



The State Bar of California

California Solo & Small Firm Summit

June 21 – 23, 2012
Renaissance Long Beach Hotel

The Summit is **THE** Event of the Year for California's Solo and Small Firm Practitioners and Office Staff! Expand Your **NETWORK** Knowledge and Skills, and **LEARN** Key Approaches to **BUILD** a Successful Client Referral Network. Take away Strategic **SOLUTIONS** for the Practice of Law and the **MANAGEMENT** of Your Legal Business. The Summit features **POWER** Networking Events, Legal **EDUCATION** Classes, Business Management Courses, and More—all Designed to Promote a **THRIVING** Law Practice. Plus, bring the family and enjoy nearby Disneyland!



Connections

www.calbar.org/solosummit



The State Bar of California

This is not your ordinary weekend CLE program!

Why You Should Join Us

The Summit content is geared to California attorneys who are in a solo or small firm practice. One low registration fee gives full choice among 30 workshops and programs, and much more!.

Earn up to 10 hours of MCLE credit

Get credit in *Legal Ethics, Elimination of Bias in the Legal Profession, and Detection/Prevention of Substance Abuse*. Select courses also offer legal specialization credit.

Enjoy 2 days continental breakfast and lunch, and Thursday welcome reception (included in registration fee).

Receive a USB drive containing a set of comprehensive materials providing up-to-date information on the new issues and trends in the law.

Visit with vendors exhibiting products and services tailored to Solo & Small Firm Practitioners.

Have your learning environment serve as the perfect summer getaway for you, your family and friends.

Register Online at www.calbar.org/solosummit

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The State Bar of California is a State Bar of California approved MCLE provider.

Come prepared to take away workable strategies to manage your office, build a client referral network, and stay on top of key developments in various substantive areas of law.

SCHEDULE AT A GLANCE

Thursday, June 21, 2012

11:30 am	General Session & Lunch
1:15 pm	Concurrent Workshops
5:00 pm	General Session & Daily Wrap-Up
6:00 pm	Vendor Reception
All Day	Exhibits Open

Friday, June 22, 2012

8:30 am	General Session & Continental Breakfast
9:45 am	Concurrent Workshops
11:00 am	General Session & Wrap-up
12:00 noon	Lunch Program
1:15 pm	Substantive Law Seminars
6:00 pm	End of Day — Evening on Your Own

Saturday, June 23, 2012

8:30 am	General Session & Continental Breakfast
9:45 am	Substantive Law Seminars
12:00 noon	End of Day — Time to Enjoy the Local Area

California Solo & Small Firm Summit Partners



WEST[®]

A Thomson Reuters business





Thursday, June 21, 2012
11:30 a.m. - 1:00 p.m.

(1) Opening General Session and Lunch

Building the “Lifestyle Law Firm”™: Lead Generation, Lead Conversion and Client Retention Strategies of Top Rainmakers

There are 3 key areas attorneys must focus on to build a “lifestyle law firm”: 1) lead generation— attracting more qualified clients; 2) lead conversation— converting more prospects into paying clients; and 3) client retention— doing excellent work so you can get repeat business and repeat referrals. This session will forever change the way you look at converting prospects into paying clients.



Stephen Fairley

MCLE: Not for MCLE Credit

Speaker: Stephen Fairley,
Rainmaker Institute

Thursday, June 21, 2012
1:15 p.m. - 2:15 p.m.

(2) Avoiding the State Bar Disciplinary System

An overview of the State Bar of California attorney disciplinary structure and common ethical violations. Take away key information to avoid getting caught up in the System.

MCLE: 1 Hour Legal Ethics

Speaker: Erin Joyce

(3) Ding! Thinking on Your Feet at Mediation

Using the tools from improvisational comedy, attendees will role-play two mediations and explore their creative side, and later discuss what worked and what didn't. Participants will leave this session

with the confidence to try 2 or 3 new approaches at their next mediation/negotiation.

MCLE: 1 Hour General

Speakers: Shairish Gupta, Avish Parashar

(4) The War Room: How to Thrive in the Trenches of Trial

Getting ready for trial can be a complex process, but putting your war room together doesn't have to be. Whether across town or across the country, every war room requires thoughtful planning. Get practical strategies, tips, and techniques on what it takes to create an effective war room, from inception to verdict so that you can get your case from the conference room to the courtroom and compete with any size firm anywhere.

MCLE: 1 Hour General

Speaker: Amie Bailey

Thursday, June 21, 2012
2:30 p.m. - 3:30 p.m.

(5) Health Care Reform: Small Employer Health Care Tax Credit

Learn the law and mechanics of the Health Care Reform Tax Credit for Small Employers – how it works, who is eligible, how to calculate the tax credit, and how to claim it.

MCLE: 1 Hour General

Speaker: Ruben D. Reyes

(6) Litigating From Your iPad Computer – Trial Strategies

Learn how to use your iPad to replace your litigation binder, your writing tablet, and your ball-point pen in trial.



MCLE: 1 Hour General

Speakers: B. Austin Baillio, John B. Marcin

(7) Basic Human Resource and Risk Management Principles for the Small Firm Practitioner

A review of the basic human resource and risk management principles relevant to the solo and small firm practitioner.

MCLE: 1 Hour General

Speaker: Robert Hawley

**Thursday, June 21, 2012
3:45 p.m. - 4:45 p.m.**

(8) Mandatory Fee Arbitration: The Good the Bad, and There Is No Ugly

An overview of the Mandatory Fee Arbitration program which offers attorneys and clients the opportunity to resolve their fee disputes both outside of the court system and the State Bar’s disciplinary system. Learn preventative tips to help avoid fee disputes.

MCLE: .5 General, .5 Legal Ethics

Speakers: Ken Bacon, Joel Mark, Malcolm Sher

(9) 24 Free Legal – Related Websites in 60 Minutes

Learn how to locate and use 24 free legal-related websites that help to streamline firm activities and conduct legal research. The instructor will identify productivity tools as well as alternatives to using (or having to pay for) legal research services..

MCLE: 1 Hour General

Speaker: Bret N. Christensen

(10) Emerging Practice Areas for New Lawyers

Environmental, healthcare, bankruptcy, energy, intellectual property, civil litigation, labor and employment law are the emerging areas of practice for new lawyers. This session will focus on building a specialty practice in one of these emerging areas.

MCLE: 1 Hour General

Speakers: Anne Adams, Patricia McCabe

**Thursday, June 21, 2012
5:00 p.m. - 6:00 p.m.**

(11) General Session and Wrap Up:

Secrets of Internet Marketing “They” Don’t Want You To Know: Search Engine Optimization for Attorneys

Over 95% of law firms have a website, yet most of them have never generated a significant amount of revenue from their website – in spite of spending substantial amounts on it! In this critical session you will discover the inside truth about search engine optimization, how to get your website on the 1st page of Google, and critical website conversion strategies.

MCLE: Not for MCLE Credit

Speaker: Stephen Fairley, Rainmaker Institute

**Thursday, June 21, 2012
6:00 p.m. - 7:00 p.m.**

(12) “Wine & Cheese” Reception

Connections – meet and learn from your peers during the Summit’s opening night networking event. Visit with vendors ready to showcase products and services geared especially for solo



and small firm practitioners. Serving wine and cheese to jump start your evening in Long Beach.

Friday, June 22, 2012
8:30 a.m. - 9:30 a.m.

(13) Continental Breakfast and General Session:

Law Firm Marketing Strategies in a Social Media World, Part 1: Connecting with Clients, Prospects and Referral Sources

Social media is one of the fastest growing areas where attorneys can generate high quality leads and build relationships with potential referral sources. Learn the “Rainmaker Social Media Blueprint” for connecting with clients, prospects and referral sources on LinkedIn, Facebook, and Twitter.

MCLE: Not for MCLE Credit

Speaker: Stephen Fairley, Rainmaker Institute

Friday, June 22, 2012
9:45 a.m. - 10:45 a.m.

(14) Client Trust Accounting Fundamentals

An overview of attorney’s client trust accounting responsibilities.

MCLE: 1 Hour Legal Ethics

Speaker: Kristin Ritsema

(15) The Business of Being An Employer- Critical Issues In Employment Law to Run a Solo or Small Firm Law Practice

Highlights key information on Human Resources issues to properly run a solo or small law firm practice – complying with the complexities of the

Labor Code, the Government Code, and related rules and regulations. The program covers the most common mistakes lawyers make as employers. Learn how to avoid liability in the area of wage and hour compliance, personnel management, and employment law compliance.

MCLE: 1 Hour General

Speaker: Cynthia Elkins

(16) They See You When You’re Sleeping: Attorney Privacy, Confidentiality & Security

A preview of “Growing and Maintaining Your Law Office”. Attendees will learn about ethical obligations to protect attorney-client privacy, confidentiality and security – both personally and via the smart-phones, computers & software they use daily.

MCLE: 1 Hour Legal Ethics

Speaker: Perry L. Segal

Friday, June 22, 2012
11:00 a.m. - 12:00 noon

(17) General Session and Wrap Up:

Law Firm Marketing Strategies in a Social Media World, Part 2: Using Video, Legal Directories, Landing Pages, and Blogs

In Part 2, Stephen will cover how attorneys are using video to convert more browsers into buyers, effective use of legal directories, why landing pages are critical to your success, and how to use your blog to drive leads and develop more business.

MCLE: Not for MCLE Credit

Speaker: Stephen Fairley, Rainmaker Institute



Friday, June 22, 2012
12:00 p.m. - 1:00 p.m.

(18) Friday Lunch Program: Fail Better: Continuing Efforts to Eliminate Bias in the Legal Profession

In this unique presentation, nationally-recognized humorist Sean Carter will discuss bias in the legal profession as it relates to race, gender, religion, disability and sexual orientation. Using witty one-liners and hilarious anecdotes, Mr. Carter will illustrate how even hidden and seemingly benign biases prevent lawyers from effectively representing clients and creating diverse and inclusive workplaces. And while these biases are somewhat unavoidable, it is possible for lawyers to “fail better” in a continuing effort to eliminate bias in the legal profession.



Sean Carter

MCLE: 1 Hour Elimination of Bias

Speaker: Sean Carter

Friday, June 22, 2011
1:15 p.m. - 2:15 p.m.

(19) Navigating Conflicts of Interest in Estate Planning and Administration

Estate planning attorneys must identify possible conflicts of interest in representing spouses, and multi-generational families. This presentation will review the Rules of Professional Conduct and types and requirements of waivers of conflict which may allow joint representation.

MCLE: 1 Hour Legal Ethics
Legal Specialization: 1 Hour Estate Planning, Trust and Probate Law

Speaker: Jennifer L. Wilkerson

(20) The Unique Challenges of Legal Practice

An examination of the stress, depression and substance abuse often experienced by legal professionals, and some of the resources available to address these problems.

MCLE: 1 Hour Detection, Prevention of Substance Abuse

Speaker: Alex Yufik

(21) Common Chapter 11 Issues in Smaller Cases

A discussion of the common issues in debtor and creditor representation, including the use of cash collateral, disclosures required for court approved employment, avoidance litigation, opposing plan confirmation, claim review and other subjects.

MCLE: 1 Hour General
Legal Specialization: 1 Hour Bankruptcy Law

Speakers: Van Durrer II, Elissa Miller

Friday, June 22, 2012
2:30 p.m. - 3:30 p.m.

(22) NO YOU DIDN'T! Recognizing the Difference Between a Mistake and Malpractice

We all worry about mistakes. And when a mistake is made by a lawyer, the first thing one thinks of is . . . malpractice. But we all make mistakes and most are not malpractice. Learn the difference. What are you ethically required to do, and how can you minimize your risk.

MCLE: 1 Hour Legal Ethics

Speaker: Nancy Goldstein



(23) Leveraging Technology to Beat the Big Guys in the Discovery Game

Covers the rules and new technologies pertaining to ESI (electronically stored information) that will level the playing field to allow a solo or small firm attorney to ‘go toe-to-toe’ with a large law firm throughout the discovery process – even during the most complex and voluminous litigation.

MCLE: 1 Hour General.

Speaker: Alexander H. Lubarsky

(24) What Every Practitioner Needs to Know about IRS and Practicing before the Tax Court

A discussion of the latest developments in estate and gift tax, including a review of important case law. Learn what the future holds for estate planners.

MCLE: 1 Hour General
Legal Specialization: 1 Hour Taxation Law; Estate Planning Trust and Probate Law

Speakers: Donna Herbert, Robin Klomparens

Friday, June 22, 2012
3:45 p.m. - 4:45 p.m.

(25) The Joys of Solo Appellate Practice

A panel of appellate specialists, civil and criminal, examines the joys and worries of solo practice. Topics include business models, alternative billing, technology and practice management, ethical pitfalls, and risk management. This presentation is aimed both at existing solo appellate practitioners and lawyers interested in this type of practice.

MCLE: 1 Hour of which .5 Hour Applies to Legal Ethics

Legal Specialization: 1 Hour Appellate Law

Speakers: Kathryn Davis, John Derrick

(26) Fresh Start—Tax Collection Tips for your Client in a Struggling Economy

An analysis of options a client has when faced with an outstanding tax liability and an inability to pay the liability. Addresses bankruptcy, offer in compromise, installment payment plan, application for discharge or subordination of a tax lien, and dissolution of entity.

MCLE: 1 Hour General
Legal Specialization: 1 Hour Taxation Law

Speaker: John A. Harbin

(27) 2012 Mid-Year Employment Law Update

An in-depth coverage of the most important employment law cases from late 2011 and all of 2012

MCLE: 1 Hour General

Speakers: Andrew H. Friedman,
Anthony J. Oncidi

Saturday, June 23, 2012
8:30 a.m. - 9:30 a.m.

(28) Continental Breakfast and Program: Time and Energy Management for the Busy Lawyer

Lawyers are more conscientious about recharging their cell phone battery than they are about recharging their own energy. Proactively managing both one’s energy and time is a great strategy for boosting productivity, minimizing stress, and avoiding derailment problems like burnout, substance abuse, addictive behaviors, and mental illness.



Andrew Elowitz

MCLE: Not for MCLE Credit

Speaker: Andrew Elowitz



Saturday, June 23, 2012
9:45 a.m. - 10:45 a.m.

(29) Malpractice and Ethics Exposures for Small Firms—Using Insurance to Mitigate Those Exposures

Learn how to use insurance to mitigate malpractice and ethical violations. Speakers will address key areas including exposure/types and frequency of claims, establishing risks/exposures, competence issues, conflicts of interest, drafting/errors of law, professional liability insurance, mandatory disclosure rules, and more.

MCLE: 1 Hour Legal Ethics

Speakers: Glen Olson, Wondie Russell, Jason Sommer

(30) Mediating the Employment Case

This program will feature prominent employment plaintiff and defense attorneys and a distinguished mediator, who will reveal their best strategies, tactics, and tricks for successfully resolving the employment lawsuit.

MCLE: 1 Hour General

Speakers: John Barber, Andrew Friedman, Steven Pearl

(31) Expedited Jury Trials – Are here to Stay — Are You Ready?

This presentation will demystify the Expedited Jury Trial Rules and explain how Expedited Jury Trials are done, what forms are available, how to craft EJT agreements, and how you and your clients can benefit from EJT. Receive key information on the current use of EJT and new and proposed Judicial Council forms.

MCLE: 1 Hour General

Speakers: Judge Michele E. Flurer; Judge Mary Thornton House

Saturday, June 23, 2012
11:00 a.m. - 12:00 noon

(32) Family Law Basics - From Initial Interview to Temporary Orders

A broad and pragmatic overview of family law, from the initial consultation to temporary orders. Topics include jurisdiction, venue, the initial paperwork, the importance of disclosure issues, and obtaining temporary orders. The program also will cover alternative methods of resolution, and address substantive issues including custody, visitation or time-share, support and property division.

MCLE: 1 Hour General
Legal Specialization: 1 Hour Family Law

Speaker: Sherry Peterson, Mark Ressa

(33) Survey of IP Developments for Non-IP Attorneys

An overview of issues in intellectual property (patent, trademark, copyright, trade secret), and a review of recent cases and laws, survey of common issues for transactional/administrative and litigating practitioners.

MCLE: 1 Hour General

Speaker: Glen Von Tersch

(34) Bankruptcy Schedules and Statements: Being Honest and Artful

Learn how to prepare schedules that fulfill the duties of debtor and counsel. Key questions and topics will be presented. Learn how to construct schedules that optimize success in exemption planning, discharge and trustee interaction.

MCLE: 1 Hour General
Legal Specialization: 1 Hour Bankruptcy

Speakers: Iain Macdonald, Michael O'Halloran, Larry Simon



COURSE SELECTOR

Your Name _____ Your Bar Number _____

Use this form to select the events and education courses that you plan to attend. Keep a copy for your records.

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11:30 a.m.-1:00 p.m.

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1:15 p.m.-2:15 p.m.

- [2] Avoiding the State Bar Disciplinary System
- [3] Ding! Thinking on Your Feet at Mediation
- [4] The War Room: How to Thrive in the Trenches of Trial

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- [5] Health Care Reform: Small Employer Health Care Tax Credit
- [6] Litigating from Your iPad Computer – Trial Strategies
- [7] Basic Human Resource and Risk Management Principles for the Small Firm Practitioner

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- [9] 24 Free Legal - Related Websites in 60 Minutes
- [10] Emerging Practice Areas for New Lawyers

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9:45 a.m.-10:45 a.m.

- [14] Client Trust Accounting Fundamentals
- [15] The Business of Being An Employer- Critical Issues In Employment Law to Run a solo or small Firm Law Practice
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- [20] The Unique Challenges of Legal Practice
- [21] Common Chapter 11 Issues in Smaller Cases

2:30 p.m.-3:30 p.m.

- [22] NO YOU DIDN’T! Recognizing the Difference Between a Mistake and Malpractice
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- [24] What Every Practitioner Needs to Know about IRS and Practicing before the Tax Court

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- [25] The Joys of Solo Appellate Practice
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- [30] Mediating the Employment Case
- [31] Expedited Jury Trials – Are Here to Stay – Are You Ready?

11:00 a.m.-12:00 noon

- [32] Family Law Basics - From Initial Interview to Temporary Order
- [33] Survey of IP Developments for Non-IP Attorneys
- [34] Bankruptcy Schedules and Statements: Being Honest and Artful



REGISTRATION FORM

USE A SEPARATE FORM FOR EACH REGISTRANT

DEADLINE: JUNE 14, 2012

For advance registration, complete this Registration Form and the Course Selector on the reverse side. Keep a photocopy for your records and mail or fax this form before the June 14 deadline.

SIGN ME UP!

REGISTER

For registration information call (415) 563-2508.

ONLINE AT: www.calbar.org/solosummit

BY FAX: (415) 538-2368
Registrations with credit card payments only. If advance registration form is faxed, do not mail the original form. Fax registrations cannot be confirmed by telephone, but you will receive an email confirmation.

BY MAIL: Program Registrations/Solo Summit
State Bar of California
180 Howard Street, San Francisco CA 94105



Special Needs or Assistance Call (415) 538-2465

CA State Bar Number _____

Email (required) _____

Name _____

Firm _____

Address _____

City/State/Zip _____

Phone _____

Non-Lawyer Spouse/Guest Name _____

If your spouse/guest is not an attorney, registration is complimentary. If your spouse/guest is an attorney he or she must complete a separate form and pay the registration fee.

Your contact information may be released to other attendees/sponsors/exhibitors. Check here if you do not want your contact information released.

GROUP DISCOUNT

SAVE when you send multiple staff from the same office. Register two or more people and receive \$25 off the pre-registration fee for each registrant. Everyone in the "group" must register at the same time to qualify. Call (415) 538-2508 for further information. Not available for online registration.

REGISTRATION FEE

Registration fee includes admission to education programs, program materials, continental breakfast (Friday/Saturday) and lunch* (Thursday/Friday). *Meal substitutions may not be available.

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	Registration Fee if Received by June 14	Fee if Received After June 14 and On-site
<input type="checkbox"/> Attorney	\$375	\$475
<input type="checkbox"/> Paralegal and other non-attorney legal professional	\$300	\$400

REGISTRATION PAYMENT

Registration fees may be paid by check, VISA or MasterCard (no other credit cards will be accepted.) Make checks payable to The State Bar of California.

Total Amount Enclosed or to be Charged for Registration Fees \$ _____

My check is enclosed OR Charge my VISA or MasterCard

Select one VISA MasterCard

Account Number _____

Exp Date _____

Cardholder's Name _____

Cardholder's Signature _____

REFUNDS/CANCELLATIONS

Registration and/or ticket refund requests MUST BE IN WRITING AND BE RECEIVED BY THE STATE BAR by June 14, 2012, and are subject to a \$50 service charge.

Refunds are not available after June 14.



GENERAL INFORMATION/HOTEL RESERVATIONS

Long Beach is a convenient destination for the 2012 California Solo & Small Firm Summit. We can plan an exceptional educational program for you in a destination with many fun, local attractions for the family and friends who may be joining you.

KEY DEADLINES

May 29 Hotel Reservation Deadline

June 14 Pre-registration Deadline

GETTING THERE AND PARKING

The Marriott Renaissance Long Beach Hotel is located in the heart of Long Beach, on the corner of Pine Avenue and Ocean Boulevard. Situated in the entertainment district, it is steps away from great dining, nightlife and boutique shopping. Nearby airports are Long Beach Airport and Los Angeles International Airport.

- The Long Beach Airport (LGB) –11 miles from the hotel. Transportation options include Super Shuttle (approx. \$18 each way, reservation required) or Taxi (approx. \$23 each way).
- Los Angeles International Airport (LAX) – 24 miles from the hotel. Transportation options include Super Shuttle (approx. \$17 each way, reservation required) or Taxi (approx. \$70 each way).

Parking at the Marriott Renaissance Long Beach Hotel is available at a daily fee of \$16 for self-parking or \$20 for valet parking.

REGISTRATION/PROGRAM & SPEAKER CHANGES

Deadline: June 14, 2012

Advance registration deadline is June 14, 2012. Registration fees are outlined on the form. Register online at www.calbar.ca.gov/solosummit. Registration and/or ticket refund requests must be in writing and received by June 14, 2012, and are subject to a \$50 service charge. Occasionally changes in the programs are made in response to speaker availability, participant demand or unforeseen circumstances.

QUESTIONS

For registration information please call (415) 538-2508. For program content information or Special Assistance call (415) 538-2467.

HOTEL INFORMATION

Deadline: May 29, 2012

Only \$169 plus tax, per night
Help us keep the Summit registration fees low, by booking your hotel reservation at our headquarter property hotel.

**Marriott Renaissance
Long Beach Hotel**

**111 East Ocean Boulevard,
Long Beach 90802
(562) 437-5900**

A block of rooms has been reserved at the Marriott Renaissance Long Beach Hotel at the special Summit rate of \$169 single or double occupancy. **Reservations must be made by May 29.** Don't wait to book your reservations as the hotel block may sell out before the May 26 deadline. **Book your reservations by calling (800) 468-3571 or the hotel directly at (562) 437-5900.** Mention State Bar of California Solo & Small Firm Summit to get the group rate.

The Marriott Renaissance is a pet-friendly hotel. There is a non-refundable sanitation fee of \$75. Contact the Marriott for details.





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San Francisco CA 94105-1639

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June 21 – 23, 2012
Renaissance Long Beach Hotel

JOIN US FOR
the annual 2-day educational summit designed for
solo or small firm practitioners and office staff,
with solutions for lawyering and managing a law practice.
Features technology lab, Ethics hotline live “by satellite”
and CLE programs in substantive areas most common to
solo or small firm practitioners –
ALL DESIGNED BY THE STATE BAR OF CALIFORNIA.

