



# SOLO & SMALL FIRM CONFERENCE

October 26-28, 2017

Kalahari Resort, Wisconsin Dells

EARN UP TO **15.5** CREDITS - INCLUDING **9.5** EPR, **3.5** LAU, and **6.0** LPM CREDITS



## Get even more for your practice and your life

This year, it's all about giving you more – more CLE choices, more resources, more time to network, more fun, and more of the hottest legal trends. Earn up to 15.5 credits, including 9.5 EPR, 3.5 LAU, and 6.0 LPM credits while getting the latest tools and techniques for a successful practice.

Whether you're looking for information about improving your law practice, need guidance on managing your business, or are ready to kick back and enjoy life, the *2017 Wisconsin Solo & Small Firm Conference* has something for you!



## Join the conversation

In 2017, you can start networking even *before* you get to the *Conference* and continue long after you head home. Connect with colleagues in our LinkedIn group exclusively for *Conference* attendees. Make plans to meet up in person in Wisconsin Dells, share perspectives on various session topics, or pose a question to the group. Find the group at [wssf.org/linkedin](http://wssf.org/linkedin).



## Networking lunch and Lederer Award presentation

Don't miss one of the highlights of the *Conference* - the presentation of the 2017 Lederer Award. Named in memory of attorney John Lederer, the award is presented annually to an individual, group, or organization exemplifying his leadership, spirit, and dedication. Lederer saw it as his mission to help solo and small firm lawyers master the skills and technology needed to build their practices. He was also instrumental in creating the *Wisconsin Solo & Small Firm Conference*.



## Plenaries packed with tools and tips

Seven incredible plenaries pull everyone together to learn about staying safe in the 21st century; recharging & refueling to be your best; the latest technology trends; and what Hollywood can teach us about ethics. See page 3 for details.

### Don't Be a Target:

- Cybersecurity
- The Ethics of Cybersecurity and "Reasonable Measures" Requirement
- Workplace Security
- Practical Tips for Security in a Law Office
- Work Smarter: The Power of Recharge
- Gadgets, Gizmos, and Widgets
- Lessons from Hollywood: Legal Comedies Offer Help for Your Practice



## Evening entertainment

Enjoy complimentary hors d'oeuvres, beer, wine, and soda, plus a cash bar at the Attendee Reception on **Thursday** evening. Don't forget to stop in at the hospitality suite on **Friday** evening of the *Conference* for complimentary wine, beer, and refreshments.



## Catch sessions you miss with webcast replays

Can't make it to all the sessions you want? Relax. We'll be recording select sessions and providing them via webcast after the *Conference*. Replays will be offered in November and December, and attendees can watch any or all of the sessions on these days for FREE.

## Register today!

Visit [www.wssf.org](http://www.wssf.org) or call (800) 728-7788 to register or for more information.

## Location

**Kalahari Resort & Convention Center**  
1305 Kalahari Drive  
Wisconsin Dells, WI 53965  
www.kalahariresorts.com/wi  
(877) 253-5466



## Lodging

WSSFC attendees can receive special room rates at the Kalahari Resort when reservations are made **before September 25, 2017**.

Standard room rates are \$112 per night plus tax for Wednesday, \$129 plus tax for Thursday and Friday, and \$149 plus tax for Saturday night. All rooms include waterpark passes for 4 people. If you would like to extend your stay, contact the Kalahari to check on discounted rates before and after the *Conference*. Other special rates are available. Visit [wssfc.org](http://wssfc.org) to see all available rates.

**To reserve your room, call (877) 253-5466 by September 25, 2017 to receive the discounted rate!** Please mention that you are with the *Wisconsin Solo & Small Firm Conference*.

## Registration

**Online:** [www.wssfc.org/register](http://www.wssfc.org/register)  
(credit card or Ultimate Pass only)

**Phone:** (800) 728-7788  
(credit card or Ultimate Pass only)

**Fax:** (608) 250-6020  
(credit card or Ultimate Pass only)

**Mail:** State Bar PINNACLE Registrations  
P.O. Box 7158  
Madison, WI 53707-7158  
(check, credit card, passbooks, or Ultimate Pass)

## Cancellations

Registration cancellations received by 4:30 p.m. CT on October 13, 2017 will receive a full registration fee refund. **We're sorry, no refunds will be granted after that date.** However, you may transfer the full value of the registration fee you paid to another person's registration for this event.

## Special Needs/Accommodations

If you need special accommodations, please contact us at (800) 728-7788, ext. 6157 at least three weeks prior to the *Conference* so we can make appropriate arrangements.

## About CLE Credit

The *Conference* will be submitted for CLE credit to the Wisconsin & Minnesota Board of Bar Examiners. For applicable programs, Ethics/Professional Responsibility (EPR) credits also will be submitted for approval. Only individuals registering as State Bar of Wisconsin members will be recorded for CLE credits. For complete details on credit types and amounts see [wssfc.org/faq](http://wssfc.org/faq)



### EARN EVEN MORE CREDITS!

Select sessions of the *Conference* will be recorded and webcast at future dates. All *Conference* attendees may view select dates **FOR FREE!**

**Notice to all registrants, instructors, exhibitors, and guests:** By attending this State Bar event, you understand and agree that you may be photographed and/or electronically recorded during the event and you hereby grant to the State Bar the right to use and distribute your name and likeness for promotional or educational purposes without monetary compensation. The State Bar assumes no liability for such use.



### GET SOCIAL

Join our LinkedIn group exclusively for attendees! [wssfc.org/linkedin](http://wssfc.org/linkedin)

# 13TH ANNUAL WISCONSIN SOLO & SMALL FIRM CONFERENCE

**Oct. 26-28, 2017**  
**KALAHARI RESORT,  
WISCONSIN DELLS**

## REGISTRATION FORM Please print or type.

Use this form, visit [wssfc.org](http://wssfc.org), or call (800) 728-7788 to register.

Name \_\_\_\_\_  
State Bar No. \_\_\_\_\_  
Organization \_\_\_\_\_  
Email address \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_  
State \_\_\_\_\_  
Zip \_\_\_\_\_  
Phone \_\_\_\_\_  
Fax \_\_\_\_\_

Wisconsin Solo and Small Firm Conference Tuition	EARLY REGISTRATION <u>BY</u> October 4	STANDARD REGISTRATION <u>AFTER</u> October 4
<b>SBW Members*</b>	\$299	add \$50
<b>Nonmembers*</b>	\$399	add \$50
<b>Ultimate Pass Gold</b>	\$0	\$0

Ultimate Pass Silver receives 50% discount off member tuition rate. U/P Silver not eligible for first time attendee discount.

WALA members and staff of State Bar Members receive SBW member pricing.

Please indicate whether you will attend the complimentary Thursday and Friday luncheons when registering.

- \_\_\_\_\_ Attend Thursday lunch in the Expo Hall included for all registrants - \$0.  
\_\_\_\_\_ Attend Friday networking lunch and Lederer Award included with paid registrations - \$0. (Ultimate Pass Gold and Law Students, **add \$20**)

**TOTAL ENCLOSED \$** \_\_\_\_\_

- Check Enclosed (payable to State Bar PINNACLE)  
 Ultimate Pass Subscriber  
 MasterCard     VISA     AMEX

Account # \_\_\_\_\_

Signature \_\_\_\_\_

Exp. Date \_\_\_\_\_

**PRIORITY CODE: IN791-2017**

## Plenary sessions

### DON'T BE A TARGET: CYBERSECURITY

#### Thursday, 9:00 - 9:50 a.m. (1.0 LPM Credit)

Ransomware, phishing, hacks via social media, and other data breaches are expensive cybersecurity lessons for solo practices and small firms. Understand what it takes to defend your firm from cyber threats. Watch live as our “cybercriminal” hacks into a computer network and demonstrates common vulnerabilities.

He will demonstrate Cybersecurity risks for solo and small firm practitioners. Empower yourself by learning basic security hygiene (it's easy! We promise!) that you can start utilizing right away.

- Watch him get into a locked Windows machine in 30 seconds
- See how an eight-character password can be cracked in less than 10 minutes

*Joseph Granneman, CEO & Principal, Illumination.io, Rockford*

### DON'T BE A TARGET: THE ETHICS OF CYBERSECURITY AND “REASONABLE MEASURES” REQUIREMENT

#### Thursday, 10:00 - 10:50 p.m. (1.0 CLE/EPR Credit)

The WannaCry ransomware attack infected over 200,000 computers in 150 countries in just 24 hours. Just one month later, the DLA Piper Law Firm - which had touted its cybersecurity expertise in the wake of WannaCry - was hit with a ransomware attack called Petrwrap/Petya. No one can guarantee they'll never have a security breach. However, lawyers have an ethical duty to protect client data from cyber attack. You're required to use reasonable measures to protect that information from unauthorized or inadvertent disclosure.

A panel of technology and ethics specialists will help you understand what “reasonable measures” look like. Plus, learn about techniques and tools you can use to prevent cyber attacks and protect your practice's data.

*Moderator: Thomas J. Watson, Wisconsin Lawyers Mutual Insurance Co., Madison; Panelists: Joseph Granneman, Illumination.io, Rockford; Aviva M. Kaiser, State Bar of Wisconsin, Madison; Thomas R. Schumacher, Bakke Norman, S.C., New Richmond*

### DON'T BE A TARGET: WORKPLACE SECURITY

#### Thursday, 11:00 - 11:50 a.m. (No Credit)

How can you keep yourself, your employees, and your clients safe from a workplace intruder? Should you shelter in place or run? City of Madison police officers will show you CRASE - Civilian Response to Active Shooter Events - a proven, nationally-recognized model for when the unthinkable occurs.

- Know how to react to the threat of physical danger in your office
- Find out what police officers wish everyone knew about active shooter situations
- Analyze lessons learned from the Virginia Tech shooting and others
- Discover how human psychology and high stress levels impact our responses and our ability to formulate plans in the moment
- Understand the importance of having an emergency plan for your firm

*Sgt. Shawn Engel, City of Madison Police Department, Madison; Lt. June Groehler, City of Madison Police Department, Madison*

### DON'T BE A TARGET: PRACTICAL TIPS FOR SECURITY IN A LAW OFFICE

#### Thursday, 1:00 - 2:15 p.m. (1.5 LPM Credit)

Whether you work in an office or from home, make safety a priority. Unfortunately, clients are one of the biggest threats to lawyers and their offices, but it doesn't stop there. Opposing parties, employees and their estranged spouses, and even the public at large can all cause concerns. Join us for a candid conversation with attorneys and security experts on how to integrate protective measures into your law practice and handle potentially dangerous situations.

**Learn how to handle cases involving volatile people, including:**

- Tips for screening clients
- Best practices for meeting with clients and other parties - especially if you practice out of your home
- Appropriate actions to take when a client's conduct is creepy, but not necessarily illegal
- Reporting a client or former client to law enforcement concerning conduct or communications while maintaining your duty of confidentiality
- What to tell the judge if you need to discontinue representing a client

**In addition, explore questions such as:**

- What steps should you take to maintain your privacy?
- How should you manage threats from the public in high-profile cases?
- What can you do if you suspect you're being stalked?

*Daniel P. Bestul, Duxstad & Bestul, S.C., Monroe; Josh Manning, Integrated Security Solutions, Cottage Grove; Sgt. Shawn Engel, City of Madison Police Department, Madison; Jessa Nicholson Goetz, Nicholson, Gansner & Otis, S.C., Madison; Thomas J. Watson, Wisconsin Lawyers Mutual Insurance Co., Madison*



## Save Big on Tuition Fees!

**Register by Wednesday, October 4th to save up to \$50 or become an Ultimate Pass Gold subscriber and get tuition for FREE!** Visit [wisbar.org/ultimatepass](http://wisbar.org/ultimatepass) to learn more about the Ultimate Pass Gold or the Ultimate Pass Silver, which earns you 50% off of tuition.

### WORK SMARTER: THE POWER OF RECHARGE

#### Friday, 9:00 - 10:30 a.m. (1.5 LAU Credit)

Want to feel better, perform better, and banish burnout? If you're ready to accomplish more high-quality work in less time, this session is for you! Recharging techniques, coupled with strategies for working smarter, increase your overall well-being for a more fulfilling and sustainable career.

Hallie Love, founder of Positive Psychology for Lawyers and specialist in the synthesis of neuroscience, positive psychology, mindfulness, and mind-body techniques, trains attorneys in the benefits of incorporating recharge techniques into legal practice to increase positivity and decrease stress, anxiety, and depression.

Experience these benefits firsthand as Hallie guides you through various mind-body recharge techniques. See how doing these simple exercises at strategic times throughout the day can leave you feeling refreshed and revitalized.

#### The Benefits of Recharging

- More time spent in “peak productive performance” mode
- Superior professionalism and ethical decision-making
- Enhanced quality of life
- Improved emotional intelligence and resilience
- Heightened focus
- More energy
- Increased motivation
- Higher confidence levels

Yes, you can be more productive at work even in high-stress conditions. Hallie's work smarter approach is based on research in attention, positive psychology, sleep, health, and the mind-body connection.

*Hallie Love, Positive Psychology for Lawyers, Santa Fe, NM*

### GADGETS, GIZMOS, AND WIDGETS

#### Saturday, 7:30 - 8:20 a.m. (1.0 LPM Credit)

Back by popular demand! This fast-paced *Conference* favorite will bring a smile to your face with a look at the lighter side of technology. Find tips for getting more from the gizmos and gadgets that are most useful to your law practice and your life.

Discover why conference attendees get up early to grab a seat at this session. Plus, treat yourself to something special from our gourmet coffee bar before things get started.

*Nerino J. Petro, Jr., The Erickson Group, Belvidere, IL*

*Bryan Sims, Sims Law Firm Ltd, Naperville, IL*

### LESSONS FROM HOLLYWOOD: LEGAL COMEDIES OFFER HELP FOR YOUR PRACTICE

#### Saturday, 10:50 a.m. - 12:15 p.m. (1.5 CLE/EPR Credits)

Since the public tends to distrust lawyers and the legal system, we shouldn't be surprised to see attorneys as targets of satire in the movies. Have you ever wondered why audiences like to laugh at lawyers and the courts? What we can learn from our cohorts on the silver screen?

Because movie directors and producers have no particular knowledge of professional conduct rules, the ways lawyers are portrayed in movies usually involve actions that wouldn't be acceptable under the rules. No wonder both the public and real life attorneys have reservations about how lawyers conduct themselves on film!

In this session, dig deeper into a selection of comedies featuring lawyers. Identify how the lawyer's conduct violated a specific rule, and learn how that conduct underscores issues that surface when applying the rule in question.

*David Papke, Marquette University Law School, Milwaukee*

## Thursday Evening Reception in the Legal Expo

On Thursday evening, unwind from a busy day and start making new connections while enjoying beer, wine, soda, hors d'oeuvres, and a cash bar from 5:00 - 6:30 p.m., sponsored by WILMIC and West Bend Mutual Insurance Company.

## Hospitality Suite

On Friday evening, join your colleagues in the Hospitality Suite for wine, beer, and refreshments. Sponsored by Krekeler Strother, S.C. and Smith Keane LLP

Thursday Schedule	Substantive Track	Practice Management Track	Technology Track Sponsored by Spindletop Investigations and Bakke Norman, S.C.	Quality of Life/Ethics Track
8:00 - 9:00 a.m.	Conference Registration, Continental Breakfast compliments of Hupy and Abraham, S.C.			
9:00 - 9:50 a.m.	Opening Plenary: Don't Be a Target – Cybersecurity - <i>Joseph Granneman (1.0 LPM)</i>			
10:00 – 10:50 a.m.	Plenary: Don't Be a Target: The Ethics of Cybersecurity and 'Reasonable Measures' Requirement - <i>Joseph Granneman, Aviva M. Kaiser, Thomas R. Schumacher, Thomas J. Watson (1.0 CLE/EPR)</i>			
11:00 – 11:50 a.m.	Plenary: Don't Be a Target: Workplace Security - <i>Sgt. Shawn Engel, Madison Police Department, Madison (No credit)</i>			
11:50 – 1:00 p.m.	Lunch in the Expo Hall, sponsored by Habush, Habush & Rottier – open to all registrants			
1:00 – 2:15 p.m.	Plenary: Don't Be a Target: Practical Tips for Security in a Law Office - <i>Daniel P. Bestul, Richard Castner, Sgt. Shawn Engel, Jessa Nicholson Goetz (1.5 LPM)</i>			
2:15– 2:45 p.m.	Refreshment Break - Visit the Legal Expo and get your passport signed to be entered to win great prizes!			
Session 1 2:45 - 3:35 p.m.	Mediation in Estates, Guardianships, and Elder Law Matters (1.0 CLE)	More Than a Handshake: Effective Networking (No Credit)	Supercharged Legal research with Fastcase (1.0 LPM)	An Ethics "Fee for All" (1.0 CLE / EPR)
3:55 - 4:05 p.m.	Refreshment Break - Visit the Legal Expo and get your passport signed to be entered to win great prizes!			
Session 2 4:05 - 4:55 p.m.	Attorney-Mediators as Drafters: Understanding the New Rule (1.0 CLE/ EPR)	Mayday! Mayday! Lessons Learned from Setting Up Shop (1.0 LPM)	Tools for Your PDF/Paperless Office (1.0 LPM)	Cyberliability and the Payment Card Industry (1.0 LPM)
4:55- 6:30 p.m.	Attendee Reception in the Legal Expo - Enjoy beer, wine and soda, plus a cash bar and hors d'oeuvres compliments of WILMIC and West Bend Mutual Insurance Company.			
6:30 p.m.	Dine-Arounds			

Friday Schedule	Substantive Track	Practice Management Track	Technology Track Sponsored by Spindletop Investigations and Bakke Norman, S.C.	Quality of Life/Ethics Track
7:45 a.m. - 10:50 a.m.	Legal Expo Is Open - Today is your last chance to meet with companies that can help your practice.			
7:45 - 8:30 a.m.	Registration and Deluxe Continental Breakfast compliments of Hupy and Abraham, S.C.			
9:00 - 10:30 a.m.	Plenary: Work Smarter: The Power of Recharge, <i>Hallie Love (1.5 LAU)</i>			
10:30 - 11:00 a.m.	Refreshment Break - Last chance to visit the Legal Expo and get your passport signed to be entered to win great prizes!			
Session 3 11:00 - 11:50 a.m.	Understanding Special Needs Trusts (1.0 CLE)	Leadership for Lawyers (1.0 LPM)	Getting Work Done With Your iPad (1.0 LPM)	Pro Bono Work is a Professional Obligation (1.0 CLE / EPR)
11:20 a.m. - 1:15 p.m.	Networking Lunch and Lederer Award (No CLE credit)			
1:15 - 1:30 p.m.	Refreshment Break - Feeling lucky? Passport to prizes and exhibitor drawing winners will be announced.			
Session 4 1:40 - 2:30 p.m.	Agricultural Reorganizations, Simplified for General Consumption (1.0 CLE)	In Social Media, "E" is for Ethics (1.0 CLE/EPR)	Getting the Most from Outlook (1.0 LPM)	Positive Psychology for Lawyers: Tools for Quality of Life (1.0 LAU)
Session 5 2:50 - 3:40 p.m.	Real Estate Essentials for Every Practice (1.0 CLE)	Method to the Madness: Building Processes into Your Law Firm (1.0 LPM)	Protecting Your Digital A\$\$ets (1.0 LPM)	Breaking Up is Hard to Do: Severing the Lawyer-Client Relationship (1.0 CLE/EPR)
Session 6 4:00 - 4:50 p.m.	Proportionality and Digital Evidence: Maximum Results on a Minimum Budget (1.0 CLE)	Everyone Has a Story to Tell: Here's How to Tell Yours (1.0 CLE)	50 Tips in 50 Minutes (1.0 LPM)	Diminished Capacity in the Elderly or Declining Client (1.0 CLE/EPR)
5:00 - 6:30 p.m.	Hospitality Suite - Enjoy wine and refreshments sponsored by Krekeler Strother S.C. and Smith Keane LLP (Dinner on your own.)			

Saturday Schedule	Substantive Track	Practice Management Track	Technology Track Sponsored by Spindletop Investigations and Bakke Norman, S.C.	Quality of Life/Ethics Track
7:00 - 7:30 a.m.	Registration, Deluxe Continental Breakfast, and Gourmet Coffee Bar - compliments of Hupy and Abraham, S.C.			
7:30 - 8:20 a.m.	Plenary: Gadgets, Gizmos, and Widgets - <i>Nerino J. Petro, Jr., Bryan Sims (1.0 LPM)</i>			
Session 7 8:30 - 9:20 a.m.	Immigration Law for the Rest of Us (1.0 CLE)	Ten Lessons for More Effective Legal Writing (1.0 CLE)	Wonder Word Powers Activate! (1.0 LPM)	Flying Solo and Enjoying the Ride (1.0 LAU)
9:20 - 9:50 a.m.	Break/Hotel check-out			
Session 8 9:50 - 10:40 a.m.	Exactly Who Can (Legally) Own a Gun, Anyway? (1.0 CLE)	Getting to Yes: Secrets to Successful Negotiation (1.0 CLE)	Take Me to the Cloud (1.0 LPM)	The Legal Industry of Tomorrow Arrived Yesterday (1.0 CLE / EPR)
10:50 a.m. - 12:15 p.m.	Closing Plenary: Lessons From Hollywood: Legal Comedies Offer Help for Your Practice - <i>David Papke (1.5 CLE / EPR)</i>			
12:15 p.m.	Conference concludes			

**Refreshment Breaks** - Visit the Legal Expo to recharge between sessions and get your "Passport to Prizes" signed by exhibitors for a chance to win great prizes! Learn the latest on products and services designed to enhance your practice.

## Program Descriptions

### SUBSTANTIVE TRACK

**Session 1 Thursday 2:45-3:35 p.m. 1.0 CLE Credit**

#### Mediation in Estates, Guardianships, and Elder Law Matters

As people age, conflicts often erupt over property transfers, estate planning, powers of attorney, guardianships, and who's paying for what type of care. Discover how you can employ mediation effectively in these sorts of conflicts. In addition, learn a dispute resolution model used nationwide to generate optimal outcomes for clients.

*Rachel Monaco-Wilcox, Rachel Monaco-Wilcox LLC, Richfield*

**Session 2 Thursday 4:05-4:55 p.m. 1.0 CLE/EPR Credit**

#### Attorneys-Mediators as Drafters: Understanding the New Rule

The new Wisconsin Supreme Court rule permitting lawyer-mediators to draft legal documents has opened the door for increased mediation in family court cases. A panel of court commissioners, experienced attorney-mediators, and an ethics specialist will discuss and distill the benefits of mediation as well as pitfalls to navigate and avoid. Leave this session more confident regarding:

- Mediating pro se parties
- Knowing and respecting your own limitations
- Informed consent
- Basic fee and mediation agreements
- Application and availability of non-legal resources for pro se parties

*Moderator: Kate Knowlton, Knowlton Law Group LLC, Wauwatosa; Panelists: Hon. Dolores A. Bomrad, Washington County Circuit Court, West Bend; Timothy J. Pierce, State Bar of Wisconsin, Madison; Lauri Roman, Haus, Roman and Banks LLP, Madison; Hon. Katherine M. Stewart, Circuit Court Commissioner, Washburn and Barron Counties, Spooner*

**Session 3 Friday 11:00-11:50 a.m. 1.0 CLE Credit**

#### Understanding Special Needs Trusts

Do you know what a special needs trust is and when it's appropriate for a client? Special needs trusts are a key aspect of estate planning, personal injury, and family law practices. Explore the different types of special needs trusts, including:

- Third-party
- Self-settled
- Pooled

Learn how to spot situations where these trusts could be an option, or even a necessity, for your clients. Hear advice on counseling your clients about the realities of how a special needs trust operates. Plus, understand how clients can use a special needs trust to supplement their own needs or provide for a loved one's long-term needs that public benefits will not meet.

*Meghan M. Teigen, Christenson Johnson LLC, Madison*

**Session 4 Friday 1:40-2:30 p.m. 1.0 CLE Credit**

#### Agricultural Reorganizations, Simplified for General Consumption

Wisconsin's ideal climate, natural resources, agribusiness infrastructure, and farming heritage have made it one of the top ten agricultural states in the U.S. But years of depressed commodity prices and adverse weather are making it difficult for Wisconsin producers to pay their bills and keep their operations going.

Attend this session to learn:

- Available reorganization options under Chapters 11, 12, and 13 of the Bankruptcy Code and filing mechanics for each
- Tips for choosing the reorganization chapter that's right for your client, including addressing eligibility, pros and cons, and related costs
- Information on secured and unsecured creditors' rights in agricultural reorganizations
- Tools for effective negotiations with secured and unsecured creditors for loan workouts

*J. David Krekeler, Krekeler Strother, S.C., Madison; Eliza M. Reyes, Krekeler Strother, S.C., Madison*

**Session 5 Friday 2:50-3:40 p.m. 1.0 CLE Credit**

#### Real Estate Essentials for Every Practice

Even if you don't specialize in real estate law, chances are you'll run into property issues in your cases. If you practice in family law, estate planning, probate, criminal law, post-judgment litigation, or fair housing, this session is for you.

- Family law - hear how to handle the family home when the family is splitting up
- Estate planning - take away tips for trouble-free transfers of title
- Probate - bolster your ability to divvy up dirt to devisees
- And much more!

*Sara B. Andrew, Andrew Law Offices, S.C., Fond du Lac; Carol E. Krigbaum, Krigbaum Law LLC, Milwaukee*

**Session 6 Friday 4:00-4:50 p.m. 1.0 CLE Credit**

#### Proportionality and Digital Evidence: Maximum Results on a Minimum Budget

Digital evidence and e-discovery issues can arise in any case - and not all of them are straightforward. Whether you're still learning the ins and outs of technology or are already comfortable with it, this session will show you practical strategies for:

- Maximizing digital evidence use
- Avoiding expensive consequences of improperly conducted e-discovery

*Matthew J. Stippich, Digital Intelligence, New Berlin*

**Session 7 Saturday 8:30-9:20 a.m. 1.0 CLE Credit**

#### Immigration Law for the Rest of Us

Learn how to avoid inadvertently getting your client deported. Negotiating for a client in criminal court or representing a client in a divorce can have different outcomes depending on his or her immigration status.

Experienced immigration attorneys will discuss the impact of immigration status in family law, criminal law, employment law, and other disciplines. In addition, explore the possibility of mandatory E-Verify and learn why many migrant workers can't obtain work visas.

*Teddy Chadwick, Grzeca Law Group, S.C., Milwaukee; Carrie M. Ziegler Thomas, Grzeca Law Group, S.C., Milwaukee*

**Session 8 Saturday 9:50-10:40 a.m. 1.0 CLE Credit**

#### Exactly Who Can (Legally) Own a Gun, Anyway?

If you've ever wondered how the latest shooter on the news acquired a gun or had clients ask how to keep their hunting rights in the face of a criminal conviction, this session is for you.

- See how state, federal, and constitutional laws dictate who can legally own a gun in Wisconsin
- Examine ways state and federal laws overlap and sometimes contradict one another
- Find out how gun ownership is assessed for felons, those under indictment for felony, and those found guilty of some misdemeanors
- Learn how mental disease and defect play into gun possession

*Todd A. Snow, Snow Law, S.C., Waupun*

### PRACTICE MANAGEMENT TRACK

**Session 1 Thursday 2:45-3:35 p.m. No Credit**

#### More Than a Handshake: Effective Networking

Networking is more than just handing your business card to everyone you meet at a happy hour. Discover how you can get people to know, like, and trust you. Understand how leveraging networking skills can help you build stronger relationships with potential clients and referral sources. Then start using your newfound techniques to network your way through the Conference!

*Drew Coursin, Carex Consulting Group, Inc., Madison; Jeffrey M. Glazer, U.W. Law & Entrepreneurship Clinic, Madison*

**Session 2 Thursday 4:05-4:55 p.m. 1.0 LPM Credit**

#### Mayday! Mayday! Lessons Learned from Setting Up Shop

"If only I knew then what I know now." Inexperience can be frustrating and expensive as you face the challenges of starting, growing, and maintaining a law practice. Gain insights and solutions to common hurdles practice owners must overcome, including:

- Hiring and firing
- Finding the right clients
- Identifying essential products and services to use

*Mark J. Goldstein, Goldstein Law Group, S.C., Milwaukee; J. David Krekeler, Krekeler Strother, S.C., Madison; Sarah L. Ruffi, Ruffi Law Offices, S.C., Wausau*

**Session 3 Friday 11:00-11:50 a.m. 1.0 LPM Credit**

#### Leadership for Lawyers

Why manage a good law firm when you can lead a great one? Even the smallest firm can benefit from great leadership. Discover the secrets to successful law firm leadership. Plus, learn why strong leadership is critical for your law practice:

- Good leadership skills attract good lawyers
- Clients look to attorneys to lead them through their cases
- Leading your practice to smart business decisions means greater results
- Insights to advising business clients

*Matthew Pletzer, Lift Consulting LLC, Madison; Susan Thomson, ActionCOACH, Madison*

**2017 CONFERENCE  
PLATINUM SPONSORS**

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ROTTIER S.C.®**

## Program Descriptions (continued)

**Session 4 Friday 1:40-2:30 p.m. 1.0 CLE/EPR Credit**

### In Social Media, "E" is for Ethics

To meet the demands of a growing number of users, Facebook, LinkedIn, Twitter, and other social media platforms are becoming increasingly sophisticated. That means more complex ethical conundrums for lawyers when it comes to communicating with clients, advertising, and advising clients about social media.

Receive clarity and guidance on navigating social media's ethical challenges, such as:

- Required competence in social media
- A lawyer's own social media regulation
- Advising clients about adding or removing information from social media
- Using social media information provided by the client
- Viewing the public portion of a social media website
- Contacting an unrepresented party to view a restricted social media website

*Aviva M. Kaiser, State Bar of Wisconsin, Madison; Aly Lynch, Next Step Legal Consulting LLC, Madison; Spencer X. Smith, Spencer X. Smith Consulting, Waunakee*

**Session 5 Friday 2:50-3:40 p.m. 1.0 LPM Credit**

### Method to the Madness: Building Processes into Your Law Firm

Missing deadlines or bungling an action can result in malpractice claims and even OLR sanctions. But you can easily avoid that scenario by implementing simple, client-centric processes into your practice. Learn how processes make your firm more efficient, create happy clients, help you avoid missteps, and build staff confidence. Hear a panel discussion on how to build processes around:

- Intake
- Client communication
- Standardized forms
- Checklists
- Routine tasks

*Erin R. Ogden, OgdenGlazer LLC, Madison; Sarah L. Ruffi, Ruffi Law Offices, S.C., Wausau*

**Session 6 Friday 4:00-4:50 p.m. 1.0 CLE Credit**

### Everyone Has a Story: Here's How to Tell Yours

Whether you're speaking to a judge, jury, clients, opposing counsel, or the public, everyone loves a good story. Learn how to use common storytelling structures and other public speaking methods to capture and keep the attention of your audience while communicating facts and arguments effectively. Gain skills to improve oral arguments, negotiations, client development, and even dinner parties.

*Spencer X. Smith, Spencer X. Smith Consulting, Waunakee; William R. Wick, Nash, Spindler, Grimstad & McCracken LLP, Manitowoc*

**Session 7 Saturday 8:30-9:20 a.m. 1.0 CLE Credit**

### Ten Lessons for More Effective Legal Writing

Make your contracts, briefs, and emails clearer, more compelling, and concise. Discover ten lessons for better legal writing from the founding fathers, civil rights activists, and U.S. Supreme Court Justices.

*Stephanie L. Melnick, Melnick & Melnick, S.C., Mequon*

**Session 8 Saturday 9:50-10:40 a.m. 1.0 CLE Credit**

### Getting to Yes: Secrets to Successful Negotiation

Empirical studies show that effective negotiators balance five different skills. This interactive session teaches you the importance of assertiveness, empathy, flexibility, social intuition, and ethicality, and also how to improve your own negotiation techniques.

*Andrea Schneider, Director of Dispute Resolution Program, Marquette University Law School, Milwaukee*

## TECHNOLOGY TRACK

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**Session 1 Thursday 2:45-3:35 p.m. 1.0 LPM Credit**

### Supercharged Legal Research with Fastcase

Don't settle for mediocre legal research tools. Discover how the Fastcase online law library can supercharge your research with award-winning analytical tools for locating primary law. Plus, State Bar of Wisconsin members can enjoy Fastcase's unlimited legal research potential for free.

Receive an introduction on how to do simple tasks like pulling up cases or statutes, printing documents, and setting up alerts. In addition, learn how using Boolean operators can help you find relevant materials.

*Christina Steinbrecker Jack, Fastcase, Washington, DC*

**Session 2 Thursday 4:05-4:55 p.m. 1.0 LPM Credit**

### Tools for Your PDF/Paperless Toolbox

Just as a carpenter needs a hammer and saw to work with wood, lawyers need tools to work with electronic documents. Reducing the amount of paper used in your practice is not a dream but a necessity, and PDF is the standard for doing so. Discover tools to make your digital life easier when working with PDFs and digital files.

*Jeffrey S. Krause, Affinity Consulting Group, Waterford*

**Session 3 Friday 11:00-11:50 a.m. 1.0 LPM Credit**

### Getting Work Done with Your iPad

Turn your iPad into a production device without the bulk of a laptop. The presenters will show you how to use your iPad and its available apps - including Office 365 - efficiently and effectively.

*Mark C. Metzger, Law Office of Mark C. Metzger, Naperville*

**Session 4 Friday 1:40-2:30 p.m. 1.0 LPM Credit**

### Getting the Most from Outlook

Microsoft Outlook can help you organize your inbox and become more efficient - but only if you know how to fully use its capabilities. Receive an in-depth look at:

- Microsoft Outlook
- Microsoft Exchange Server
- Office 365
- POP email

Plus, learn how apps can work with each other inside Outlook and find tips for unifying your communications.

*Bryan Sims, Sims Law Firm Ltd., Naperville, IL*

**Session 5 Friday 2:50-3:40 p.m. 1.0 LPM Credit**

### Protecting Your Digital A\$\$ets

The only true defense against ransomware and other digital catastrophes is a current and complete backup. This session will provide you with a solid foundation on:

- Types of backups
- Backup software
- Where to save your important data to protect it from cyber criminals and natural disasters

*Brent J. Hoeft, Hoeft Law LLC, Madison; Nerino J. Petro, Jr., Belvidere, IL*

**Session 6 Friday 4:00-4:50 p.m. 1.0 LPM Credit**

### 50 Tips in 50 Minutes

It's an annual favorite! Hear dozens of practical tips and tricks for getting things done better, faster, and maybe even cheaper. Panelists will share knowledge and tips you can begin implementing immediately in your practice.

*Jeffrey S. Krause, Affinity Consulting Group, Waterford; Mark C. Metzger, Law Office of Mark C. Metzger, Naperville; Nerino J. Petro, Jr., Belvidere, IL; Bryan Sims, Sims Law Firm Ltd., Naperville, IL*

**Session 7 Saturday 8:30-9:20 a.m. 1.0 LPM Credit**

### Wonder Word Powers Activate!

Get your Word on and take it up a notch. In this power hour of Microsoft Word tips and tricks, explore features you may not know exist but that can make your drafting so much simpler.

*Mark C. Metzger, Law Office of Mark C. Metzger, Naperville, IL*

**Session 8 Saturday 9:50-10:40 a.m. 1.0 LPM Credit**

### Take Me to the Cloud

Discover how to use cloud-based solutions for organizing, storing, and safely sharing your digital documents in the office as well as with outside counsel, clients, and third parties.

*Jeffrey S. Krause, Affinity Consulting Group, Waterford*

## QUALITY OF LIFE/ETHICS TRACK

**Session 1 Thursday 2:45-3:35 p.m. 1.0 CLE/EPR Credit**

### An Ethics "Fee for All"

Attorney's fees are filled with possible ethical pitfalls. Receive an analysis of topics with the greatest potential for trouble, including:

- Fee agreements
- Engagement letters
- Scope of representation
- Advances
- Third-party payments
- Security for fees
- Guaranties
- Charging interest
- Ensuring fees are reasonable
- Contingent fee agreements
- Limited scope representation

In addition, understand the risk of a legal malpractice counterclaim in response to filing an action to collect fees.

*Brian C. Anderson, Wisconsin Lawyers Mutual Insurance Co., Madison; Aviva M. Kaiser, State Bar of Wisconsin, Madison; J. David Krekeler, Krekeler Strother, S.C., Madison*

**Session 2 Thursday 4:05-4:55 p.m. 1.0 LPM Credit**

### Cyberliability and the Payment Card Industry

If your firm accepts credit card payments or is thinking of doing so, don't miss this session. The payment card industry has higher standards than even lawyers when it comes to collecting and storing clients' payment information. Learn what you must do to ensure you're complying with the rules of the payment card industry (PCI). Find out more about:

- Benefits and risks of online payments and credit card payments
- PCI compliance
- Common mistakes that increase your liability

## Program Descriptions (continued)

- Dangers of commingling funds between trust and operating accounts
- Best practices to decrease the potential of leaked payment information
- Recent changes in payment technology
- Tips for creating a digitally secure firm

Caroline Tipton, AffiniPay, Austin, TX

**Session 3 Friday 11:00-11:50 a.m. 1.0 CLE/EPR Credit**

### Pro Bono Work is a Professional Obligation

Pro bono work may not bring dollar signs to your bottom line, but every lawyer has an ethical obligation to perform pro bono service. Learn what the rules say about how much and where lawyers should focus their efforts. Additionally, gain insight regarding your obligations once you undertake pro bono work.

You'll also learn how pro bono's benefits branch out far beyond a quantifiable number. A panel of three pro bono professionals show you how taking on these types of cases can further your firm.

Jeffery L. Brown, State Bar of Wisconsin, Madison; J. David Krekeler, Krekeler Strother, S.C., Madison; Margaret Niebler-Brown, Legal Action of Wisconsin Inc., Milwaukee

**Session 4 Friday 1:40-2:30 p.m. 1.0 LAU Credit**

### Positive Psychology for Lawyers: Tools for Quality of Life

The new science of positive psychology provides a proactive approach for lawyers to decrease stress, raise levels of well-being, and prevent depression, anxiety, burnout, and other mental health concerns.

Understand the neuroscience behind positive psychology. Learn about empirically supported positive psychology exercises that increase positive emotions. Even practice some of these exercises and experience the positivity boosting effects.

Hallie Love, Positive Psychology for Lawyers, Santa Fe, NM

**Session 5 Friday 2:50-3:40 p.m. 1.0 CLE/EPR Credit**

### Breaking Up is Hard to Do: Severing the Lawyer-Client Relationship

Receive a framework for analyzing whether you can, should, or must part ways with the client. Be able to identify the ethical, malpractice, and interpersonal concerns of terminating representation.

Once you've made the decision to terminate, understand your obligations and best practices, including:

- Surrendering papers and property to the client
- Proper timing
- What to put in your termination letter

Aviva M. Kaiser, State Bar of Wisconsin, Madison; Todd Scott, Vice President of Risk Management, Minnesota Lawyers Mutual Insurance Company, Minneapolis; Mary Spranger, State Bar of Wisconsin, Madison

**Session 6 Friday 4:00-4:50 p.m. 1.0 CLE/EPR Credit**

### Diminished Capacity in the Elderly or Declining Client

When a client's decision-making capacity is in decline, attorneys must take special care to ensure that they are continuing to meet ethical standards. Learn answers to questions such as:

- How can you assess the decision-making ability of your client and how often should you reassess?
- What traps are present when working with a client's family on behalf of the client?
- How do you discern whether the client's wishes are being conveyed? –
- What reasonable protective measures should you take on behalf of the client?

Jennifer A. O'Neill, O'Neill Elder Law LLC, Hudson

**Session 7 Saturday 8:30-9:20 a.m. 1.0 LAU Credit**

### Flying Solo and Enjoying the Ride

Do you really want to fly solo? Working for yourself can be liberating as well as stressful. Hear from three solo attorneys as they share their best practices for optimizing the rewards and mitigating the headaches. See how to focus your practice around your passions, minimize stress, and achieve work-life balance in the process.

William Bratcher, Bratcher Law Office LLC, Thorp; Kimberly A. Henderson, Henderson Law Office, West Salem; Sarah Slice Yacoub, Slice Law Inc., Hudson

**Session 8 Saturday 9:50-10:40 a.m. 1.0 CLE/EPR Credit**

### The Legal Industry of Tomorrow Arrived Yesterday

Explore the challenges and opportunities of the legal industry of tomorrow at this insightful panel discussion. Among the featured panelists are Josh King, general counsel for AVVO, and Amber Hollister, general counsel for the Oregon State Bar.

Delve into disruptive changes in the law practice environment, such as:

- Realities of an internet-centered economy
- Consumer self-navigation ecosystem
- Spontaneous private deregulation

Plus, discover how the Oregon State Bar is preparing for the future through the recommendations of its Futures Task Force.

Edward A. Hannan, Hannan Legal LLC, Greendale; Amber Hollister, General Counsel, Oregon State Bar, Tigard, OR; Aviva M. Kaiser, State Bar of Wisconsin, Madison; Josh King, General Counsel, AVVO, Seattle

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