit, including 4 IL professional responsibility credit.

Are you...

A **LAW STUDENT** considering hanging up your shingle?

A **YOUNG ATTORNEY** in need of a road map to guide your initial planning, implementation, and on-going management of your new practice?

An **ATTORNEY IN TRANSITION** at an existing practice, thinking about going solo or setting up a new firm?

Then...you should attend this new seminar to gain a systematic overview of the preparation necessary to launch a new practice. Get practical, organized guidelines for management and operational issues that impact the success or failure of a new office.

Get the information you need to open your new firm with success and efficiency!

–Thursday, January 14, 2010–

8:00 WELCOME & COURSE INTRODUCTION
CONTINENTAL BREAKFAST

8:30 - 9:30 STEP 1: WRITING A BUSINESS PLAN
What are the necessary elements of a business plan and how far out do you plan? Learn how to identify costs and revenue sources and create an initial budget.
Martin P. Greene, *Greene and Letts*

9:45 - 11:15 WHERE'S MY OFFICE?
From operating a home office, or renting at an Executive Suite, to leasing a full time office, discover the risks and benefits of each. Learn what to look for when negotiating a lease.
David J. Gelfand, *Colliers Bennett & Kahnweiler Inc.*
R. Andrew Smith, *Law Offices of R. Andrew Smith*
Edward Salomon, *Robbins Salomon & Patt Ltd.*

All attendees will receive a PDF copy of "Opening and Managing a Law Practice: Checklists and Worksheets for the Successful and Profitable Practice of Law"

11:15 - 12:30 SOLO OR WITH OTHERS
Do you have the personality to go solo? Should you create an online law firm with other attorneys? Also covered: what to consider before forming a partnership or sharing office space, business entity types, and partnership and shareholder agreements.
Maurice Grant, *Grant Schumann LLC*
Bob Wilson, *High Potential Inc.*

12:30 - 12:45 BOX LUNCH PICK-UP

12:45 - 1:10 CBA LAWYER REFERRAL SERVICE & GETTING COURT APPOINTMENTS
Learn about these client development tools while you eat lunch.

1:15 - 2:15 PERSONNEL CONSIDERATIONS
Learn how to determine your staffing needs and what you can afford. Should you use "virtual" staff? Ethical concerns. How to determine who manages the office and what compensation should be for employees and partners.
Susan M. Gerovasil, *Executive Director, Coplan & Crane Ltd.*
Adrian Mendoza, *Lillig & Thorsness Ltd.*

2:15 - 3:30 DOCUMENT MANAGEMENT AND DOCUMENT RETENTION POLICIES
What's the difference between the two? Also covered: going paperless, using a document management application, what's typically covered in each policy, and disaster preparation.
Bob Moss, *Law Practice Management Institute*

3:45 - 5:15 CAPITALIZATION
What are the financial risks of a new practice and how much money do you need? Learn how to obtain a loan in today's economic climate and whether you should use credit cards to finance your practice.
Stephen Ball, *mb Financial Bank*
Jason Bent, *Smith & Bent*
Nicole M. Waltz, *Waltz Palmer & Dawson LLC*

Special thanks to:
American Bar Association Young Lawyers Division
The Chicago Bar Association Young Lawyers Section

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-FRIDAY, JANUARY 15, 2010-

7:45 CONTINENTAL BREAKFAST

8:00 - 10:00 ACCOUNTING AND BILLING

Learn whether you need an EIN and how to obtain one. How to select a CPA as well as the right time and billing and accounting systems. Procedures for establishing an effective billing and collection process, handling IRS requirements, and creating and managing an IOLTA account will also be covered.

Gerri Martin, *CPA, MPM, Software Analysis Corporation*
Sherwin Brook, *CPA, Brook Weiner LLC*

10:15 - 12:15 CLIENT MANAGEMENT SYSTEMS

Why use a client management program and how to choose the one right for your practice area. Learn what must be covered in an fee agreement and the basics of a conflicts checks. Avoiding malpractice with the right calendar/docket program also will be covered.

Gerri Martin, *CPA, MPM, Software Analysis Corporation*

12:15 - 12:30 BOX LUNCH PICK-UP

12:30 - 1:45 TECHNOLOGY ENHANCED CLIENT COMMUNICATIONS

Discover how to create a better image for your firm and how to keep clients better informed using collaboration programs, electronic portfolios, digital signatures and certified e-mail.

Bryan Sims, *Thompson Rosenthal & Watts*

1:45 - 3:15 INSURANCE: WHAT YOU NEED AND HOW TO AVOID CLAIMS

In addition to malpractice coverage, what types of insurance do you need to protect yourself and your family? What is cyber-insurance? How do you develop necessary risk management policies?

Joseph Guerrero, *Sr. V.P., AON-Affinity Insurance*
Michael Smith, *Smith & Bent PC*

3:45-5:15 TECHNOLOGY CONSIDERATIONS

Our practice management expert will provide the tips and tricks in dealing with the practical concerns to be faced when choosing and installing technology in your new office. Security, backups, Mac or PC, and more.

Catherine Sanders Reach, *Director, ABA Legal Technology Resource Center*

All attendees will receive over 700 pages of materials geared to help you open your own practice!

-SATURDAY, JANUARY 16, 2010-

8:00 CONTINENTAL BREAKFAST

8:15 - 9:30 WHAT DO YOU NEED TO START? (Obtain Efficiency with a Limited Budget)

Discover what you need to open your doors – choosing software applications, hardware, phone systems, office supplies, and office equipment and furnishings.

Bob Moss, *Law Practice Management Institute*
Catherine Sanders Reach, *Director, ABA Legal Technology Resource Center*

9:45 - 11:15 MANAGING THE DATA OVERLOAD

How do you cope with all the data flowing in? Our speaker will provide ideas and demonstrations on how to effectively manage your email, how to set up an RSS feed aggregator to help you stay current, and discuss using electronic research notebooks. Also, tools for web clipping and monitoring and how to create personalized search engines will be covered.

Catherine Sanders Reach, *Director, ABA Legal Technology Resource Center*

11:20 - 1:05 MARKETING & NETWORKING

Learn key steps to developing your practice. Topics include: drafting a marketing plan, new practice announcements, soliciting business, using print ads, networking, Web sites, newsletters, podcasts, blogs and social media.

Nancy Roberts Linder, *Legal Marketing Consultant*
David A. Sorensen, *Hinshaw Culbertson LLP*

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CLE Registration

Opening a Law Firm

January 14-16, 2010

$175 CBA Member or American Bar Association Young Lawyers Division Member • $275 Nonmember • $150 CBA Government Member • $75 CLEAdvantage $50 CBA Law Student Member or Fall 2009 New Admittee Code (C37)**

Add $10 for Onsite Registration

HOW TO REGISTER:

- O Mail to: CBA Ticketing, 321 S. Plymouth Ct., Chicago, IL 60604
- O Fax to 312-554-2054
- O Online at www.chicagobar.org
- O Phone with credit card at 312-554-2056

Name

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❑ Yes, I want to order hardcopies of the seminar materials. **$50 per copy**.

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