



STATE BAR OF WISCONSIN

PINNACLE



**Practice Law. Manage Business. Enjoy Life.**

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**OCTOBER 25-27, 2018  
KALAHARI RESORT, WISCONSIN DELLS**

# Your Adventure Begins in Wisconsin Dells!



Solo and small-firm attorneys are the aces of the legal world. We're inspired by your bravery and pioneer spirit in piloting your firm. But you shouldn't have to fly solo on your course to success.

That's why we created the Wisconsin Solo & Small Firm Conference. WSSFC is your co-pilot, helping you navigate a smaller firm's everyday challenges.



PRACTICE  
LAW

As a Jack or Jill of many practice areas, you have loads of information to keep up with every day. WSSFC brings together the crucial case law, legal trends, legislative changes, and best practices you need to know from across multiple practice areas. Hear insights from seasoned practitioners and renowned presenters.



MANAGE  
BUSINESS

When it's time to chart your course, WSSFC has the essential strategies and time-tested tactics to keep your firm flying high. Find out what works - and what doesn't - for other lawyers like you. Plus, visit exhibitors at the Legal Expo for all the latest tools, services, and ideas for your practice.



ENJOY  
LIFE

You need a community of support to succeed - and you'll find it at WSSFC. Share the sky with outstanding fellow attorneys and make some new friends. Learn how you can live well, work smarter, and reduce stress. Let the beauty of Wisconsin Dells help you unwind and relax with family, friends, and colleagues.

## Why WSSFC?

- Dive into CLE topics you won't find anywhere else
- Experience 6 plenaries and 32 breakout sessions
- Receive more content for less cash
- Enjoy extensive networking and increase your referral sources
- Get tools and resources that rock
- Treat yourself to a few fun days away from the office

## Wonderful Wisconsin Dells

Wisconsin Dells is one of the oldest resort areas in the state. Founded in 1856, this city has become the Waterpark Capital of the World and is home to a huge variety of family-friendly attractions. Take a stroll through Wisconsin Dells' historic downtown or check out some of the unique, iconic area attractions:

- Wisconsin Ducks Dells Tours
- Circus World Museum
- Wisconsin Dells Trolley Tours
- Wollersheim Winery & Distillery
- Port Huron Brewing Company
- Bigfoot Zipline Tours
- Ripley's Believe It Or Not Museum

Visit [www.wisdells.com](http://www.wisdells.com) to learn more.

## Did You Know?

- Surplus army land and water vehicles (ducks) first appeared in the area in 1946. These unique half truck-half boat vehicles have taken tours through Wisconsin Dells' famous rock formations for more than 70 years.
- Wisconsin Dells has more configurations of indoor and outdoor waterparks per capita than anywhere else in the world.
- Wisconsin Dells comes from the Native American word "Meskousing" (where the waters gather) that was later known by the French spelling "Ouisconsin." This word later became "Wisconsin."
- From 1865 to 1908, H.H. Bennett photographed the rugged landscape of his beloved Wisconsin Dells and became one of the premier landscape photographers of the era.



## Reserve your room by September 24 to ensure best rates and availability.

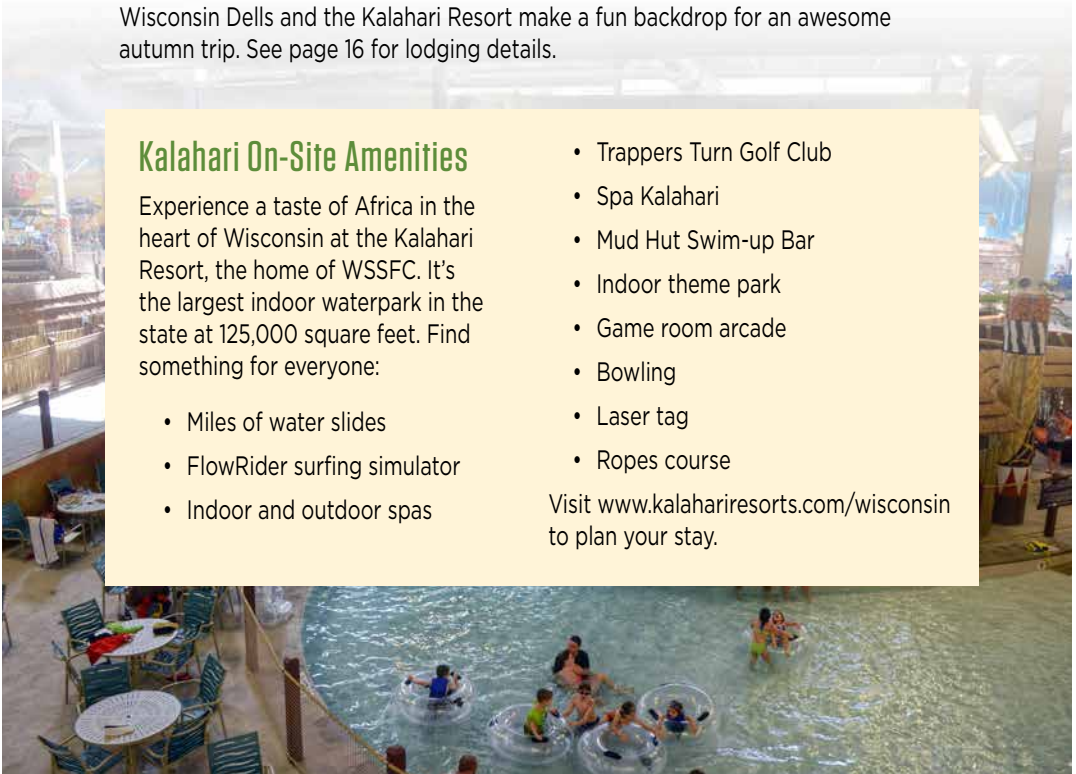
Mention you're with the Wisconsin Solo & Small Firm Conference during booking for the reduced conference rate. Whether you're by yourself or bringing the family, Wisconsin Dells and the Kalahari Resort make a fun backdrop for an awesome autumn trip. See page 16 for lodging details.

### Kalahari On-Site Amenities

Experience a taste of Africa in the heart of Wisconsin at the Kalahari Resort, the home of WSSFC. It's the largest indoor waterpark in the state at 125,000 square feet. Find something for everyone:

- Miles of water slides
- FlowRider surfing simulator
- Indoor and outdoor spas
- Trappers Turn Golf Club
- Spa Kalahari
- Mud Hut Swim-up Bar
- Indoor theme park
- Game room arcade
- Bowling
- Laser tag
- Ropes course

Visit [www.kalahariresorts.com/wisconsin](http://www.kalahariresorts.com/wisconsin) to plan your stay.



# Special Events

## THURSDAY, OCTOBER 25

### Lunch in the Legal Expo

11:55 a.m. - 12:55 p.m.

**Sponsored by Habush, Habush & Rottier, S.C. and FindLaw**



Celebrate the grand opening of the Expo Hall at this energizing event. Lunch will be provided for all registrants - no need to register separately. It's the perfect opportunity to meet new friends, check out the many products and services on display at the Expo, and start filling out your Passport to Prizes.

### Silent Auction Benefitting Legal Action of Wisconsin

*All day Thursday*

Bid on a wide variety of items in the Legal Expo throughout the day on Thursday at this silent auction organized by the Solo/Small Firm & General Practice Section. Winning bidders will be announced Friday morning. All proceeds will go to Legal Action of Wisconsin which provides free legal services to low-income populations.

### Professional Portrait Opportunity

11:30 a.m. - 6:30 p.m. *Thursday*

Have your photo taken by a professional while checking out the Expo Hall. The Solo Small Firm and General Practice section has arranged for Lee Larsen Photography to provide professional quality photos at an affordable price for use in your website and other materials. Be sure to bring a suit or professional attire for this opportunity - your portrait will reflect the image that you want to portray. Sign-ups for a photo session will be available at the photo booth.

### Attendee Reception

5:00 - 6:30 p.m.

**Sponsored by West Bend Mutual Insurance and Wisconsin Lawyers Mutual Insurance Company**

After a busy day, slow down and start making new connections while enjoying beer, wine, soda, hors d'oeuvres, and a cash bar in the Legal Expo.

Visit with exhibitors as you browse new technologies and resources for your firm. Don't forget to have your Passport to Prizes signed by each exhibitor to be entered into a drawing for amazing prizes.

### Dine-Arounds

*Starting at 6:30 p.m.*

Let us take care of your Thursday night dinner reservations when you sign up for a dine-around. Enjoy stimulating conversation over a delicious meal while making new friends. Participants pay their own way. Spouses or significant others are welcome, but please plan to leave the kids at the hotel.

Each dine-around will be hosted by a WSSFC speaker or planning committee member and will take place at top-notch restaurants in Wisconsin Dells, including:

- Double Cut Charcoal Grill
- Wisconsin Brew Pub
- Sprecher's Restaurant & Pub
- The Del Bar
- Copper Oak Steak House at Ho Chunk Casino

Eventbrite signups for each dine-around will be posted to [www.wssfc.org](http://www.wssfc.org) and the WSSFC Facebook group on Tuesday, August 21. Sign up early - last year's dine-arounds filled up quickly.





## FRIDAY, OCTOBER 26

### Deluxe Continental Breakfast

7:45 - 8:45 a.m.

**Sponsored by Hupy and Abraham, S.C.**

Start your day off right with a hearty breakfast. Fuel up for a fast-paced day of learning and fun!

### Lederer Award Presentation and Networking Lunch

Noon - 1:45 p.m.

**Sponsored by State Bar of Wisconsin Real Property, Probate & Trust Law Section**



Spend time getting to know fellow attendees while cheering on the 2018 Lederer Award winner. Named in memory of attorney John Lederer, the Lederer Award is presented annually to an individual, group, or organization exemplifying his leadership, spirit, and dedication.

Lederer was instrumental in creating WSSFC and saw it as an opportunity to better the practices and lives of Wisconsin's attorneys. He was also a visionary when it came to integrating technology into the practice of law.

Award winners are selected based on their sustained, selfless service to projects, efforts, or organizations that benefit solo and small-firm practitioners across Wisconsin. They also contribute to the advancement of solo and-small firm practitioners in technology, legal education, practice management, ethics, or quality of life.

### Legal Expo

Check out the Legal Expo between sessions to complete your Passport to Prizes. Learn about products and services designed just for solo and small-firm practitioners - and don't forget to have your Passport signed by each exhibitor you visit for the chance to win great prizes!



### Passport to Prizes Winners

1:30 - 1:45 p.m.

Prize winners will be announced in the Legal Expo after the networking luncheon. Come see if you are one of the lucky winners. You need not be present to win.

### Hospitality Suite

5:00 - 6:30 p.m.

**Sponsored by Krekeler Strother, S.C. and Smith Keane LLP**

On Friday evening, the fun doesn't stop. Join your colleagues in the Hospitality Suite for wine, beer, and refreshments. There are even free prize drawings. It's THE place to be.

### Ultimate Pass Gold Is Your Ticket to WSSFC

Attend WSSFC 2018 for FREE when you purchase an Ultimate Pass Gold! This powerful pass gives you free access to State Bar of Wisconsin conferences, institutes, and CLE seminars. It also includes free tuition to the Health, Labor, and Employment Law Institute and the Annual Meeting & Conference.

With one annual fee, get free WSSFC tuition PLUS unrestricted access to our complete PINNACLE® CLE offerings including live sessions, webcast replays, telephone seminars, and OnDemand sessions.

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



# Conference Schedule

THURSDAY – October 25, 2018	
Time	Event
8 a.m. - 5 p.m.	Conference Registration
8 - 8:30 a.m.	Continental Breakfast. <i>Compliments of Hupy and Abraham, S.C.</i>
8:30 - 10:25 a.m.	<b>Opening Plenary:</b> Negotiation Origami: Five Key Skills to Improve Your Negotiation Effectiveness
10:25 - 10:40 a.m.	Refreshment Break
10:40 - 11:55 a.m.	<b>Plenary:</b> Women in the Law: A Candid Discussion
11:55 a.m. - 12:55 p.m.	Legal Expo Grand Opening. Lunch compliments of Habush, Habush & Rottier, S.C. and FindLaw
1 - 2:30 p.m.	<b>Plenary:</b> What You Need to Learn NOW to Be Ready For 2023
2:30 - 2:55 p.m.	Refreshment Break – visit the Legal Expo and get your passport signed to be entered to win great prizes!
2:55 - 3:45 p.m.	Management of Client Intake in Elder Law
	Onboarding Done Right - Keep That New Employee Happy & Productive!
	We've Been Hit! Common Threats, Best Practices, and What to do When Ransomware Strikes
	Setting Proper Client Boundaries: Helpful Tips, Apps, and Wellness Advice
3:45 - 4:10 p.m.	Refreshment Break – visit the Legal Expo and get your passport signed to be entered to win great prizes!
4:10 - 5 p.m.	Brain Compatible Content: How to Create Messages That Parallel the Brain's Processing of Information
	Urban Pioneers: Bridging the Gap from Law School to Rural Practice
	Cyber Insurance 101: What You Need to Know to Protect Your Practice
	Expanding Your Practice Ethically: Tips and Traps
5 - 6:30 p.m.	Attendee Reception in the Legal Expo. Enjoy complimentary hors'doevres, beer, wine, and soda. <i>Sponsored by WILMIC and West Bend Mutual Insurance Co.</i> Cash Bar also available.
6:30 p.m.	Optional Dine Arouds - sign-up required.

FRIDAY – October 26, 2018	
Time	Event
7:45 a.m. - 1:45 p.m.	Legal Expo is Open - Today is your last chance to meet with companies that can help your practice.
7:45 a.m. - 4 p.m.	Conference Registration - Be sure to sign in each day!
7:45 - 8:45 a.m.	Deluxe Continental Breakfast - <i>Compliments of Hupy and Abraham, S.C.</i>
8:45 - 10:15 a.m.	<b>Plenary:</b> Taming the Digital Chaos! Time, Task, Email & Distraction Management
10:15 - 10:45 a.m.	Refreshment Break - Last chance to visit the Legal Expo and get your passport signed to enter to win great prizes!
10:45 a.m. - 12 p.m.	The Dreaded "B" Word – Bankruptcy Basics for the General Practitioner, Trivia Style
	Own Your Practice – Without it Owning You
	Extreme Makeover: Law Firm Website Edition
	An Ethics Fee for All



12 - 1:45 p.m.	Networking Luncheon and Presentation of the 2018 Lederer Award. <i>Luncheon sponsored by the Real Property, Probate &amp; Trust law Section.</i>
1:30 - 1:45 p.m.	Feeling lucky? Passport to prizes and exhibitor drawing winners will be announced in the Expo Hall after lunch.
1:45 - 2:35 p.m.	Intellectual Property Law for Business Owners
	Building your Solo and Small-Firm Attorney Dream Team
	The Mobile Lawyer Toolkit
	Oh What Tangled Webs We Weave... Ethical Dilemmas in Estate Planning
2:50 - 3:40 p.m.	Disclosures, Deeds, and Other Dirt
	Establishing a Compensation Structure for Associates and Staff
	PDF Essentials: What Lawyers Need to Know and Why
	A Roadmap to Behavioral Change
4:05 - 4:55 p.m.	Navigating HR Myths and Landmines - What Every Nonemployment Lawyer Should Know
	50 Tips in 50 Minutes
	Can I Survive For a Day... Using ONLY My iPad?
	Your Pre-Flight Checklist for an Organized Practice
5 - 6:30 p.m.	Hospitality Suite – Enjoy wine and refreshments. <i>Sponsored by Krekeler Strother, S.C. and Smith Keane LLP (Dinner on your own)</i>

<b>SATURDAY – October 27, 2018</b>	
<b>Time</b>	<b>Event</b>
7 - 10:50 a.m.	Conference Registration – Be sure to sign in each day!
7 - 8 a.m.	Continental Breakfast - <i>Compliments of Hupy and Abraham, S.C.</i>
7:30 - 8:20 a.m.	<b>Plenary:</b> Gadgets, Gizmos, and Widgets
8:30 - 9:20 a.m.	10 Ways to Contest a Will, Trust, or Pre-Death Transfer and Prevent a Contest
	Culture Chicken, Brand Egg - Which Comes First?
	What You Didn't Know MS Word Can Do
	Taking the Leap: Practical Matters in Running a Solo Practice
9:20 - 9:50 a.m.	Break/Hotel Check-out
9:50 - 10:40 a.m.	Achieving Success in Sexual Harassment Cases: A Plaintiff Lawyer's Perspective
	Five Steps to a Successful Law Firm Succession Plan
	Document Automation Made Easy: Tips, Tricks, and Tools for Everyone
	Interactive Ethics: What Would YOU Do?
10:50 a.m. - 12:15 p.m.	<b>Plenary:</b> The Top Six Things Solos and Small Firms Can Do to Avoid Disciplinary and Malpractice Claims
12:15 p.m.	Conference Concludes - Thank You - See you next year!



**Thanks to Digital Intelligence for sponsoring the Technology Track!**

THURSDAY, OCTOBER 25

## OPENING PLENARY

8:30 - 10:25 a.m.

### Negotiation Origami: Five Key Skills to Improve Your Negotiation Effectiveness



The most effective negotiators use a variety of skills and techniques depending on the context, their negotiation counterpart, and the client. Want to add their methods to your own negotiation toolbox? Become a more successful negotiator by learning how to develop and use:

- Assertiveness
- Empathy
- Flexibility
- Social intuition
- Ethicality

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

## PLENARY

10:40 - 11:55 a.m.

### Women in the Law: A Candid Discussion

If you know, employ, work with, or are a female lawyer, don't miss this lively panel discussion tackling the issue of women leaving the legal profession in growing numbers.

Gain a blueprint to strengthen your firm and support every member of your team with insights on:

- How women's roles have evolved
- Present-day communication styles
- Firm cultures
- Overcoming unconscious and perceived biases
- Strategies to attract and retain top female talent

*Gail C. Groy, Axley Brynerson LLP, Madison*

*Ann S. Jacobs, Jacobs Injury Law S.C., Milwaukee*

*Hon. JoAnne F. Kloppenburg, Wisconsin Court of Appeals District IV, Madison*

*Stephanie L. Melnick, Melnick & Melnick SC, Mequon*

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

## PLENARY

1:00 - 2:30 p.m.

### What You Need to Learn NOW to Be Ready For 2023

So much has changed since 2013. Same-sex marriages became legal in Wisconsin. Limited scope representation rules were created. Wisconsin lawyers couldn't get enough CLE about how the Affordable Care Act exchanges would impact their practices. Social media was here to stay—and could make or break your case.

Where do you think your practice will be in another five years? Predicting the future is no easy feat. Planning for it can be just as tough. What should you be doing today to prepare your practice for 2023?

This fast-paced, TED-inspired plenary brings together eight practitioners who will show you where law practice is headed and how to stay ahead of the curve. Each presenter will deliver a succinct synopsis of their insights - so be ready to absorb plenty of information!

Explore the future of:

- Competing against a growing number of DIY legal services
- Transforming attorney-client relationships
- The shift to virtual law practice
- How clients will pay their legal bills
- The growing importance of self-care
- Evolving ethics issues and rules
- And much more

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

*Hon. Daniel Kelly, Wisconsin Supreme Court, Madison*

*Aviva Meridian Kaiser, State Bar of Wisconsin, Madison*

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

*J. David Krekeler, Krekeler Strother, S.C., Madison*

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

*Odalo J. Ohiku, Law Office of Odalo J. Ohiku, Milwaukee*

*Thomas J. Watson, Wisconsin Lawyers Mutual Insurance Co., Madison*

*Shannon Yocum, LawPay, Austin, TX*





2:55 - 3:45 p.m.

## Substantive Track

### Management of Client Intake in Elder Law

Effective elder law client intake identifies and addresses a client's main objectives, helping worried, uncertain clients feel secure and satisfied. Attend this session to improve your intake process with:

- Specialized intake outlines and checklists for elder law issues
- Tailored questions to increase your intake efficiency
- Advice for establishing trust through sensitivity
- Tips for providing practical and cost-effective service

*Kate Knowlton, Knowlton Law Group LLC, Wauwatosa  
Pat Jenkins, RN, BSN, MS, Care Coordinator (retired),  
Minneapolis*

## Practice Management Track

### Onboarding Done Right - Keep That New Employee Happy & Productive!

Give your new employee the introduction they deserve. The key to a great onboarding experience is in your systems. Discover how you can ensure your new team member:

- Is indoctrinated with your culture and norms
- Is building the right relationships and skills
- Knows what to do, what your expectations are, and how their performance will be measured
- Has a great start with the rest of the team

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

## Technology Track

### We've Been Hit! Common Threats, Best Practices, and What to do When Ransomware Strikes

Know why hackers have been using ransomware since 2005? Because companies continue to be fooled by and fall victim to it. Is your law firm prepared to repel hackers and damaging cyberattacks?

Explore the common security threats

targeting your law firm's sensitive information. Learn why it's essential to go beyond technology solutions and properly train the humans in your firm. Plus, find out how to weather the storm if, despite best efforts, your firm is hit with ransomware.

*Brent J. Hoeft, Hoeft Law LLC, Madison*

## Quality of Life/Ethics Track

### Setting Proper Client Boundaries: Helpful Tips, Apps, and Wellness Advice

Where do you draw the line between serving your clients and maintaining a healthy work-life balance? Setting appropriate boundaries at the very first client meeting helps ensure suitable limits for your role in the representation. Discover practical tools and techniques for setting realistic boundaries with your clients.

*Christopher C. Shattuck, State Bar of Wisconsin,  
Madison*

*Mary Spranger, State Bar of Wisconsin, Madison*

4:10 - 5:00 p.m.

## Substantive Track

### Brain Compatible Content: How to Create Messages that Parallel the Brain's Processing of Information

Learn how to create text communication that engages readers, builds accurate understanding and can be easier to recall. In this session, you'll discover how to improve your communication using Cognitive-based Information Design (CID) - a technique that presents information the way our brains actually process information.

Imagine the advantages:

- Low-stress emails that avoid cognitive overload
- Communication that builds trust through transparency with clients provides clarity for judges & juries

Preview CID in action at [thecidgroup.com](http://thecidgroup.com).

*Phil Ransom, The CID Group, LLC, Milwaukee*

*W. Lou Tetlan, Ph.D., The CID Group, LLC, Milwaukee*

# CLE Programs & Events

**(4:10 - 5 p.m. continued)**

## Practice Management Track

### Urban Pioneers: Bridging the Gap from Law School to Rural Practice

Rural Wisconsin is in dire need of lawyers. The State of Wisconsin, the State Bar, and Wisconsin's two law schools want to do something about it. Hear from a panel of practicing lawyers in Tomah and Monroe along with the University of Wisconsin Law & Entrepreneurship Clinic as they discuss:

- How to attract young lawyers to rural practice
- How to prepare your firm to support young lawyers
- New initiatives at the University of Wisconsin

*Jeffrey M. Glazer, U.W. Law & Entrepreneurship Clinic, Madison*

*Penny J. Precour, Mubarak and Precour, S.C., Tomah*

*Todd W. Schluesche, Kittelsen, Barry, Wellington, Thompson & Schluesche, S.C., Monroe*

## Technology Track

### Cyber Insurance 101: What You Need to Know to Protect Your Practice

When your best-laid cyberattack preventions fail, it's cyber insurance to the rescue! Discover why cyber insurance is becoming affordable, commonplace, and the smart choice to protect your practice. Learn the basics of cyber insurance policies, including key coverage terms, conditions, and exclusions.

In addition, explore various types of coverage for liability, regulatory fines, extortion, business interruption, breach response, and more.

*Tom Widman, Identity Fraud, Inc., Walnut Creek, CA*

## Quality of Life/Ethics Track

### Expanding Your Practice Ethically: Tips and Traps

Ready to grow? Make sure you do it right. Understand the ethical issues of enlarging your practice through referrals and new practice areas. Explore the ethics of:

- Jointly representing a client
- Referring a prospective client to another attorney
- Discussing representation with a potential client
- Creating an attorney-client relationship

*Dean R. Dietrich, Ruder Ware, L.L.S.C., Wausau*

*Timothy J. Pierce, State Bar of Wisconsin, Madison*

## FRIDAY, OCTOBER 25

### PLENARY

8:45 - 10:15 a.m.

### Taming the Digital Chaos! Time, Task, Email & Distraction Management



Emails. Instant messages. Phone calls. Walk-in interruptions. Social media notifications. The average American worker is interrupted every 2-3 minutes. Do you feel like you work a 14-hour day but only have a few billable hours to show for yourself by 5 p.m.?

Learn the habits and techniques to make technology your servant (not the other way around) and gain control of your work day and personal life. Discover the skills to become more focused and less overloaded with techniques to:

- Deal with distraction
- Manage your time
- Efficiently organize your tasks
- End the endless emails
- Make Outlook do more for you
- Automate documents and processes

*Paul J. Unger, Affinity Consulting Group, Columbus, OH*

## 10:45 a.m. - 12:00 p.m.

### Substantive Track

### The Dreaded "B" Word - Bankruptcy Basics for the General Practitioner, Trivia Style

This fun, fast-paced trivia competition uses real-world scenarios to teach you the basics. Gather a group of colleagues to play as a team or go solo. Prizes will be awarded to the top three winners!



Receive an overview of chapters of bankruptcy; what to look for in the notice of bankruptcy filing; key players; automatic stays; how your clients can exercise and protect their rights; discharge of debts; and exceptions to dischargeability.

*Eliza M. Reyes, Krekeler Strother S.C., Madison*  
*Jennifer M. Schank, Fuhrman & Dodge, S.C., Middleton*

## Practice Management Track

### Own Your Practice - Without it Owning You

Almost every law practice fits into one of three mindsets: Great Lawyer, Practice Growth, or Market Leader. These mindsets are so powerful that they actually dictate what you can and can't accomplish in your firm.

Making the commitment to a new mindset can help you build your practice without grinding yourself into dust. Learn about the three major law firm mindsets and how changing yours can create a world of new opportunities.

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

## Technology Track

### Extreme Makeover: Law Firm Website Edition

Is anyone visiting your website? Did you know Google is pushing non-mobile-ready websites down in search rankings? Do you have unintentional ethical violations lurking on your site? Come to this session for an extreme makeover! Learn about:

- Elements of a good law firm website
- What should and shouldn't be on your site
- How to make your site appealing
- How to work with a web designer to make it a reality

*Catherine Sanders Reach, Director of Law Practice Management & Technology, Chicago Bar Association, Chicago, IL*

## Quality of Life/Ethics Track

### An Ethics Fee for All

It's back by popular demand! Attorney fees are a minefield of ethical missteps that you need to anticipate. How do you ensure you

get paid for the work you perform while complying with the Rules of Professional Conduct?

This panel discussion will help you navigate 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, and more.

*Brian C. Anderson, Wisconsin Lawyers Mutual Insurance Co., Madison*

*Aviva Meridian Kaiser, State Bar of Wisconsin, Madison*  
*J. David Krekeler, Krekeler Strother, S.C., Madison*

**1:45 p.m. - 2:35 p.m.**

## Substantive Track

### Intellectual Property Law for Business Owners

Who owns your firm's logo? What about your web content? Learn to spot the most common intellectual property (IP) issues business owners like you and your clients face. The presenters will discuss the distinctions between different forms of IP and the protections afforded by each. Plus, learn proactive strategies to prevent ownership disputes when employees or vendors create IP for a business.

*Garet K. Galster, Smith Keane LLP, Hartland*

*Melissa A. Spindler, Smith Keane LLP, Hartland*

## Practice Management Track

### Building Your Solo and Small-Firm Attorney Dream Team

Attending a conference like WSSFC is about more than simply getting your required CLE credits. It's about building and strengthening your connections – creating a team of fellow practitioners you can turn to when the need arises. This panel discussion will give you a game plan of actions to take before, during, and after events just like this one to build your solo and small-firm dream team.

*Timothy J. Cody, Daniels & McAvoy, S.C., Appleton;*

*Erin R. Ogden, Ogden Glazer + Schaefer, Madison*

*Spencer X. Smith, Spencer X. Smith Consulting, Waunakee*

# CLE Programs & Events

**(1:45 - 2:35 p.m. continued)**

## Technology Track

### The Mobile Lawyer Toolkit

What do a law office, home office, car, courtroom, meeting space, coffee shop, and law library have in common? Thanks to today's technology, they're all places you can work. In fact, practicing while mobile is a necessity for today's lawyers. Come learn the tools and tricks that make practicing on-the-go easier and more efficient.

*Brent J. Hoeft, Hoeft Law LLC, Madison*

*Christopher C. Shattuck, State Bar of Wisconsin, Madison*

## Quality of Life/Ethics Track

### Oh What Tangled Webs We Weave ... Ethical Dilemmas in Estate Planning

Feeling tripped up by ethical complexities in estate planning? Learn how to untangle common ethical conundrums by understanding who the client is, the client's best interests, and confidentiality. In addition, receive helpful advice for dealing with conflicts between spouses, attorney's fees and retainers, and withdrawing from the representation.

*Elizabeth Ruthmansdorfer, Moertl, Wilkins & Campbell, S.C., Milwaukee*

**2:50 - 3:40 p.m.**

## Substantive Track

### Disclosures, Deeds, and Other Dirt

The next time someone approaches you at a party with a real estate question, be ready with this real estate cocktail. We'll muddle together some condition disclosures, add a jigger of easements and, after obtaining electronic consent, fill with deed considerations. Partition into two glasses and add olive juice.

We'll discuss:

- Easements
- Authentication and electronic signatures
- Seller and real estate licensee disclosure requirements

- Partitions and declaratory judgments
- Escalation clauses
- Inspections vs. testing

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

## Practice Management Track

### Establishing a Compensation Structure for Associates and Staff

Once you have the right people on your bus, how do you establish a compensation structure that's fair, competitive, and motivating? Find out where to start in establishing a compensation structure for your team.

Discover how to set a formula for associates to ensure that compensation is commensurate with production. Learn how to help your team set and meet billable goals. Plus, see how a combination of base plus performance provides great motivation.

*J. David Krekeler, Krekeler Strother, S.C., Madison*

*Sarah L. Ruffi, Ruffi Law Offices S.C., Wausau*

## Technology Track

### PDF Essentials: What Lawyers Need to Know and Why

PDF is the file format of choice for exchanging documents with clients, other lawyers, and the courts. Learn how to work with PDF files more effectively by understanding metadata removal, document security, redaction, Bates numbering, collaboration features, and the pros and cons of different PDF applications.

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

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

## Quality of Life/Ethics Track

### A Roadmap to Behavioral Change

The stresses of law practice can lead to chronic pain, injury, and depression. Deciding to take better care of yourself starts with changing your behavior. This session provides a roadmap for setting your own health-related goals and techniques for addressing setbacks. Presenter Hope Wood combines her master's degree in health studies with her personal experience as an attorney to give you the tools to make the necessary changes for a lifetime of less stress.

*Hope Wood, Hope Wood JD, PLLC, Des Moines, IA*



4:05 - 4:55 p.m.

## Substantive Track

### Navigating HR Myths and Landmines - What Every Nonemployment Lawyer Should Know

Help your business clients spot and avoid high-risk employment matters. Attend this session to learn the basics of employment law compliance and HR practice. Discover the riskiest employment law issues for companies, and walk away with practical HR tips for managing those situations when they arise.

You'll learn from a presenter with more than 20 years of employment law experience as outside counsel, inside counsel, and employment attorney mediator.

*Jill Hamill Sopha, Sopha Mediation LLC, Pewaukee*

## Practice Management Track

### 50 Tips in 50 Minutes

It's a WSSFC favorite. Hear dozens of practical tips and tricks for getting things done better, faster, and maybe even cheaper in this fast-paced, dynamic session. Panelists will share insights and techniques you can start using right away. Don't miss it!

*Brent J. Hoeft, Hoeft Law LLC, Madison*

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

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

*Catherine Sanders Reach, The Chicago Bar Association, Chicago, IL*

*Christopher C. Shattuck, State Bar of Wisconsin, Madison*

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

*Spencer X. Smith, Spencer X. Smith Consulting, Waunakee*

## Technology Track

### Can I Survive For a Day ... Using ONLY My iPad?

The answer is yes! Discover how to use your iPad to:

- Access the court's digital order entry system from the courtroom
- Retrieve rules and research
- Compile your research into briefs
- Manage your calendar and contacts
- Write and edit documents in Microsoft Word
- And so much more

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

## Quality of Life/Ethics Track

### Your Pre-Flight Checklist for an Organized Practice

Feeling grounded by too much work, too little time, or just a disorganized mess? Take flight with a treasure trove of helpful checklists, flowcharts, and processes that will put you back on course. A pilot and a methodologist team up to provide examples, tips, and tricks on how to fly into the clear blue sky of a more organized practice.

*Erin R. Ogden, Ogden Glazer + Schaefer, Madison*

*Ryan R. Seib, Horn & Johnsen, S.C., Madison*

## SATURDAY, OCTOBER 26

### PLENARY

7:30 - 8:20 a.m.

### Gadgets, Gizmos, and Widgets

Whether you want tips for getting more from your favorite gadgets or are looking for the coolest gizmos to put on your Christmas list, don't miss this conference favorite! Discover how you can maximize your gizmos and gadgets to make your law practice and your life easier. 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*

# CLE Programs & Events

8:30 - 9:20 a.m.

## Substantive Track

### 10 Ways to Contest a Will, Trust, or Pre-Death Transfer and Prevent a Contest

That's final ... or is it? Learn how to challenge or contest a will, trust, gift, or beneficiary designation after the decedent's death. Explore the difference between medical and legal competency to execute and complete various transactions. Understand the tests for undue influence, and look at other claims that can be made over the decedent's assets after death. Plus, discover what drafters can do to reduce the likelihood of contests.

*Alexander L. Ullenberg, Ullenberg Law Offices S.C., Fond du Lac*

## Practice Management Track

### Culture Chicken, Brand Egg - Which Comes First?

A company's culture is critical to its success; so is its brand. But which comes first? Look at real-world examples of established and startup companies that have succeeded (or failed) in creating a strong company culture and brand.

Uncover the secrets to building a culture aligned with your corporate mission, embraced by your employees, and completely true to who you are and the way you do business.

*D.P. Knudten, COLLABORATOR Creative, Madison*

## Technology Track

### What You Didn't Know MS Word Can Do

Lawyers spend much of their days in the ubiquitous word processor, Microsoft Word. But familiarity can breed contempt. Come find out tips, techniques, and add-ons to stop fighting with documents and make them work for you instead!

Learn easy ways to master formatting, pagination, and document automation. Explore collaboration, versions, and permissions through Office 365. And discover powerful add-ons to make your writing clear, concise, and error-free.

*Catherine Sanders Reach, Director of Law Practice Management & Technology, Chicago Bar Association, Chicago, IL*

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

## Quality of Life/Ethics Track

### Taking the Leap: Practical Matters in Running a Solo Practice

You've taken the leap (or want to) to start a solo practice. Once the decision is made, there are many more choices to consider as you set up shop. Discover what's worked (and what hasn't) for others who've taken the leap. As requested by last year's attendees, this guided roundtable session offers in-depth discussion on:

- Client management
- Scheduling
- Finding new clients
- Avoiding isolation
- Deciding whether to hire support staff

*William Bratcher, Bratcher Law Office LLC, Thorp*  
*Kimberly A. Henderson, Henderson Law Office, West Salem*

*Aiden Tharp, Williamson & Siler S.C., New Richmond*  
*Sarah Slice Yacoub, Slice Law Inc., Hudson*

9:50 - 10:40 a.m.

## Substantive Track

### Achieving Success in Sexual Harassment Cases: A Plaintiff Lawyer's Perspective

Receive an overview of sexual harassment law and practice tips from a plaintiffs' lawyer. Learn how to:

- Choose good cases
- Gather pre-suit information
- Navigate procedural requirements
- Manage discovery
- Defeat summary judgment
- Anticipate settlement and trial issues

*Amy F. Scarr, Amy F. Scarr S.C., Madison*



## Practice Management Track

### Five Steps to a Successful Law Firm Succession Plan

You love practicing law as a solo/small-firm lawyer, but whether you'd want to or not, you can't do it forever. It's essential to find someone who can take over for you and prepare them to do so – even if you don't think you'll need a replacement for quite some time. This session walks you through the process from start to finish and discusses the five components found in every successful succession plan.

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

## Technology Track

### Document Automation Made Easy: Tips, Tricks, and Tools for Everyone

It's time to take your practice to the next level and make your life easier at the same time with tools for automating document production. Find out how to use tools already present in MS Word and WordPerfect. Plus, learn about third-party tools that can simplify the automation of more complex documents while helping you avoid the malpractice risks of search and replace.

*Michael F. Brennan, The Virtual Attorney, Lake Villa, IL*  
*Nerino J. Petro, Jr., The Erickson Group, Belvidere, IL*

## Quality of Life/Ethics Track

### Interactive Ethics: What Would YOU Do?

Bring your cell phone, tablet, or laptop with you to vote on what you think is the right call to make in various ethical conundrums. The presenters will then go through each example to discuss it within the context of what is moral and what is allowable under the Rules of Professional Conduct. Walk away feeling more confident to face your next ethical issue.

*Kate R. Kruse, Mitchell Hamline School of Law, St. Paul, MN*

## CLOSING PLENARY

10:50 a.m. - 12:15 p.m.

### The Top Six Things Solos and Small Firms Can Do to Avoid Disciplinary and Malpractice Claims



In a solo or small firm, the practitioner is responsible for everything – marketing, obtaining clients, servicing clients, billing, collecting fees, and managing finances. On top of that, they must keep up with their primary practice area, understand new technology, and try not to post anything wrong on social media. And they do it all without the support and resources typically available in larger firms that offer protection from professional liability mistakes.

The good news is: help is here! This session will help you assess your own propensity for professional liability risks plus give you six solid strategies to mitigate those risks. Learn effective tactics for:

- Managing your practice
- Maintaining competency
- Managing client relationships
- Managing client funds
- Engaging in social media
- Protecting your well-being

*Allison L. Wood, Legal Ethics Consulting, P.C., Chicago, IL*

# Lodging Information



Kalahari Resort &  
Convention Center  
1305 Kalahari Drive  
Wisconsin Dells, WI 53965

[www.kalahariresorts.com/wi](http://www.kalahariresorts.com/wi)

(877) 253-5466

## Reduced Rate Deadline: September 24, 2018

It's a full-service vacation destination in the heart of Wisconsin offering:

- America's largest indoor waterpark
- 27-hole golf club
- World-class spa
- Diverse dining
- Retail shopping
- Movie theaters
- And more

Whether you're 3 or 103, the Kalahari has something for you. So bring the family for a vacation to remember!



All rooms include:

- Four waterpark passes
- Complimentary fitness center access
- High-speed internet
- Patio or balcony
- Microwave
- Refrigerator
- Ironing board and iron
- In-room safe
- Flat-screen TV with cable

## Room Rates

Special room rates available at the Kalahari October 22-29 if you reserve by September 24. Wish to extend your stay? Check with the Kalahari on discounted rates before and after WSSFC.

Room rates are for up to four people per room. There is an additional per-person charge for more than four people.

## Register

To reserve rooms at the discounted conference rate, call (877) 253-5466 by September 24, 2018 and mention you're with the 2018 Wisconsin Solo & Small Firm Conference.

	Wed. 10/24	Thur. 10/25	Fri. 10/26	Sat. 10/27
Standard room	\$119	\$129	\$159	\$159
Two-room family suite	\$209	\$209	\$229	\$229
Lodge suite	\$149	\$159	\$199	\$199
Combination suite	\$269	\$289	\$359	\$359
Village suite	\$399	\$429	\$569	\$569







## Sponsors and Exhibitors



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Wispact  
Affinity Consulting Group  
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# Attendee Information

## Conference Access

All attendees must register for WSSFC and have a conference name badge. Your name badge allows you access to CLE sessions, meals, receptions, and the Legal Expo.

## Conference Materials

Registrants can download course materials before the conference from *myStateBar*. Course materials will be distributed via flash drive to all attendees at the event. PDFs of the materials will also be available through the WSSFC Guide on the Guidebook app - it's perfect for Apple users unable to use zip files or those not able to plug a flash drive into their devices.

## Cancellations

Registration cancellations received by 4:30 p.m. CT on October 8, 2018, will receive a full refund of the registration fee. We're sorry, but 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. 6142 at least three weeks prior to WSSFC so we can make appropriate arrangements.

## CLE Credit

WSSFC 2018 will be submitted to the Wisconsin Board of Bar Examiners for up to 12.0 CLE; 6.0 EPR; 6.0 LPM; and 4.0 LAU credits. It will also be submitted to the Minnesota Board of Continuing Legal Education. You can earn additional credits by watching complimentary webcast replays of selected CLE sessions in November and December.

## Free Webcasts After the Conference

Worried about missing a CLE session? Relax. We'll be recording and webcasting select breakout sessions at WSSFC—and attendees receive FREE access to the first two sets of webcasts! Filmed sessions will be announced in October and replay information will be communicated via email.

## To Register

- Online: <http://marketplace.wisbar.org> (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)

## WSSFC 2018 Planning Committee

### Executive Committee

Sarah L. Ruffi - Conference Chair  
J. David Krekeler - Past Chair  
Nerino J. Petro, Jr. - Chair-Elect  
Christopher Shattuck - LOMAP Advisor  
Timothy Clark - PINNACLE Seminars Division Manager  
Barbara Moddes - PINNACLE Program Planner

### Plenary Committee

Paul F. Angel  
Kathleen A. Brost  
Jeffrey S. Krause  
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Nancy L. Trueblood

### Substantive Law Track

Sara M. Drescher\*  
Kate Knowlton\*  
Carol E. Krigbaum  
Eliza M. Reyes  
Melissa A. Spindler  
Alexander L. Ullenberg

### Practice Management Track

Jeffrey S. Krause\*  
Sarah L. Ruffi\*  
Stephanie L. Melnik  
Erin R. Ogden  
Todd W. Schluesche  
Michael Seung-Hyock Yang

### Technology Track

Brent J. Hoeft\*  
Nerino J. Petro, Jr.\*  
Quality of Life/Ethics Track  
Paul F. Angel\*  
J. David Krekeler\*  
Deborah M. Richter  
Aiden Tharp

\*Indicates Track Chair

# WISCONSIN SOLO & SMALL FIRM CONFERENCE

Oct. 25-27, 2018  
KALAHARI RESORT,  
WISCONSIN DELLS

## REGISTRATION FORM Please print or type.

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

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

### EARLY REGISTRATION DISCOUNT

### REGISTER BY OCT. 3RD

#### CONFERENCE TUITION

EARLY    STANDARD

For early registration discount, you must register by **October 3, 2018**.

State Bar of Wisconsin members (with luncheon).....	\$299	..... \$349	\$ _____
New State Bar of Wisconsin members (with luncheon) .....	\$149.50	..... \$174.50	\$ _____
<small>(Admitted to practice after April 30, 2013)</small>			
<u>Staff</u> of State Bar members (with luncheon).....	\$299	..... \$349	\$ _____
WALA members (with luncheon).....	\$299	..... \$349	\$ _____
Ultimate Pass Gold Subscriber (with luncheon).....		\$20	\$ _____
		(without luncheon) .....	\$0 \$ _____
Ultimate Pass Silver Subscriber (with luncheon) .....	\$149.50	..... \$179.50	\$ _____
Nonmembers (with luncheon) .....	\$399	..... \$499	\$ _____
Law Students (with luncheon).....		\$20	\$ _____
Law Students (without luncheon).....		\$0	\$ _____
<b>TOTAL ENCLOSED</b>			\$ _____

- Check Enclosed (payable to State Bar PINNACLE)  
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**PRIORITY CODE: IN910-2018**

#### Notice to All Registrants, Instructors, Exhibitors, and Guests

By attending this event, you understand and agree that you may be photographed and/or electronically recorded during the event. Furthermore, you hereby grant 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.



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**First-time attendees save  
an additional \$50**

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**Make reservations by Sept. 24  
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**Find more information at [wssfc.org](http://wssfc.org)**