

# ONSITE PROGRAM

STATE BAR OF WISCONSIN  
**Annual Meeting &**  
**CONFERENCE 2025**

June 18-20, 2025

Monona Terrace Community and Convention Center  
Madison, Wisconsin



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STATE BAR OF WISCONSIN

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STATE BAR OF WISCONSIN  
2025 ANNUAL MEETING  
& CONFERENCE  
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# Welcome to the 2025 Annual Meeting & Conference

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## Important: Sign in for CLE credits!

Please be sure to sign in at the Registration Desk each day to ensure your attendance is accurately reported to the BBE.

## A SPECIAL THANK YOU

### Annual Meeting and Conference Advisory Group

**Atty. Brent Eisberner** - Levine Eisberner LLC, Madison  
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**Atty. Tracy Waldinger** - Miller Spankowski & Waldinger LLC, Portage

### Sections

**Atty. Andrea Farrell** - The Jeff Scott Olson Law Firm, S.C., Waunakee  
**Atty. Kristen Elizabeth Lonergan** - Crooks Law Firm, S.C., Wausau

### Judges

**Hon. Eugene Gasiorkiewicz** - Racine County Circuit Court, Racine  
**Hon. Lisa K. Stark** - Wisconsin Court of Appeals District III, Wausau  
**Hon. Michael Waterman** - St. Croix County Circuit Court, Hudson

### WALA

**Ms. Pamela M. Zacharias** - Meissner Tierney Fisher & Nicholas, S.C., Milwaukee

### Staff Liaison

**Atty. Annette Ashley** - State Bar of Wisconsin, Madison

### CLE Committee

#### Chairperson

**Atty. Peter T. Nowak** - Swanson Sweet LLP, Oshkosh

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**Atty. Auriel Ackerman** - Husch Blackwell LLP, Milwaukee  
**Atty. Robert A. Anderson** - U.S. Attorney's Office, Madison  
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**Atty. Lindsey K. Kohls** - Bakke Norman, S.C., Eau Claire  
**Atty. Lance Leonhard** - Marathan County Administration, Wausau  
**Atty. Shawn Patrice Nedd** - OptumHealth, De Pere  
**Atty. Nadeska E. Nino-Gomez** - Zacherl, O'Malley & Endejan, S.C., Fond du Lac  
**Atty. Erin R. Ogden** - Ogden Glazer + Schaefer, Madison  
**Atty. Samantha Christine Olexa** - Michael Best & Friedrich LLP, Milwaukee  
**Atty. Molly Pappenheim** - Wisconsin Office of the Commissioner of Insurance Legal Unit, Madison  
**Atty. Nathan Petrashek** - Wisconsin Court of Appeals District II, Waukesha

#### BOG Liaison

**Atty. Stephen Walter Sawyer** - Sawyer Law LLC, Stevens Point

#### Staff Liaison

**Ms. Theresa Elliott** - State Bar of Wisconsin, Madison

# CONFERENCE AT A GLANCE

## Wednesday, June 18, 2025

- 12:00 p.m. - 6:00 p.m. Registration
- 12:30 p.m. - 4:00 p.m. WALA Sessions
- 4:30 p.m. - 6:00 p.m. Presidential Swearing-In Ceremony and Celebration
- 6:00 p.m. - 7:00 p.m. Marquette/UW Law School Alumni Reception

## Thursday, June 19, 2025

- 7:00 a.m. - 5:00 p.m. Registration
- 7:30 a.m. - 5:00 p.m. Legal Expo 2025
- 8:15 a.m. - 9:30 a.m. Opening Plenary: Multistate Litigation Against the Federal Government
- 9:50 a.m. - 4:30 p.m. CLE Sessions
- 12:30 p.m. - 1:30 p.m. Networking Luncheon
- 4:30 p.m. - 5:30 p.m. Young Lawyers Division and Judges Networking Reception
- 5:15 p.m. - 5:45 p.m. Networking Reception
- 5:45 p.m. - 7:00 p.m. Member Recognition Celebration

## Friday, June 20, 2025

- 7:30 a.m. - 12:00 p.m. Registration
- 8:00 a.m. - 11:40 a.m. Legal Expo 2025
- 8:00 a.m. - 9:15 a.m. Plenary: A Day in the Life of the Ethics Hotline: Calling All Conflicts
- 9:30 a.m. - 11:25 a.m. CLE Sessions
- 11:40 a.m. - 12:30 p.m. Closing Plenary: The End of Deference? *Tetra Tech*, *Loper Bright*, and Judicial Review of Agency Decisions



# GENERAL INFORMATION

## Registration

- Wednesday 12:00 p.m. - 6:00 p.m.
- Thursday 7:00 a.m. - 6:00 p.m.
- Friday 7:30 a.m. - 12:00 p.m.

## Credits

AMC will be submitted to the Wisconsin Board of Bar Examiners for up to 11.5 credit hours. Be sure to sign in at the registration desk each morning before heading to the sessions that suit your interests and credit needs.

The in-person Conference offers up to 11.5 total credit hours across 3 plenaries and 18 breakout sessions. Your total credit breakdown by type (CLE, EPR, LAU, and LPM) will depend on the sessions you attend. View the schedule for a detailed breakdown of credits by session.

We will not be applying for Illinois or Minnesota CLE for this event; however, attendees can self-report. Attendance verification forms will ONLY be completed onsite at each session.

**Please sign in at the Conference registration desk each day** to ensure your attendance is accurately reported to the BBE.

## Earn Even More Credits AFTER the Conference!



No need to worry about missing a breakout session. We'll be recording and webcasting select breakout sessions, and Conference attendees can attend the first two sets of webcasts for **FREE**. That's up to 7.5 additional credit hours!

Look for the camera icon in the schedule to identify the sessions that will be recorded and replayed.

## Judicial Education Credits

AMC 2025 is approved for judicial education credit hours. Please complete and submit any forms required by the Judicial Education Commission directly to them to receive your credits.

## Conference Access

All attendees must be registered for the conference and have an AMC name badge to access CLE sessions, the Thursday Luncheon, continental breakfasts, refreshment breaks, receptions, celebrations, networking events, and the Legal Expo. There are no exceptions to this policy.

**Please wear your name badge at all official conference functions.** Your badge is your admission pass to all CLE programs, special events, and non-ticketed events. It also makes it easy to reconnect with old friends and meet new colleagues. Look for color-coded badge ribbons to spot State Bar speakers, exhibitors, and staff.

**Please recycle your name badge holder.** Before you leave the Conference, drop your name badge holder into one of the name badge collection boxes. Thanks for doing your part to reduce waste and protect the environment!

## Continental Breakfasts and Refreshment Breaks

Join your colleagues in the Legal Expo for continental breakfasts and refreshment breaks. While you're at it, stop by the exhibitor booths in the Legal Expo to visit and get your Passport to Prizes signed.

## Listing of Pre-Registrants

Wondering who else is here? A list of all the judges and lawyers who have preregistered for the Conference is available at registration.

## Legal Expo 2025

- Thursday 7:30 a.m. to 5:00 p.m.
- Friday 8:00 a.m. to 11:40 a.m.

Visit the Legal Expo to meet the companies that design products and services just for the legal profession. Our exhibitors are a vital part of AMC's success, and they truly value your support!

## Passport to Prizes – You Could Win Big Prizes!

Sponsored by Paralegal Association of Wisconsin

Use the Passport to Prizes you received at registration for a chance to win fantastic prizes. Have each exhibitor at the Legal Expo sign your Passport, then drop it off at the State Bar booth. Winners will be drawn after the Friday morning break and announced in the Expo area before the closing plenary session. You don't have to be present to win.

### Prizes include:

Epson Ds-70 Document Scanner with ALK00 Compatible Case

Rocketbook New Mini Reusable Smart Notepad, Pocket Size

HP Chromebook 14 Laptop

Baggalini Tribeca Expandable Laptop Backpack with RFID

Samsung Galaxy Watch 7 Bespoke Edition

Arboleaf Thermacool Massage Gun

Mini Projector, VOPLLS 1080P Full HD WiFi Bluetooth Video Projector

Beats Solo 4-Wireless Bluetooth On-Ear Headphones (Android and Apple Compatible) with Apple 20W USB-C Power Adapter

AI Voice Recorder, PLAUD note voice Recorder with Case, App Control, Transcribe & Summarize with AI Technology, Recorder for Lectures, Meetings, Calls

Power Bank Fast Charging 50000 mAh, 65 W Laptop Portable Charger USB C Compatible with MacBook, Dell, PD External Battery Bank Compatible with iPhone, Cell Phone, Tablet

Free Admission/Registration Package for AMC 2026 and PINNACLE® Gift Certificates for Seminars, Conferences, Books, and Books Unbound Titles

### We Value Your Feedback!

After the Conference, watch for an email inviting you to share your thoughts on AMC. Your input helps us make future Conferences even better.

## SPECIAL EVENTS

### Presidential Swearing-In and Celebration

Wednesday, June 18

4:30 – 6:00 p.m.

Ballroom C/D

Sponsored by WILMIC & Kohner, Mann & Kailas, S.C.

Join us as we “pass the gavel” and celebrate a historic moment—the swearing-in of Dan D. Gartzke as the 70<sup>th</sup> President of the State Bar of Wisconsin! We'll also honor and applaud the leadership of our outgoing President, Ryan Billings, as his remarkable term comes to a close.



President  
Ryan Billings



President-elect  
Dan D. Gartzke

### Marquette and University of Wisconsin Law Schools Alumni Reception

Wednesday, June 18

6:00 – 7:00 p.m.

Grand Terrace West

Immediately following the Swearing-In, join friends and colleagues from the Marquette and UW Law Schools for refreshments and socializing. But this gathering isn't limited to Badgers and Golden Eagles. No matter the school or the mascot, everyone is welcome!

### Networking Luncheon

Thursday, June 19

12:30 – 1:30 p.m.

Ballroom C/D

Sponsored by Senior Lawyers Division & Habush, Habush & Rottier

Connect with colleagues over lunch and engage in meaningful conversations that spark ideas and inspire fresh perspectives. Share experiences and expand your professional network while enjoying a great meal.

### Judges and Young Lawyers Division Members Social Hour

Thursday, June 19

4:30 – 5:30 p.m.

Hall of Ideas J

Sponsored by Young Lawyers Division

There's no better place for young lawyers to network with judges! Young Lawyers Division members, take advantage of this unique opportunity to engage with the judges attending AMC 2025. Refreshments and appetizers will be provided, compliments of the Young Lawyers Division. A cash bar will also be available. This event is exclusive to YLD members and judges.

### Networking Reception

Thursday, June 19

5:15 – 5:45 p.m.

Ballroom C/D

Sponsored by Kramer, Elkins & Watt LLC

Join fellow attendees and guests for a networking reception prior to the Member Recognition Celebration. Reconnect with friends and colleagues from Wisconsin and across the country as you enjoy delicious hors d'oeuvres, cocktails, and non-alcoholic beverages.

### Member Recognition Celebration

Thursday, June 19

5:45 – 7:00 p.m.

Ballroom C/D

Sponsored by Wisconsin Law Foundation & Senior Lawyers Division

This annual event shines a spotlight on award recipients who have advanced justice, educated the public, and driven meaningful change. Come celebrate their achievements, hear their inspiring stories, and leave with a renewed sense of pride in your profession.

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*\*Fee sharing arrangements where allowed per the rules of professional conduct.*

# State Bar of Wisconsin 2025 Member Recognition Celebration



Thursday, June 19

5:15 p.m - 5:45 p.m. Networking Reception - Sponsored by Kramer, Elkins & Watt LLC

5:45 p.m - 7:00 p.m. Member Recognition Celebration - Sponsored by Wisconsin Law Foundation

Each year we honor the attorneys, judges, law firms, organizations, and students who have advanced justice, educated the public, and driven meaningful change. Come celebrate their achievements, hear their inspiring stories, and leave with a renewed sense of pride in your profession. To learn more about these awards, visit [wisbar.org](http://wisbar.org).



**Lifetime Jurist Award**  
Judge Barbara Key



**Judge of the Year Award**  
Judge Chad A. Hendee



**Diversity & Inclusion Trailblazer Award**  
T.R. Williams



**Hon. Charles Dunn Author Award**  
Timothy D. Edwards



**Hon. Charles Dunn Author Award**  
Hayley Rich-Noble



**Pro Bono Attorney of the Year Award**  
Sarah A. Johnson



**Pro Bono Firm/Organization  
of the Year Award**  
WisLawHelp.org



**Dan Tuchscherer Outstanding  
Public Interest Law Attorney**  
Ellen M. Pimentel



**WALA Award of Excellence**  
Christopher C. Shattuck



**Nonresident Lawyers Division  
Founder's Award**  
Kene O. Okocha



**Government Lawyers Division  
Grant F. Langley Service Award**  
James 'Griff' Griffin



**Senior Lawyers Division  
Leonard L. Loeb Award**  
Dean R. Dietrich



**Young Lawyers Division's  
Outstanding Mentor Award**  
Mary Ferwerda



**Young Lawyers Division's  
Outstanding Young Lawyer of the Year**  
Jason 'JJ' Moore



**Outstanding Public Interest Law Student Award -  
Marquette University Law School**  
Diego Romero



**Outstanding Public Interest Law Student Award -  
University of Wisconsin Law School**  
Judith Cusack



**Ryan Klesh Outstanding Public Interest  
Legal Worker Award**  
Rhonda Van Pembroke  
(Posthumously)

# PROGRAMS & EVENTS

WEDNESDAY – June 18, 2025		CLE Credit Hours
Time	Event	
12:00 p.m. - 6:00 p.m.	Conference Registration Open - Capitol Promenade	
12:30 p.m. - 1:30 p.m.	WALA Session: Cybersecurity for Law Firms: Protecting Client Trust in the Digital Era - Hall of Ideas E/F	1.0 CLM
1:45 p.m. - 2:45 p.m.	WALA Session: AI in Law Firms: Balancing Technology, Compliance, and Effective Practice Management - Hall of Ideas E/F	1.0 CLM
3:00 p.m. - 4:00 p.m.	WALA Session: The Role of OLR, and Ethical Obligations and Risk Management for Law Firms - Hall of Ideas E/F	1.0 CLM
4:30 p.m. - 6:00 p.m.	Presidential Swearing-In and Celebration - <i>Sponsored by: WILMIC &amp; Kohner, Mann &amp; Kailas, S.C.</i> - Ballroom C/D	
6:00 p.m. - 7:00 p.m.	Marquette/UW Law School Receptions (all attendees are invited) - Grand Terrace West	

THURSDAY – June 19, 2025		CLE Credit Hours
Time	Event	
7:00 a.m. - 9:00 a.m.	Continental Breakfast - <i>Sponsored by: Kohner, Mann &amp; Kailas, S.C.</i>	
7:00 a.m. - 6:00 p.m.	Registration - Capitol Promenade	
7:30 a.m. - 5:00 p.m.	Legal Expo Open - Grand Terrace	
8:00 a.m. - 9:30 a.m.	<b>Opening Plenary:</b> Multistate Litigation Against the Federal Government - <i>Sponsored by: Litigation Section</i> - Ballroom C/D	1.5 CLE
9:30 a.m. - 9:50 a.m.	Refreshment Break - <i>Sponsored by: Quarles</i> - Grand Terrace	
<b>Session 1</b> 9:50 a.m. - 10:50 a.m.	Survey of Wisconsin Dispute Resolution - <i>Sponsored by: American Arbitration Association</i> - Ballroom B	1.0 CLE
	Working With Clients Who May Have Diminished Capacity - Hall of Ideas E/F	1.0 CLE
	Advising the Nonprofit Board -- An Introduction - Ballroom A 🏹	1.0 CLE
10:50 a.m. - 11:10 a.m.	Refreshment Break - <i>Sponsored by: Law Office of Alexis Pheiffer</i> - Grand Terrace	
<b>Session 2</b> 11:10 a.m. - 12:25 p.m.	Next-Level Appellate Briefs: Framing the Issues on Appeal - Ballroom A 🏹	1.5 CLE
	Tribal Sovereignty & Protection of Indigenous Culture - Ballroom B	1.5 CLE
	Where Paths Collide: Identifying Pitfalls of Overlapping Practice Areas - Hall of Ideas E/F	1.5 CLE
12:30 p.m. - 1:30 p.m.	<b>Networking Luncheon</b> - <i>Sponsored by: Senior Lawyers Division &amp; Habush, Habush &amp; Rottier</i> - Ballroom C/D	
<b>Session 3</b> 1:35 p.m. - 2:50 p.m.	Moral Injury as an Occupational Hazard Among Lawyers & Judges - Ballroom B	1.5 LAU
	Essential Gift and Estate Tax Planning Before 2026 - Ballroom A 🏹	1.5 CLE
	Handling Complex Civil and Commercial Cases: Best Practices for Judges and Lawyers - Session One - Hall of Ideas E/F	1.5 CLE
2:50 p.m. - 3:15 p.m.	Refreshment Break - <i>Sponsored by: JAMS</i> - Grand Terrace	
<b>Session 4</b> 3:15 p.m. - 4:30 p.m.	The State of AI in Legal Practice: An Update on Ethics and Implementation of AI into Legal Technology - Ballroom B	1.5 LPM
	Trade Policy in a New Administration: Looking Ahead the Next Four Years - Ballroom A 🏹	1.5 CLE
	Handling Complex Civil and Commercial Cases: Best Practices for Judges and Lawyers – Session Two - Hall of Ideas E/F	1.5 CLE
4:30 p.m. - 5:30 p.m.	YLD/Judges Exclusive Cocktail Hour - <i>Sponsored by: Young Lawyers Division</i> - Hall of Ideas J	
5:15 p.m. - 5:45 p.m.	Networking Reception - <i>Sponsored by: Kramer, Elkins &amp; Watt LLC</i> - Ballroom C/D	
5:45 p.m. - 7:00 p.m.	Member Recognition Celebration - <i>Sponsored by: Wisconsin Law Foundation &amp; Senior Lawyers Division</i> - Ballroom C/D	

FRIDAY — June 20, 2025		CLE Credit Hours
Time	Event	
7:00 a.m. - 9:00 a.m.	Continental Breakfast - <i>Sponsored by: Kohner, Mann &amp; Kailas, S.C.</i>	
7:30 a.m. - 12:00 p.m.	Registration - Capitol Promenade	
8:00 a.m. - 11:40 a.m.	Legal Expo Open - Grand Terrace	
8:00 a.m. - 9:15 a.m.	<b>Opening Plenary:</b> A Day in the Life of the Ethics Hotline: Calling All Conflicts - <i>Sponsored by: WILMIC</i> - Ballroom C/D	1.5 CLE/EPR
9:15 a.m. - 9:30 a.m.	Refreshment Break - <i>Sponsored by: WILMIC</i> - Grand Terrace	
<b>Session 5</b> 9:30 a.m. - 10:20 a.m.	Reproductive Rights Update: In Wisconsin and Nationwide - Ballroom B	1.0 CLE
	Discouraging Reckless Driving: Opportunities and Legal Limitations for Communities - Hall of Ideas E/F	1.0 CLE
	IP Issues for Business Practitioners - Ballroom A 	1.0 CLE
<b>Session 6</b> 10:35 a.m. - 11:25 a.m.	Children's Data Privacy - Ballroom A 	1.0 CLE
	Greenwashing & Other Trending Litigation Concerns: Is it Too Easy Being Green? - Ballroom B	1.0 CLE
	Demystifying Reverse Mortgages - Hall of Ideas E/F	1.0 CLE
11:25 a.m. - 11:40 a.m.	Break - <i>Sponsored by: Hupy &amp; Abraham</i> - Grand Terrace	
11:40 a.m. - 12:30 p.m.	<b>Closing Plenary:</b> The End of Deference? <i>Tetra Tech, Loper Bright</i> , and Judicial Review of Agency Decisions - <i>Sponsored by: Business Law Section &amp; Labor &amp; Employment Law Section</i> - Ballroom C/D	1.0 CLE

 Programs that will be offered as webcast replays. CLE credits are pending final approval from the BBE. Confirmed credit listing will be posted on the AMC microsite and emailed to attendees. **CLM credits are for WALA members only.**

## Business meetings:

### Wednesday, June 18

8:30 am – 11:45 am WisTAF Business Meeting .....Hall of Ideas J  
1:00 pm – 3:00 pm Access to Justice.....Hall of Ideas J

### Thursday, June 19

9:30 a.m. – 10:45 a.m. Business Law Section .....Meeting Room L  
9:45 a.m. – 12:00 p.m. Nonresident Lawyers Division.....Dane Room  
11:00 a.m. – 12:00 p.m. Dispute Resolution Section .....Hall of Ideas J  
12:00 p.m. – 1:30 p.m. Dispute Resolution Section  
Networking Lunch.....Hall of Ideas J  
12:30 p.m. – 1:30 p.m. Appellate Practice Section .....Meeting Room L  
1:30 p.m. – 4:00 p.m. Senior Lawyers Division.....Dane Room  
1:45 p.m. – 3:00 p.m. International Practice Section .....Meeting Room M

### Friday, June 20

8:00 a.m. – 9:15 a.m. Solo/Small Firm & General Practice Section.....Dane Room  
9:30 a.m. – 12:00 p.m. Young Lawyers Division .....Hall of Ideas J  
10:30 a.m. – 11:30 a.m. Civil Rights & Liberties Section .....Meeting Room M  
11:45 a.m. – 1:45 p.m. Bankruptcy, Insolvency & Creditors' Rights Section.....Dane Room  
12:45 p.m. – 2:00 p.m. Government Lawyers Division .....Meeting Room N

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# WSSFC2025

Wisconsin Solo & Small Firm Conference

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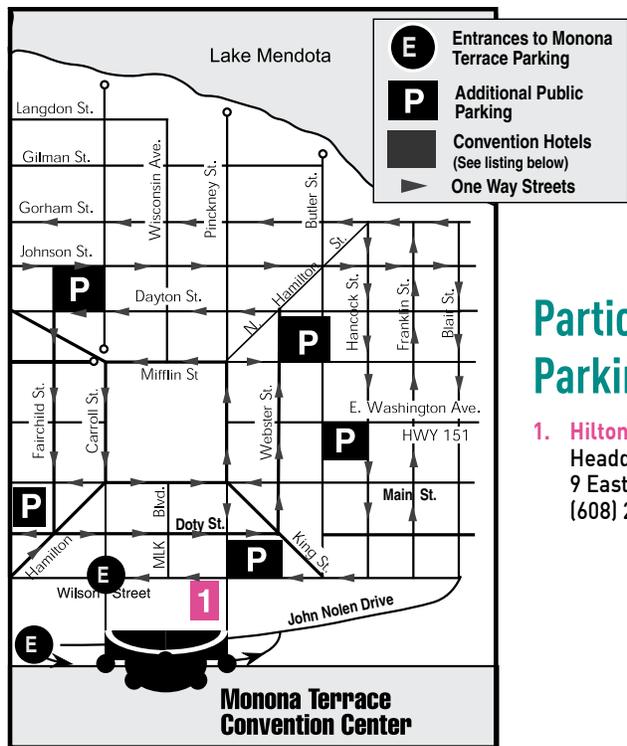
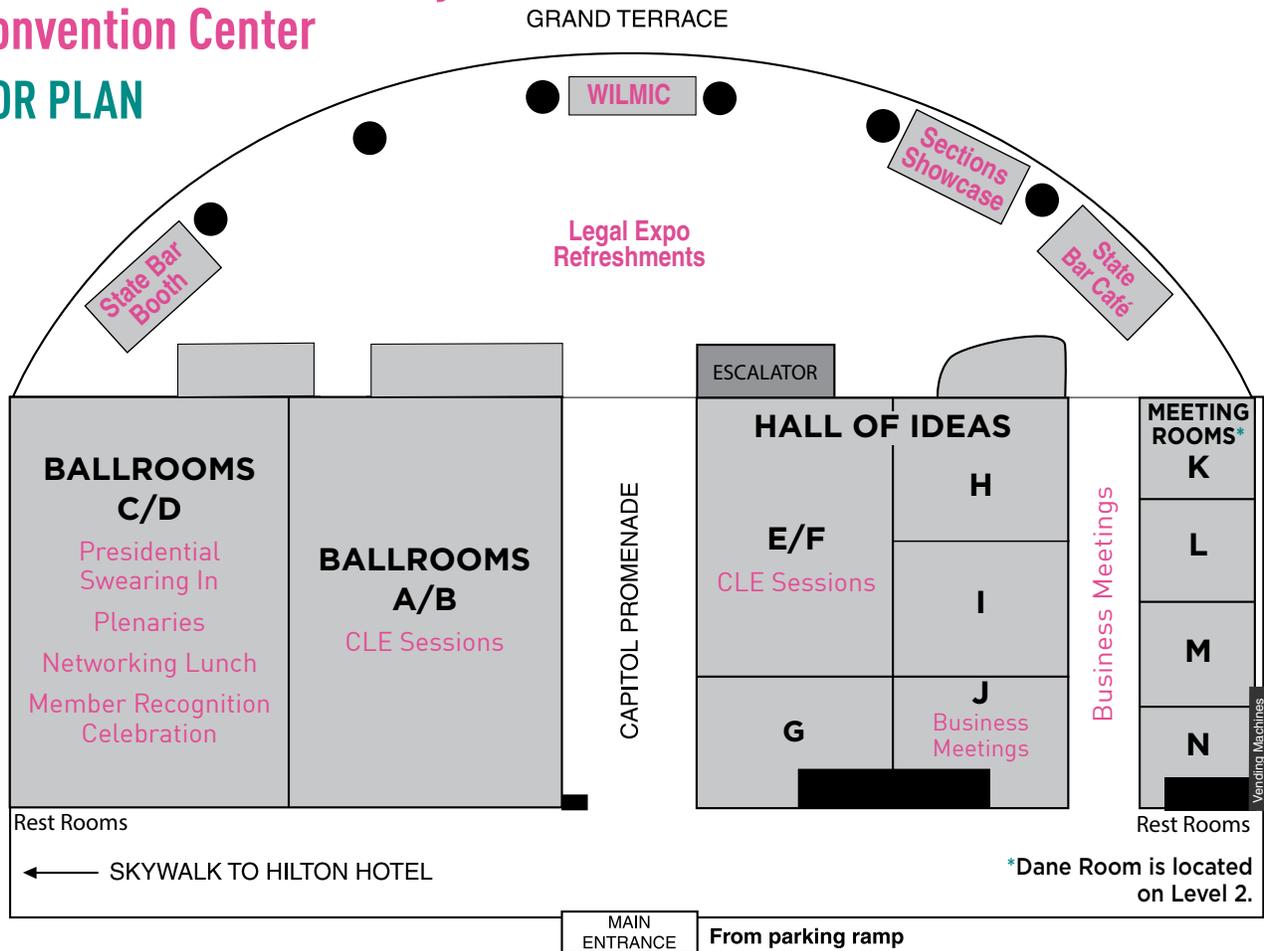


This isn't just a conference—it's a launchpad for what's next.  
WSSFC 2025 is where it all happens.

WSSFC.ORG

IN3429 5/25

## Monona Terrace Community & Convention Center FLOOR PLAN



### Participating Hotel & Parking Information

- Hilton Madison Monona Terrace**  
Headquarter Hotel  
9 East Wilson Street, Madison, WI 53703  
(608) 255-5100 or (866) 403-8838

## Wednesday, June 18

### WALA Educational Sessions

12:30 p.m. – 1:30 p.m.

#### Cybersecurity for Law Firms: Protecting Client Trust in the Digital Era

Safeguarding client trust and sensitive data is more critical than ever in our digital landscape. Receive an overview of common cyber threats targeting law firms, including phishing and ransomware. Discover essential strategies to identify and mitigate cyber threats, ensure regulatory compliance, and implement best practices for data protection. Through real-world case studies and expert insights, you'll gain practical knowledge to strengthen your firm's cybersecurity measures. Don't miss this opportunity to enhance your firm's security and uphold its reputation for safeguarding client data.

*David Eichkorn, Elevity, Madison*

1:45 p.m. – 2:45 p.m.

#### AI in Law Firms: Balancing Technology, Compliance, and Effective Practice Management

Artificial intelligence (AI) is revolutionizing legal practice by streamlining discovery, enhancing research and brief writing, and automating time tracking. However, adopting these technologies also presents risks. Law firms must navigate compliance challenges and understand how AI tools access, store, and use data. Gain practical insights on effectively integrating AI into practice management while ensuring compliance with client and firm requirements.

*Christopher Shattuck, Madison College, Madison*

3:00 p.m. – 4:00 p.m.

#### The Role of OLR, Ethical Obligations, and Risk Management for Law Firms

Every legal professional must understand and adhere to ethical obligations. Receive an overview of Wisconsin's Rules of Professional Conduct, highlighting common ethical pitfalls and how to avoid them. You'll gain practical strategies for managing conflicts of interest, maintaining client confidentiality, and minimizing risk. Join Timothy C. Samuelson, Director of the Office of Lawyer Regulation, to ensure your firm stays compliant and upholds the highest professional standards.

*Timothy C. Samuelson, Office of Lawyer Regulation, Madison*

## Thursday, June 19

8:00 a.m. – 9:30 a.m.

#### PLENARY: Multistate Litigation Against the Federal Government

**Sponsored by:** Litigation Section

There has been a recent flurry of multistate legal challenges to federal government actions. Join us for a keynote presentation in which Wisconsin Attorney General Josh Kaul will answer questions relating to some of the multistate cases in which the Wisconsin Department of Justice is involved.

*Attorney General Josh Kaul, Wisconsin Department of Justice, Madison; Interviewer: Joseph S. Diedrich, Husch Blackwell, Madison*

9:50 a.m. – 10:50 a.m.

#### Survey of Wisconsin Alternative Dispute Resolution

**Presented by:** Dispute Resolution Section, Labor & Employment Law Section, and Solo, Small Firm & General Practice Section

**Sponsored by:** American Arbitration Association

Discover how to resolve disputes efficiently without litigation by leveraging alternative dispute resolution options in courts, agencies, and boards. Veteran practitioners and mediators will share insider strategies, best practices, and important procedural insights so you can navigate these processes with confidence.

*Susan M. Bauman, Susan M. Bauman Mediator/Arbitrator, Madison; Peter G. Herman, U.S. Department of Labor/OSHA, Madison; Lisa F. Kinney, State of Wisconsin, Division of Hearings and Appeals, Madison*

#### Working With Clients Who May Have Diminished Capacity

**Presented by:** Elder Law and Special Needs Section

With cases involving Britney Spears and Michael Oher garnering national attention and an aging population in the U.S., diminished capacity issues have never been more relevant. Learn how to assess a client's capacity and communicate effectively with them or those speaking on their behalf. Understand powers of attorney, guardianship orders, and other key legal documents and evaluate the best way to establish and maintain a productive attorney-client relationship.

*Gregory J. Banchy, Banchy Law Center, Eau Claire*

#### Advising the Nonprofit Board – An Introduction

**Presented by:** Senior Lawyers Division

Gain a foundational understanding of the legal, tax, and regulatory frameworks governing nonprofits and tax-exempt organizations. Explore board responsibilities, tax-exempt status, financial management, and crucial compliance obligations. Learn best practices for advising nonprofits—whether as counsel, board member, or volunteer—to help organizations navigate legal complexities and fulfill their missions responsibly.

*Moderator: Michael J. Morse, Municipal Law & Litigation Group, S.C., Waukesha;*

*Panelists: John R. Decker, Dane County Historical Society, Madison; Dean R. Dietrich, Weld Riley, S.C., Wausau*

11:10 a.m. – 12:25 p.m.

#### Next-Level Appellate Briefs: Framing the Issues on Appeal

**Presented by:** Appellate Practice Section

Mastering the art of issue framing is key to successful appellate advocacy. This session brings together judges and staff attorneys from the Court of Appeals and experienced appellate lawyers to discuss strategies for drafting clear and concise docketing statements, framing the issues for appeal, and applying the right standard of review. You'll learn how to present your case more effectively and maximize your impact on appeal.

*Moderator: Anne-Louise Mittal, Foley & Lardner LLP, Milwaukee;*

*Panelists: Joseph A. Bugni, Hurley Burish, S.C., Madison; Hon. Rachel A. Graham, Wisconsin Court of Appeals District IV, Madison; Hon. Thomas M. Hruz, Wisconsin Court of Appeals District III, Wausau; Nathan A. Petrashek, Wisconsin Court of Appeals District II, Waukesha*

#### Tribal Sovereignty & Protection of Indigenous Culture

**Presented by:** Diversity Inclusion & Oversight Committee and Indian Law Section

With much of our state encompassing tribal territory, understanding tribal courts is essential for Wisconsin practitioners. This engaging panel discussion features tribal leaders from different territories and legal scholars exploring the evolution of tribal courts, self-governance, and the intersection of tribal, state, and federal law. Gain insights into tribal sovereignty, jurisdictional challenges, and how these systems coexist in our modern legal landscape.

*Moderator: Prof. Torey Dolan, University of Wisconsin Law School, Madison;*

*Panelists: W. Tanner Allread, UCLA School of Law, Los Angeles, CA; Samuel R. C. Crowfoot, Siksika Nation Counselor, Alberta, Canada*

# CLE PROGRAMS - Continued

## Where Paths Collide: Identifying Pitfalls of Overlapping Practice Areas

**Presented by:** Bankruptcy, Insolvency & Creditors' Rights Section and Young Lawyers Division

Legal decisions in one area of law can have significant consequences in another. Marriage, divorce, death, and debt can create issues that span multiple practice areas. Explore key intersections between family law, bankruptcy, estate planning, and more so you can recognize and address potential pitfalls. Identify common challenges and receive strategies for effectively advising clients and managing their expectations.

*Anthony J. Procaccio, Randall S. Miller & Associates LLC, Milwaukee; Craig E. Stevenson, Swanson Sweet LLP, Madison; Chelsea Lee Williamson, Cordell & Cordell, Milwaukee*

1:35 p.m. - 2:50 p.m.

## Moral Injury as an Occupational Hazard Among Lawyers & Judges

**Presented by:** State Bar of Wisconsin Lawyer Assistance Program

Examine the concept of moral injury and its framework for understanding burnout, distress, and ineffective coping among legal professionals. Initially studied in veterans, moral injury is now used more broadly to describe the stress caused by institutional betrayals and ethical conflicts. From professional incivility to representing morally challenging clients, attorneys face unique stressors contributing to burnout. Learn how to recognize and address this hidden professional hazard with practical strategies for resilience and well-being.

*Amber Ault, Ph.D., MSW, State Bar of Wisconsin, Madison; Jennifer Lee Edmondson, Edmondson Law Office, Appleton*

## Essential Gift and Estate Tax Planning Before 2026

**Presented by:** Real Property, Probate and Trust Law Section

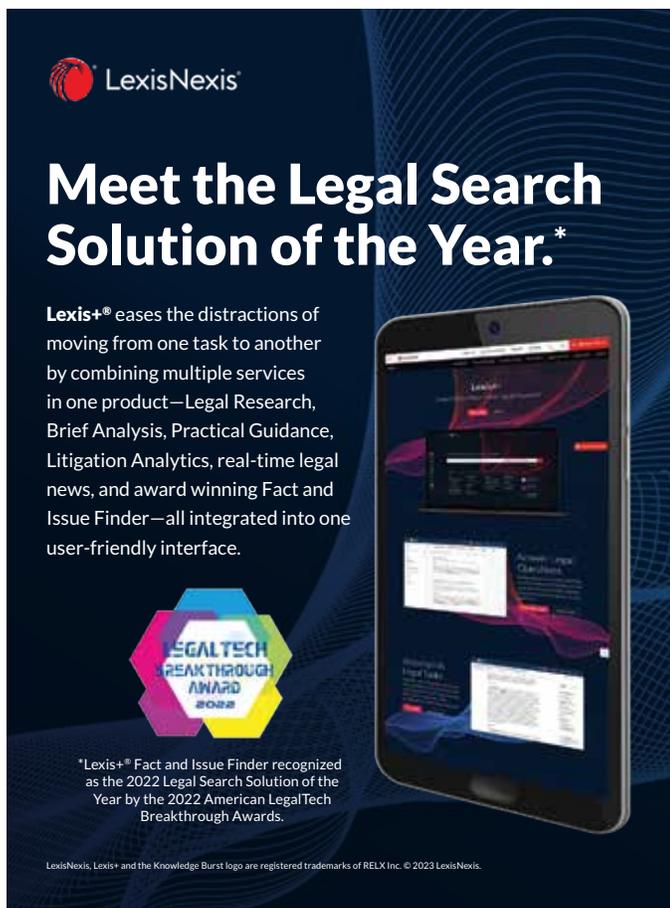
Prepare for the upcoming sunset of the Tax Cuts and Jobs Act and its impact on gift and estate tax exemptions. With the current exemption set to expire at the end of 2025, attorneys must identify clients who can benefit from proactive planning now. Explore key provisions relevant to exemption amounts and discover smart strategies to maximize tax-saving opportunities before 2026 arrives.

*Kelly O'Connor Dancy, Walny Legal Group LLC, Milwaukee; Shanna N. Fink, Ruder Ware, L.L.S.C., Wausau; Steven P. Lipowski, Ruder Ware, L.L.S.C., Wausau*

## Handling Complex Civil and Commercial Cases: Best Practices for Judges and Lawyers - Session One

Explore practical pretrial strategies for handling complex civil and commercial litigation. This lively panel discussion featuring judges and lawyers will cover effective scheduling strategies and tips on managing pretrial issues like discovery disputes and sanctions. Examine the latest electronic discovery techniques and analyze best practices for conducting depositions, including with judicial oversight. You'll also discuss the challenges in designating corporate representatives. Gain insight into mutual expectations between judges and lawyers during the pretrial phase and come away with best practices for courtroom and case management.

**Moderator:** *Hon. Lisa K. Stark, Wisconsin Court of Appeals District III, Wausau;*  
**Panelists:** *Hon. Michael J. Aprahamian, Waukesha County Circuit Court, Waukesha; Hon. Eugene A. Gasiorkiewicz, Racine County Circuit Court, Racine; Terry E. Johnson, von Briesen & Roper, S.C., Milwaukee; Matthew W. O'Neill, Fox O'Neill & Shannon, S.C., Milwaukee*



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### Taxation Law Section

3:15 p.m. - 4:20 p.m.

### The State of AI in Legal Practice: An Update on Ethics and Implementation of AI into Legal Technology

Presented by: State Bar of Wisconsin Practice411 and State Bar of Wisconsin Ethics Program

Understanding and ethically using Generative AI (GAI) are now essential skills for attorneys. As GAI is rapidly integrated into legal tech tools, it is critical to stay informed on its benefits, risks, and related ethical considerations. Explore the latest GAI developments, practical applications, and ethical guidelines for legal professionals, whether you're in private practice, in-house counsel, government, or the court system. Plus, discover the latest GAI products and tools available to legal professionals.

Brent J. Hoeft, State Bar of Wisconsin, Madison; Sarah E. Peterson, State Bar of Wisconsin, Madison

### Trade Policy in a New Administration: Looking Ahead the Next Four Years

Presented by: International Practice Section

Prepare for the economic shifts ahead as the new presidential administration continues to reshape trade policy and regulation. This session offers insights into expected changes in tariffs, agreements, and trade regulations, focusing on their impact on Wisconsin industries. Engage in strategic discussions to anticipate challenges, mitigate risks, and seize new opportunities in the evolving trade landscape.

Evan Y. Chuck, Crowell & Moring LLP, Los Angeles, CA; Ngosong Fonkem, Amundsen Davis LLP, Milwaukee; Steve Hendrix, Hendrix LLC, Waupaca; Robert M. Kossick, Flexport, Inc., Seattle, WA; Jaya Sharma, Sharma Mediation and Arbitration, Madison

### Handling Complex Civil and Commercial Cases: Best Practices for Judges and Lawyers - Session Two

Delve into specialized business and commercial litigation topics, beginning with an analysis of business torts and the economic loss doctrine in cases where a contractual relationship exists between the parties. Understand the intricacies of receiverships, including the appointment process, duties, and implications for stakeholders in financially distressed entities. You'll conclude with a detailed discussion of Wisconsin's distinctive commercial laws and gain valuable insights for navigating the state's unique legal landscape.

Hon. Valerie Bailey Rihn (Ret.), Val Bailey Legal, Madison; Laura A. Brenner, Reinhart Boerner Van Deuren, S.C., Milwaukee; Hon. Jeffrey O. Davis (Ret.), Concurrence ADR LLC, Milwaukee; Hon. William J. Domina, Waukesha County Circuit Court, Waukesha; Hon. R. Michael Waterman, St. Croix County Circuit Court, Hudson

## Friday, June 20

8:00 a.m. - 9:15 a.m.

### PLENARY: A Day in the Life of the Ethics Hotline: Calling All Conflicts

Presented by: State Bar of Wisconsin Ethics Program

Dial in for a lively and interactive session as we pull back the curtain on the ethics hotline in action! Join Tim Pierce and Sarah Peterson as they tackle real-world conflict-of-interest questions, guided by the dynamic narration of Tom Watson and his signature radio voice. From the first morning call to a backlog of voicemails, experience the fast-paced world of ethics inquiries. Audience members can participate by "calling in" with pre-scripted questions, each addressing different aspects of conflicts and other topics. Plus, we'll highlight the limits of the hotline with a question even Tim and Sarah can't



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# CLE PROGRAMS - Continued

answer. Will they hang up? Walk away with a sharper understanding of navigating conflicts in various legal settings while enjoying a uniquely engaging and entertaining presentation.

*Sarah E. Peterson, State Bar of Wisconsin, Madison; Timothy J. Pierce, State Bar of Wisconsin, Madison; Thomas J. Watson, Wisconsin Lawyers Mutual Insurance Co., Madison*

9:30 a.m. - 10:20 a.m.

## Reproductive Rights Update: In Wisconsin and Nationwide

**Presented by: Civil Rights and Liberties Section**

Stay informed on the evolving status of reproductive rights in Wisconsin and across the nation with updates on key litigation, including cases before the Wisconsin Supreme Court and statutory and regulatory developments. Examine impacts on individual rights, patient care, and medical practices while gaining insights into the complex interplay between state and federal law.

*Dr. Abigail S. Cutler, M.D., MSH, University of Wisconsin Department of Obstetrics and Gynecology, Madison; Elizabeth M. Pierson, Pines Bach LLP, Madison; Michelle L. Velasquez, Planned Parenthood of Wisconsin Inc., Milwaukee; Diane M. Welsh, Pines Bach LLP, Madison*

## Discouraging Reckless Driving: Opportunities and Legal Limitations for Communities

**Presented by: Government Lawyers Division and Solo, Small Firm & General Practice Section**

Reckless driving is a growing concern in Wisconsin, prompting debate over enforcement strategies and regulatory solutions. Explore current legal frameworks, emerging approaches like vehicle impoundment

and automated enforcement, and the limitations communities face in implementing these measures. Gain insight into supporting or challenging new regulations, assessing constitutional concerns, policy debates, and political considerations surrounding enforcement technologies.

*Alex Mueller, Milwaukee City Attorney's Office, Milwaukee; Alexander T. Pendleton, Pendleton Legal, S.C., Milwaukee*

## IP Issues for Business Practitioners

**Presented by: Business Law Section**

Business law attorneys frequently encounter intellectual property (IP) issues in formations, acquisitions, and business wind-downs. Get a practical overview of key IP considerations so you can identify and address potential challenges in your daily practice. You'll receive tools to help you spot IP risks early and guide clients through common business transactions with confidence.

*Seep Paliwal, Stafford Rosenbaum LLP, Madison*

10:35 a.m. - 11:25 a.m.

## Children's Data Privacy for Legal Professionals: Balancing Safety and Compliance

**Presented by: Nonresident Lawyers Division**

Delve into the legal challenges surrounding children's access to the internet, from social media and online activities to educational technology. You'll learn to identify crucial issues in agreements, terms and conditions, privacy policies, marketing, and business operations. Understand compliance and risk management to advise clients in the evolving digital age.

*Ryan R. Johnson, Savvas Learning Company, Phoenix, AZ*

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800-444-9404 ext. 6124.

 **Family Law Section**

## Greenwashing & Other Trending Litigation Concerns: Is it Too Easy Being Green?

**Presented by:** Business Law Section and Environmental Law Section

As corporate clients face increasing scrutiny over greenwashing and climate disclosures, attorneys must be prepared to guide them through evolving legal and regulatory challenges. Explore the intersection of business, corporate, and environmental law, with insights from private and government attorneys on transparent advertising, compliance, and risk management. Learn how to help clients navigate sustainability claims while addressing today's most pressing environmental issues.

*Moderator: Benjamin J. Pliskie, Red Oak Law LLC, New Berlin; Panelists: Benjamin Fuchs, Law Offices of Benjamin J. Fuchs, Malibu, CA; Kevin L. Grzebielski, Wisconsin Department of Justice, Madison; Sarah A. Slack, Foley & Lardner LLP, Madison*

## Demystifying Reverse Mortgages

**Presented by:** Bankruptcy, Insolvency & Creditors' Rights Section and Solo, Small Firm & General Practice Section

Reverse mortgages offer homeowners a way to access home equity while continuing to live in their residences without making loan repayments. Receive an overview of reverse mortgages, key regulatory considerations, and their potential role in estate planning and asset protection. Learn how you can help clients leverage this financial tool effectively.

*Mark T. Johnson, Johnson Teigen, LLC, Fitchburg; Daniel J. McGarry, Murphy Desmond, S.C., Madison*

11:40 a.m. - 12:30 p.m.

## PLENARY: The End of Deference? *Tetra Tech, Loper Bright, and Judicial Review of Agency Decisions*

**Sponsored by:** Business Law Section & Labor & Employment Law Section

Mark Twain once quipped, "The report of my death was an exaggeration." Does the same hold true for judicial deference to agency decisions?

Join jurists and scholars on the front lines of judicial review as we explore this question and its future implications. In its 2024 decision in *Loper Bright*, which overturned *Chevron*, the U.S. Supreme Court directed federal courts to rely on standard interpretive tools to determine the meaning of ambiguous statutes rather than deferring to agencies' legal interpretations. But how should judges proceed when Congress is silent or intentionally vague on a particular issue? Wisconsin court decisions may be illustrative of what's to come—the Wisconsin Supreme Court's 2018 decision in *Tetra Tech*, established Wisconsin as a *Chevron*-free zone six years before *Loper Bright*.

Whether you're a judge or an attorney, understand how to navigate the post-*Chevron* landscape and the future of agency deference.

*Moderator: James E. Goldschmidt, Quarles, Milwaukee; Panelists: Hon. Shelley J. Gaylor (Ret.), Dane County Circuit Court, Madison; Hon. Daniel Kelly, New Civil Liberties Alliance, Arlington, VA; Professor James B. Speta, Northwestern Pritzker School of Law, Chicago, IL*



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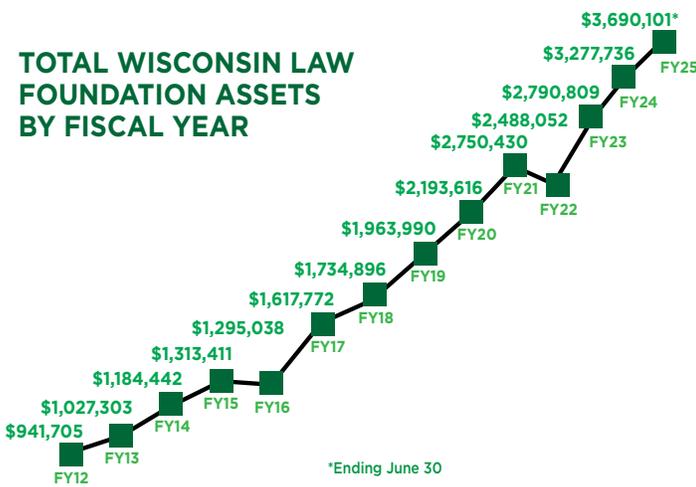


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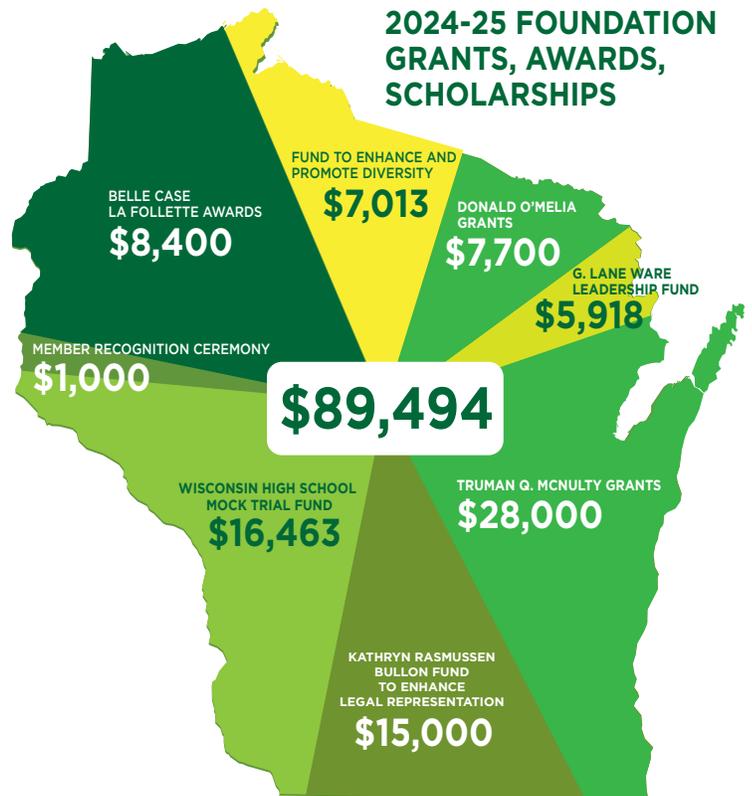
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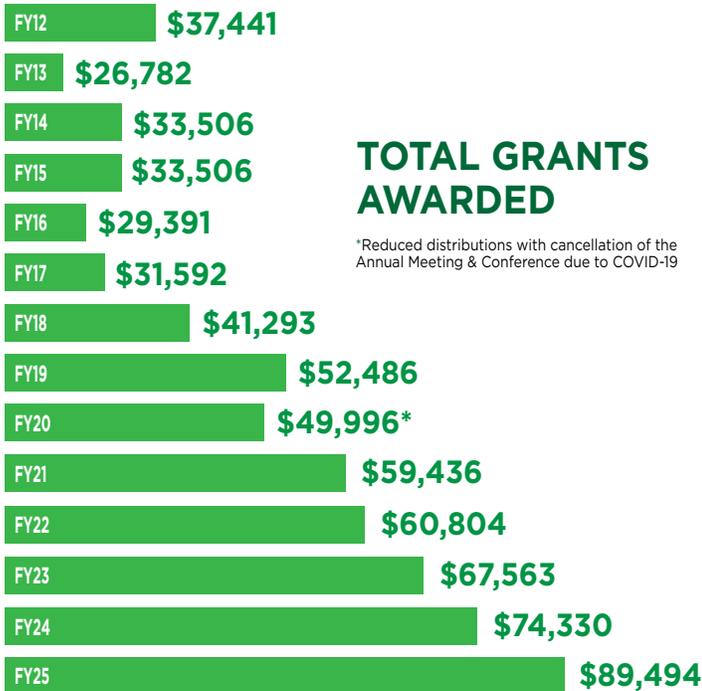


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Josh Gammon, WealthDocket, Greenville, SC

#### Passport to Profit: NIL, Global Law, and the Business of Being Seen

Sivonnia DeBarros, Sivonnia DeBarros Law Firm, Woodstock, IL

#### AI in IP

Bruce E. Boyden, Marquette University Law School, Milwaukee

#### Trademark Protection and Fair Advertising in Social Media

Katrina Hull, Markery Law, Milwaukee

#### Portfolio Management

Moderated by: Alex Lodge  
Carlo Cotrone, Quartal IP, Miami, FL  
Ken Lemke, Brunswick Corporation, Fond du Lac

#### Inside Considerations for Outside Counsel

Jeff Draeger, Intel, Santa Clara, CA; Micky Minhas, Franklin Pierce Center for Intellectual Property, Concord, NH

#### AI and Data Security Panel

Moderated By: William Schultz, Merchant & Gould, Minneapolis; Andrew Lagatta, Merchant & Gould, Minneapolis; Sarah Sargent, Godfrey & Kahn, Milwaukee; Jennifer Urban, Foley & Lardner, Milwaukee

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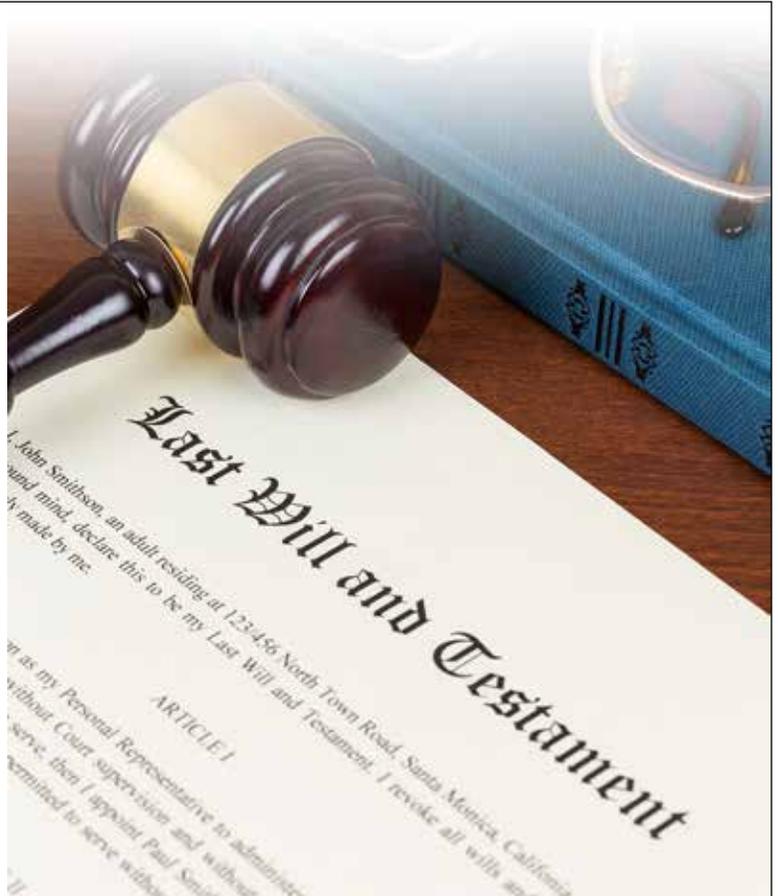
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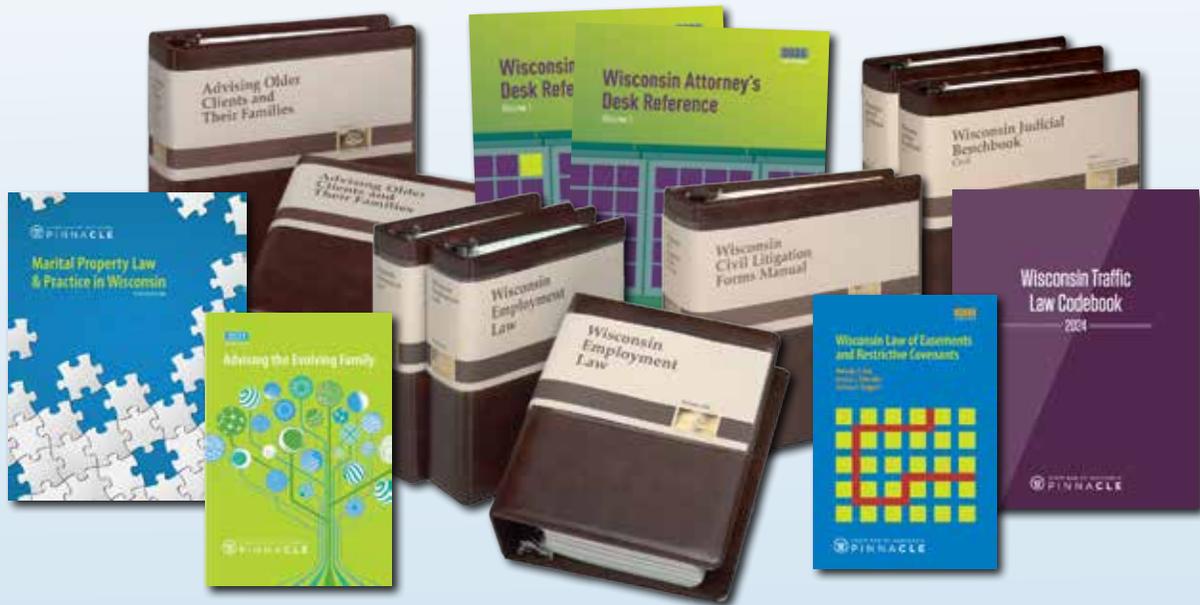
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## State Bar of Wisconsin Intellectual Property and Technology Law

[www.wisbar.org/ip](http://www.wisbar.org/ip)

The Intellectual Property and Technology Law section brings together its members to participate in the presentation of educational seminars in such fields; to further the development

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## State Bar of Wisconsin Labor & Employment Section

[www.wisbar.org/laboremp](http://www.wisbar.org/laboremp)

The Labor & Employment Law Section includes experienced and novice attorneys that regularly (or sometimes) practice in the arena of traditional labor and employment law. It includes all manner of workplace legal issues. The Section offers regular CLE presentations on current issues in labor and employment law, has a listserv, plans social and networking events, and also organizes various labor and employment law programs with the State Bar of Wisconsin's PINNACLE Department.

## State Bar of Wisconsin Litigation Section

[www.wisbar.org/lit](http://www.wisbar.org/lit)

The purpose of the Litigation Section is to bring together members who have an interest in civil litigation, insurance law, and tort law. The Section strives to further the development and improvement of the civil litigation practice by monitoring, commenting upon and proposing legislation, when appropriate, and by sponsoring and presenting CLE programs. The Section has an email list and helps edit and publish educational materials including a litigation blog.

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Wispact Inc. is a private nonprofit organization that administers pooled and community Special Needs Trusts for people with disabilities. Based in Madison, Wispact manages the Special Needs Trusts for more than 4,500 people throughout Wisconsin. For more information, contact: Wispact, 226 Corporate Dr., Madison, WI 53714, Phone: (608) 268-6006, [www.wispact.org](http://www.wispact.org)



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**Administrative & Local Government Law Section**



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