

YOU DON'T HAVE TO FLY SOLO!



CONFERENCE GUIDE



**2018 WISCONSIN SOLO &
SMALL FIRM CONFERENCE**

October 25-27, 2018

Kalahari Resort, Wisconsin Dells

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2018 WSSFC Planning Committee

A word of thanks to the Planning Committee for their generous contributions of time, talent and energy to make this event a success. We appreciate their work and service to the members of the State Bar.

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
 J. David Krekeler
 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. McInick
 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

Exhibit Hall Hours:

Thursday
 11:55 a.m. – 6:30 p.m.

Friday
 7:45 a.m. – 1:40 p.m.

This year's Legal Expo features more than 30 businesses whose products and services are designed to help you better manage your practice.

Knowledgeable representatives are on hand to provide you with information on technology, insurance programs, expert services, practice management tools, marketing, research, financial services, and more.

Exhibitors contribute important financial support to State Bar of Wisconsin PINNACLE Conferences & Institutes. Please return that support by visiting their booths.

Win Prizes

You have several chances to win prizes:

- Participate in the Scavenger Hunt during the Attendee Reception on Thursday.
- Stop by the individual booths to register for the many door prizes being offered directly from exhibitors.
- Have your PASSPORT TO PRIZES signed by exhibitors and drop it at the State Bar booth.
- Drop your business card at the hospitality suite on Friday.

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*.

Refreshment Breaks

Expo Hall

Visit the Exhibit Hall during session breaks for refreshments, networking, and a chance to win prizes.

Dine-Arounds

Sign-up at the Conference Registration Desk

Looking to make dinner plans Thursday night? Expand your connections with dedicated dining options at Wisconsin Dells restaurants that meet your budget. Facilitated by WSSFC speakers, planning committee members, and the State Bar's Real Property Probate and Trust Law Section. Take a chance — maybe you'll meet that one key connection at the Dine Around!

How it works:

1. Claim your seat at the table by signing up at the registration desk.
2. 6:20 – Meet your group at the registration table.
3. 6:30 – Groups leave for restaurants.
4. 7 – Dinner.

This is a pay-on-your-own event. Spouses and companions are welcome, but please no children.

HOSPITALITY SUITE

Friday 5:00 - 6:30 p.m. | Room 4000, Sands Building

Enjoy wine, beer, and refreshments sponsored by:

**KREKELER
STROTHER, S.C.**

SK SmithKeane LLP
INTELLECTUAL PROPERTY LAW

SIGN IN FOR CLE CREDITS!

Please be sure to sign-in at the registration counter **each day** to ensure your credits are accurately reported to the BBE.

General Information

REGISTRATION

IMPORTANT: Sign in each day before attending any sessions.

Thursday, October 25	8:00 a.m. - 5:00 p.m.
Friday, October 26	7:45 a.m. - 4:00 p.m.
Saturday, October 27	7:00 a.m. - 10:50 a.m.

The State Bar registration booth is located either directly outside the Exhibit Hall, or just inside the Expo doors.

CREDITS

The *Conference* programs have been submitted to the Wisconsin Board of Bar Examiners for up to **17.5 Credits**, including up to **12.0 CLE, 6.0 EPR, 4.0 LAU**, and up to **6.0 LPM**.

EPR Credit Sessions:

An Ethics Fee For All	1.5 EPR
Expanding Your Practice Ethically: Tips and Traps	1.0 EPR
Interactive Ethics: What Would YOU Do?	1.0 EPR
Oh What Tangled Webs We Weave... Ethical Dilemmas in Estate Planning	1.0 EPR
The Top Six things Solos and Small Firms Can Do to Avoid Disciplinary and Malpractice Claims	1.5 EPR

LPM Credit Sessions:

50 Tips in 50 Minutes	1.0 LPM
Can I Survive for a Day... Using ONLY My iPad?	1.0 LPM
Cyber Insurance 101: What You Need to Know to Protect Your Practice	1.0 LPM
Document Automation Made Easy: Tips, Tricks, and Tools for Everyone	1.0 LPM
Five Steps to a Successful Law Firm Succession Plan	1.0 LPM
Gadgets, Gizmos, and Widgets	1.0 LPM
Own Your Practice – Without It Owning You	1.0 LPM
PDF Essentials: What Lawyers Need to Know and Why	1.0 LPM
Suddenly I have a Team... Now What?	1.0 LPM
Taking the Leap: Practical Matters in Running a Solo Practice	1.0 LPM
The Mobile Lawyer Toolkit	1.0 LPM
Urban Pioneers: Bridging the Gap from Law School to Rural Practice	1.0 LPM
We've Been Hit! Common Threats, Best Practices and What to do When Ransomware Strikes	1.0 LPM
What You Didn't Know MS Word Can Do	1.0 LPM
What You Need to Learn NOW to be Ready for 2023	1.5 LPM
Women in the Law: A Candid Discussion	1.5 LPM

LAU Credit Sessions:

A Roadmap to Behavioral Change	1.0 LAU
Setting Proper Client Boundaries: Helpful tips, Apps, and Wellness Advice	1.0 LAU
Taming the Digital Chaos! Time, Task, Email & Distraction Management	1.5 LAU
Your Pre-Flight Checklist for an Organized Practice	1.0 LAU

LODGING INFORMATION

Kalahari Resort and Convention Center
1305 Kalahari Drive, Wisconsin Dells, WI 53965
(877) 254-5466

NAME BADGES

Please wear your badge at all official *Conference* functions. It is your admission to all CLE programs, workshops, and events. In addition, your badge will help you to renew old friendships and meet new colleagues. Name badge ribbons will help you identify State Bar speakers, conference sponsors, and exhibitors.

PLEASE RECYCLE YOUR NAME BADGE HOLDER

Before you leave the *Conference*, please drop your name badge holder in one of the name badge boxes. We appreciate your efforts to help our environment.



HOSPITALITY STATIONS

Hospitality stations are located in the Expo Hall. A complimentary breakfast will be served each day, with refreshments served during session breaks.

LIST OF PREREGISTRANTS

Wondering if someone is here? A list of all preregistered attendees is available at the registration booth.

Thank you to this year's exhibitors

Exhibitor	Booth
ABA Retirement Funds Program	35
AbacusNext/HotDocs Market	7
Affinity Consulting Group	27
ALPS Lawyers Malpractice Insurance	32
Atticus, Inc.	12
Beacon & Bridge Institute, Inc. d/b/a Attorneys Contingency System	31
Boyle Fredrickson, S.C.	2
Bultman Financial Services	34
Digital Intelligence	15
eCourt Reporters	22
FindLaw	33
GilsbarPRO	11
Gingras, Cates & Wachs Law Firm	9
Habush, Habush & Rottier, S.C.	20
Johnson Financial Group	25
KC Computers/Computers Nationwide.....	19
LAWCLERK	18
LawPay	24
M3 Insurance	26
Minnesota Lawyers Mutual Insurance Company	21
Parasec	29
Professional Insurance Programs	5
RyTech, LLC	23
Smith.ai Virtual Receptionists	6
Tab3 Software/River Run	16
Tobin Solutions	3
TrustPoint	14
Unisearch, Inc.....	17
University of Wisconsin Law School	28
West Bend Mutual Insurance Company	4
Wisconsin Army National Guard	10
Wisconsin Association of Legal Administrators.....	1
Wisconsin Court System	20
Wisconsin Lawyers Mutual Insurance Company	8
Wispect	13

Be sure to note room assignments each day for the CLE tracks.

Thursday Schedule	Substantive Track <i>Ballroom 5</i>	Practice Management Track <i>Aralia / Marula</i>	Technology Track <i>Ballroom 4</i> <i>Sponsored by Digital Intelligence and Bakke Norman, S.C.</i>	Quality of Life/Ethics Track <i>Aloeswood/Tamboti</i>	Credits*
8 a.m. - 5 p.m.	Conference Registration - North Atrium				
8 - 8:30 a.m.	Continental Breakfast. Compliments of Hupy and Abraham, S.C. - North Atrium				
8:30 - 10:25 a.m.	Opening Plenary: Negotiation Origami: Five Key Skills to Improve Your Negotiation Effectiveness (2.0 CLE) - <i>Andrea Kupfer Schneider</i> - Ballrooms 1, 8				2.0
10:25 - 10:40 a.m.	Refreshment Break - North Atrium				
10:40 - 11:55 a.m.	Plenary: Women in the Law: A Candid Discussion (1.5 LPM; 1.0 Elimination of Bias Credit in Minnesota) - <i>Gail C. Groy, Ann S. Jacobs, Hon. JoAnne F. Kloppenburg, Stephanie L. Melnick, Rachel Monaco-Wilcox</i> - Ballrooms 1, 8				1.5
11:55 a.m. - 12:55 p.m.	Legal Expo Grand Opening & Lunch. Lunch compliments of Habush, Habush & Rottier, S.C. and FindLaw				
1 - 2:30 p.m.	Plenary: What You Need to Learn NOW to Be Ready For 2023 (1.5 LPM) - <i>Nerino J. Petro, Jr. (Moderator), Hon. Daniel Kelly, Aviva Meridian Kaiser, Jeffrey S. Krause, J. David Krekeler, Mark C. Metzger, Odalo J. Ohiku, Thomas J. Watson, Shannon Yocum</i> - Ballrooms 1, 8				1.5
2:30 - 2:55 p.m.	Refreshment Break – visit the Legal Expo and get your passport signed to be entered to win great prizes!				
Session 1 2:55 - 3:45 p.m.	Management of Client Intake in Elder Law (1.0 CLE) - <i>Kate Knowlton, Pat Jenkins</i>	Suddenly I Have a Team! Now What? (1.0 LPM) - <i>Kory Dogs, Mitch Mastardi</i>	We've Been Hit! Common Threats, Best Practices, and What to do When Ransomware Strikes (1.0 LPM) - <i>Brent J. Hoeft</i>	Setting Proper Client Boundaries: Helpful Tips, Apps, and Wellness Advice (1.0 LAU) - <i>Christopher C. Shattuck, Mary Spranger</i>	1.0
3:45 - 4:10 p.m.	Refreshment Break - Visit the Legal Expo and get your passport signed for a chance to win great prizes!				
Session 2 4:10 - 5 p.m.	Brain Compatible Content: How to Create Messages That Parallel the Brain's Processing of Information (1.0 CLE) - <i>Phil Ransom, W. Lou Tetlan</i>	Urban Pioneers: Bridging the Gap from Law School to Rural Practice (1.0 LPM) - <i>Jeffrey M. Glazer, Penny J. Precour, Todd W. Schluesche</i>	Cyber Insurance 101: What You Need to Know to Protect Your Practice (1.0 LPM) - <i>Tom Widman</i>	Expanding Your Practice Ethically: Tips and Traps (1.0 EPR) - <i>Dean R. Dietrich, Timothy J. Pierce</i>	1.0
5- 6:30 p.m.	Attendee Reception in the Legal Expo - Enjoy complimentary hors'doevres, beer, wine, and soda. Cash Bar also available. <i>Sponsored by WILMIC and West Bend Mutual Insurance Co.</i> - Expo Hall				
6:30 p.m.	Dine-Arounds (Sign-up required - See page 2 for details)				

Friday Schedule	Substantive Track <i>Aloeswood/Tamboti</i>	Practice Management Track <i>Ballroom 5</i>	Technology Track <i>Aralia / Marula</i> <i>Sponsored by Digital Intelligence and Bakke Norman, S.C.</i>	Quality of Life/Ethics Track <i>Ballroom 4</i>	Credits
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. - Expo Hall				
7:45 - 4:00 a.m.	Conference Registration				
7:45 - 8:45 a.m.	Deluxe Continental Breakfast compliments of Hupy and Abraham, S.C. - Expo Hall				
8:45 - 10:15 a.m.	Plenary: Taming the Digital Chaos! Time, Task, Email & Distraction Management (1.5 LAU) - <i>Paul J. Unger</i> - Ballrooms 1, 8				1.5
10:15 - 10:45 a.m.	Refreshment Break - Last chance to visit the Legal Expo and get your passport signed to be entered to win great prizes! - Expo Hall				
Session 3 10:45 a.m. - 12 p.m.	The Dreaded "B" Word – Bankruptcy Basics for the General Practitioner, Trivia Style (1.5 CLE) - <i>Eliza M. Reyes, Jennifer M. Schank</i>	Own Your Practice – Without it Owning You (1.5 LPM) - <i>Mark C. Metzger</i>	Extreme Makeover: Law Firm Website Edition (No Credit) - <i>Catherine Sanders Reach</i>	An Ethics Fee for All (1.5 EPR) - <i>Brian C. Anderson, Aviva Meridian Kaiser, J. David Krekeler</i>	1.5
Noon - 1:30 p.m.	Networking Luncheon & 2018 Lederer Award Presentation - <i>Sponsored by M3 Insurance and the Real Property, Probate & Trust Law Section</i> - Ballrooms 1, 8				
1:30 - 1:45 p.m.	Feeling lucky? Passport to prizes and exhibitor drawing winners will be announced in the Expo Hall - Expo Hall				

Session 4 1:45 - 2:35 p.m.	Intellectual Property Law for Business Owners (1.0 CLE) - <i>Garet K. Galster, Melissa A. Spindler</i>	Building your Solo and Small-Firm Attorney Dream Team (No Credit) - <i>Timothy J. Cody, Erin R. Ogden, Spencer X. Smith</i>	The Mobile Lawyer Toolkit (1.0 LPM) - <i>Brent J. Hoeft, Christopher C. Shattuck</i>	Oh What Tangled Webs We Weave... Ethical Dilemmas in Estate Planning (1.0 EPR) - <i>Elizabeth Ruthmansdorfer</i>	1.0
Session 5 2:50 - 3:40 p.m.	Disclosures, Deeds, and Other Dirt (1.0 CLE) - <i>Carol E. Krigbaum, Liz Tobolt</i>	Establishing a Compensation Structure for Associates and Staff (1.0 CLE) - <i>J. David Krekeler, Sarah L. Ruffi</i>	PDF Essentials: What Lawyers Need to Know and Why (1.0 LPM) - <i>Nerino J. Petro, Jr., Bryan Sims</i>	A Roadmap to Behavioral Change (1.0 LAU) - <i>Hope Wood</i>	1.0
Session 6 4:05 - 4:55 p.m.	Navigating HR Myths and Landmines - What Every Nonemployment Lawyer Should Know (1.0 CLE) - <i>Jill Hamill Sopha</i>	50 Tips in 50 Minutes (1.0 LPM) - <i>Brent J. Hoeft, Jeffrey S. Krause, Nerino J. Petro, Jr., Catherine Sanders Reach, Christopher C. Shattuck, Bryan Sims, Spencer X. Smith</i>	Can I Survive For a Day... Using ONLY My iPad? (1.0 LPM) - <i>Mark C. Metzger</i>	Your Pre-Flight Checklist for an Organized Practice (1.0 LAU) - <i>Erin R. Ogden, Ryan R. Seib</i>	1.0
5 - 6:30 p.m.	Hospitality Suite - Enjoy wine and refreshments sponsored by Krekeler Strother S.C. and Smith Keane LLP - Room 4000, Sands Building (Dinner on your own.)				

Saturday Schedule	Substantive Track <i>Ballroom 7</i>	Practice Management Track <i>Aloeswood</i>	Technology Track <i>Tamboti</i> Sponsored by Digital Intelligence and Bakke Norman, S.C.	Quality of Life/Ethics Track <i>Ballroom 2</i>	Credits
7 - 10:50 a.m.	Conference Registration - North Hallway				
7 - 8 a.m.	Continental Breakfast - compliments of Hupy and Abraham, S.C. - North Hallway				
7:30 - 8:20 a.m.	Plenary: Gadgets, Gizmos, and Widgets (1.0 LPM) - <i>Nerino J. Petro, Jr., Bryan Sims</i> - Ballrooms 1, 8				1.0
Session 7 8:30 - 9:20 a.m.	10 Ways to Contest a Will, Trust, or Pre-Death Transfer and Prevent a Contest (1.0 CLE) - <i>Alexander L. Ullenberg</i>	Culture Chicken, Brand Egg - Which Comes First? (No credit) - <i>D.P. Knudten</i>	What You Didn't Know MS Word Can Do (1.0 LPM) - <i>Catherine Sanders Reach, Bryan Sims</i>	Taking the Leap: Practical Matters in Running a Solo Practice (1.0 LPM) - <i>William Bratcher, Kimberly A. Henderson, Aiden Tharp, Sarah Slice Yacoub</i>	1.0
9:20 - 9:50 a.m.	Break/Hotel check-out				
Session 8 9:50 - 10:40 a.m.	Achieving Success in Sexual Harassment Cases: A Plaintiff Lawyer's Perspective (1.0 CLE) - <i>Amy F. Scarr</i>	Five Steps to a Successful Law Firm Succession Plan (1.0 LPM) - <i>Jeffrey S. Krause</i>	Document Automation Made Easy: Tips, Tricks, and Tools for Everyone (1.0 LPM) - <i>Michael F. Brennan, Nerino J. Petro, Jr.</i>	Interactive Ethics: What Would YOU Do? (1.0 EPR) - <i>Kate R. Kruse</i>	1.0
10:50 a.m. - 12:15 p.m.	Closing Plenary: The Top Six Things Solos and Small Firms Can Do to Avoid Disciplinary and Malpractice Claims - <i>Allison L. Wood</i> - Ballrooms 1, 8				1.5

CONTINENTAL BREAKFAST

Thursday 8 - 8:30 a.m. | North Atrium
Friday 7:45 - 8:45 a.m. | Expo Hall
Saturday 7 - 8 a.m. | North Hallway

Sponsored by **Hupy and Abraham** S.C.
personal injury lawyers

ATTENDEE RECEPTION

Thursday 5 - 6:30 p.m. — Expo Hall
Enjoy beer, wine and soda, plus a cash bar and hors d'ouvres sponsored by:

Wisconsin Lawyers Mutual
INSURANCE COMPANY



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 – 6:30 p.m.

Sponsored by West Bend Mutual Insurance and WILMIC

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. Participate in the scavenger hunt for a chance to win a prize.

Dine-Arounds

Starting at 6:30 p.m. – Meet at 6:20 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

Check conference registration desk for availability.

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 – 1:30 p.m.

Sponsored by M3 Insurance and the 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.

Hospitality Suite

5 – 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.



Follow the *WSSFC* on Twitter. If tweeting about or from the conference the hashtag is **#wssfc**

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 Brynson 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

Suddenly I Have a Team! Now What?

If you're knee-deep in admin work, you can't practice law. So you hire an admin, a bookkeeper, and then a paralegal. But how do you make these people into a team? Welcome to potentially the most rewarding (and frustrating) thing about being a business owner - your team! When they do well, you can grow exponentially. When they don't, you're stuck playing the micromanager.

Discover the 5 secrets to building a winning team:

- Leadership
- Common goals

Program Descriptions (continued)

- Rules of the game
- Action plan
- 100% involvement & inclusion

*Kory Dogs, ActionCOACH Business & Executive Coaching
Mitch Mostardi, Lift Consulting, A Sandler Sales Company*

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, FirmLock Consulting, LLC and 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.

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

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, Dietrich Vander Waal, S.C., Wausau
Timothy J. Pierce, State Bar of Wisconsin, Madison*



EARN EVEN MORE CREDITS!

Select sessions of the conference will be recorded and webcast on November 29 & 30 and December 11 & 12 ... and all conference attendees will be allowed to view these dates FOR FREE!

FRIDAY, OCTOBER 26

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 Owing 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 with 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

WIN FABULOUS PRIZES

Participate in the **Passport to Prizes** give-away and Thursday's **Scavenger Hunt** (during the Attendee Reception) for a chance to win valuable prizes. Forms are available at the Registration Desk and can be deposited at State Bar booth when completed. Prizes include Target and Apple gift cards, tech items for home or office, PINNACLE CLE gift certificates, and registration for the 2019 Annual Meeting & Conference in Green Bay. Scavenger Hunt winners will be announced in the Legal Expo at 6:20 Thursday. Winner must be present to win. Passport to Prizes winners will be announced in the Legal Expo after the Networking Luncheon on Friday, but you need not be present to win.

Program Descriptions (continued)

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

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, FirmLock Consulting LLC and 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

Carol E. Krigbaum, Krigbaum Law LLC, Milwaukee

Liz Tobolt, Liz Tobolt Law LLC, Hartland

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, FirmLock Consulting LLC and 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 27

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

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



Follow the *WSSFC* on Twitter. If tweeting about or from the conference the hashtag is **#wssfc**

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

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www.keaneip.com



HOSPITALITY SUITE Sponsor

Smith Keane LLP is a full service intellectual property law firm providing clients with strategic IP counseling and services at a predictable cost. Smith Keane assists clients throughout the lifecycle of their IP – from procurement to competitive analytics to enforcement. Smith Keane handles all types of IP including: patents, trademarks, copyrights, and proprietary information.

State Bar of Wisconsin Real Property, Probate & Trust Law Section
www.wisbar.org/rppt



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Providing a forum for the discussion of questions pertaining to the law of real property, trusts and probate. Section members serve on committees to develop legislation, practice forms and procedures, and CLE in numerous related areas of law, including estate planning.

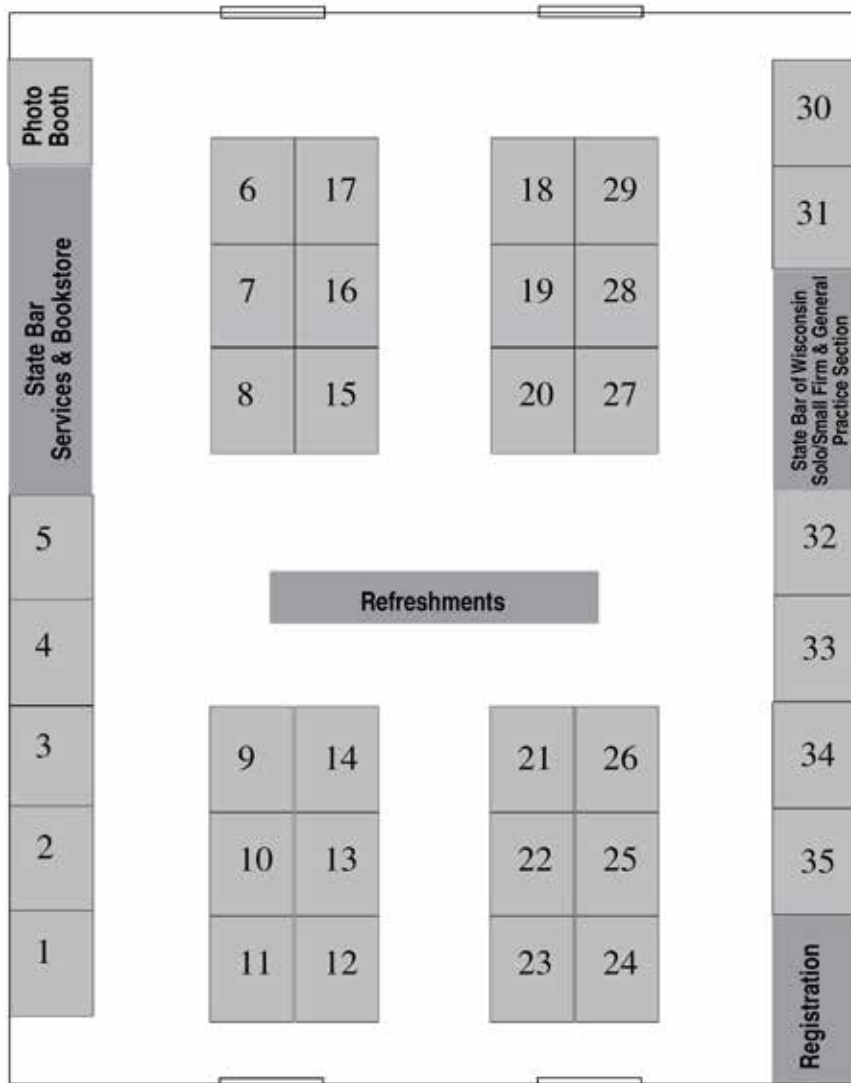
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At Bakke Norman our sole purpose is to serve our clients. We are problem solvers and take a team approach to helping our individual and business clients. The law firm of Bakke Norman S.C., with offices in New Richmond, Menomonie, Baldwin, and Hudson, has served northwest Wisconsin since 1985.

EXHIBIT HALL MAP



Exhibitor Directory

#7 AbacusNext/HotDocs Market
www.abacusnext.com

As the largest Technology-as-a-Service (TaaS) provider for the professional services sector, AbacusNext helps legal and accounting professionals achieve ultimate success and peace of mind through the delivery of a complete suite of compliance-ready technology solutions designed to support a secure and cloud-enabled practice at a cost they can afford.

#27 Affinity Consulting Group
www.affinityconsulting.com
www.affinityuniversity.com

At Affinity Consulting Group, we inspire, enable, and empower legal teams of all sizes to work smarter. Our holistic approach incorporates people, process, and technology. Our passionate, well-connected industry experts work hand in hand with you to help you better understand and optimize your business – from software to growth strategy, and everything in between.

#32 ALPS Lawyers Malpractice Insurance

GOLD Sponsor

www.alpsnet.com

Lawyers put themselves on the line every day. ALPS is here to protect them. Founded by lawyers in 1988, ALPS is now the nation's largest direct writer of lawyers' malpractice insurance and is endorsed by more state bars than any other carrier. With ALPS, it's not just a policy. It's a promise.

#35 ABA Retirement Funds Program
www.abaretirement.com

Not all retirement plans are alike. Find out why thousands of law firms of all sizes use the ABA Retirement Funds Program as their 401(k) provider. Call us at 866-812-3580 for a free consultation or visit www.abaretirement.com to learn about a different kind of retirement plan built specifically for the legal community.

#12 Atticus, Inc.

www.atticusadvantage.com

Atticus helps solo and small law firm attorneys be more productive (i.e. profitable) while enjoying life away from the office with friends and family. Since 1989, our individual and group coaching seminars and webinars have helped growth-minded attorneys increase revenue, lower their stress, and develop a great support team.

#31 Attorney Contingency System

www.beaconbridge.com

Attorney Contingency System preserves the law practice during temporary absence of owner attorney (or key employee). It is the logical, *effective* solution to a devastating possibility faced by every solo and small office estate planning practitioner and was developed by a national team of attorneys, professional consultants, and business advisors.

#7 Boyle Fredrickson

www.boylefred.com

Boyle Fredrickson is Wisconsin's largest intellectual property law firm. The firm handles all facets of IP law, from patents, trademarks and copyrights to trade secrets, unfair competition and licensing. The firm's singular focus on domestic and international IP law allows Boyle Fredrickson to provide expert counsel, personal service and attention to detail not found anywhere else.

#34 Bultman Financial Services

www.bultmanfinancial.com

Bultman Financial Services Inc. (BFS) provides financial and insurance strategies and recommendations that are in the best interest of our clients. With over 30+ years of experience BFS demonstrates a strong commitment to our clients and their purpose. Since 1995 BFS has served as the administrator for the State Bar of Wisconsin's life, disability, long-term care, health, dental and vision insurance plans. More than 3,000 members and their spouses have been covered by these plans.

#15 Digital Intelligence

GOLD Sponsor

TECH TRACK Sponsor

www.digitalintelligence.com

Digital Intelligence offers a complete line of eDiscovery and digital forensic services and solutions from analysis/casework, expert testimony, eDiscovery review and processing, forensic hardware, software, and training. We also consult on how to implement and provide all of these services.

#22 eCourt Reporters

www.ecourtreporters.com

Direct scheduling made easy. Online platform is designed to directly schedule experienced freelance court reporters/videographers in any state across the country. Free service for attorneys. Instant access to available reporters and videographers in locations you need. See certifications and upfront pricing before you book!

#33 FindLaw

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www.lawyermarketing.com

Having a professional website is still important, but it is one piece of an increasingly complex puzzle. Today, online consumers are connecting to the internet in more ways than ever before. More than half log in through tablets or smartphones, and a growing number are bypassing traditional search engines altogether. This massive shift in consumer behavior calls for a multi-pronged strategy that puts you in more places online so you can engage more targeted prospects. But how do attorneys find the time to develop such a strategy? And where do you start? That's where FindLaw's expertise can help.

#11 GilsbarPRO

www.gilsbarpro.com

GilsbarPRO has provided malpractice insurance and business protection policies to professionals since 1959. As one of the nation's largest administrators, GilsbarPRO provides comprehensive policy coverage to more than 30,000 professionals. Join the thousands of clients who trust GilsbarPRO with their insurance needs. Request your free, no-obligation quote online today at www.gilsbarpro.com/LPL-Pronto-Quote.

#9 Gingras, Cates & Wachs Law Firm

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www.gcwlawyers.com

Gingras, Cates & Wachs has represented people all over Wisconsin for over 35 years. Talk to our team about referral arrangements for personal injury, legal malpractice, bad faith, medical malpractice, civil rights/employment, and family law matters. GCW also has extensive experience in class and collective actions, and Multi-District Litigation.

#20 Habush, Habush & Rottier, S.C.

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www.habush.com

Habush Habush & Rottier has served as a Wisconsin premier personal injury law firm since 1930. Our firm has 13 offices located throughout the state with local attorneys working and living in your community. We work with referral counsel and offer flexible arrangements on work sharing, fees and costs.

#25 Johnson Financial Group

www.johnsonbank.com

Johnson Financial Group is a premier, privately owned financial services company offering banking, wealth and insurance solutions. As trusted partners, Johnson Financial Group associates work together to sustain thriving futures for business, individuals and communities. The \$5 billion financial services company operates in Wisconsin, Arizona and Minnesota. Principal owners of Johnson Financial Group are members of the Samuel C. Johnson family. Helen Johnson-Leipold is Chairman of Johnson Financial Group.

#19 KC Computers/Computers Nationwide

www.kccomputersales.com

www.computersnationwide.com

Computers Nationwide is a Network, Telecom, and security company that specializes in providing dependable and innovative Technology solutions to all size businesses. We like to work proactively with businesses to build a strong relationship and to make sure our customer's technology runs as smooth as possible. Our mission is to provide high quality service while ensuring total customer satisfaction at a competitive price.

#18 LAWCLERK

www.lawclerk.legal

LAWCLERK is where attorneys go to hire freelance lawyers. Whether you need a first year for a research project or a seasoned attorney to assist with a complicated appellate brief, LAWCLERK has 1,000+ freelance lawyers with every level of experience. No sign-up or monthly fees – only pay the flat fee price YOU set!

#24 LawPay

www.lawpay.com

LawPay is the proven payment partner for law firms, offering technology developed to meet lawyers' needs. Our simple solution correctly separates earned and unearned fees, protects IOLTA accounts, and provides PCI Level 1 security. Our in-house support team is here to help you succeed with knowledgeable, personalized service.

#26 M3 Insurance

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www.M3ins.com

M3 Insurance offers insight, advice and strategies to help clients manage risk, purchase insurance and provide employee benefits. We are committed to being experts in both the products we represent and the industries we serve. M3 is consistently ranked a top 100 broker in America and celebrates its 50th anniversary in 2018.

#21 Minnesota Lawyers Mutual Insurance Company

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www.mlmins.com

Founded by lawyers in 1982, Minnesota Lawyers Mutual Insurance Company (MLM) provides professional liability insurance and risk management services for the legal community. MLM is an efficient, accountable and permanent practice management resource, exemplified by an AM Best rating of A- (excellent), and a consistent dividend return for the past 30 years.

#29 Parasec

www.parasec.com

Parasec is a national entity formation and compliance company dedicated to delivering exceptional service, and accurate and timely results. We provide expertise in registered agent services, annual report services, intellectual property, UCC, real property, and more.

Exhibitor Directory (continued)

#5 Professional Insurance Programs

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www.insuranceformembers.com

At Professional Insurance Programs, providing quality insurance programs to State Bar Members is just the beginning. We pride ourselves in understanding the unique environment our professional clientele faces every day to better service association members. From Home & Auto Insurance to Professional Liability insurance, we are helping you protect what matters most.

#16 River Run

www.river-run.com

River Run is a full service IT firm, founded in 1993. We provide services that will help secure, backup, and keep your system running efficiently. Our engineers, account executives, and quality control team work with clients throughout the Greater Milwaukee area to find the right solutions for their technology needs.

#23 RyTech, LLC

www.rytechllc.com

RyTech is a strategic digital marketing agency that elevates online marketing with specific emphasis on search engine marketing, social media marketing, website development, and graphic design solutions.

#6 Smith.ai Virtual Receptionists

www.smith.ai

Smith.ai is a superior virtual receptionist service for solo and small-firm attorneys. Our U.S.-based receptionists answer and return calls, qualify leads, intake clients, book appointments, and accept payments, so your practice is more productive and professional. Plans start at \$60/month. Get started with a 10-call free trial at <https://smith.ai>, and use code WISBAR50 for \$50 off your first month.

State Bar of Wisconsin Solo/Small Firm & General Practice Section

Enhancing the quality of practice for the solo and small firm lawyer, as well as the lawyer who has interests beyond the bounds of a single professional practice area. The section sponsors CLE seminars, provides resources on its webpage and produces CLE seminars.

#16 Tabs3 Software

www.Tabs3.com

www.Kurent.com

Tab3 is the most award-winning time and billing, practice management, and financial desktop software in the legal industry. Kurent is an easy-to-use cloud billing program designed for solos and small firms to track time, create invoices, record payments, and get paid.

#3 Tobin Solutions

www.tobinsolutions.com

Since 1996, Tobin Solutions has provided a complete range of Information Technology (IT) services and solutions to business. We get systems working reliably and go the extra mile by helping our clients use computers for greater business success!

#14 Trust Point Inc.

GOLD Sponsor

www.trustpointinc.com

For more than a century, Trust Point has provided a full range of financial and advisory services to individuals, families, businesses, and charitable organizations. We are uniquely positioned to offer the highest level of sophistication and professional expertise with genuine personalized service. Our philosophy is simple. We believe that in doing what is best for our clients, we will be doing what is best for Trust Point.

#17 Unisearch

www.unisearch.com

Unisearch, Inc. is a public records research firm that specializes in the search, retrieval, and filing of public documents in all 50 states and internationally. We offer an extensive range of Corporate and Uniform Commercial Code services to legal professionals across the nation.

#28 University of Wisconsin Law School

www.law.wisc.edu

The University of Wisconsin Law School's Office of Career Services & Professional Development and the Lawyering Skills Program are here together to provide information and answer questions about advancing the mutual needs and interests of SSFC attendees and UW Law students and programs.

#4 West Bend Mutual Insurance Company

RECEPTION Sponsor

www.thesilverlining.com

West Bend is a preferred partner of the State Bar of Wisconsin and offers a 10% discount on home and auto insurance.

#10 Wisconsin Army National Guard

www.nationalguard.com/jag

The Wisconsin Army National Guard (WIARNG) is made up of approximately 7,500 Soldiers including a headquarters staff in Madison and four major commands located throughout 67 Wisconsin communities. The WIARNG has both a federal and state mission serving under the Governor in peacetime and the President in times of war.

#1 Wisconsin Association of Legal Administrators

www.wi-ala.org

The Wisconsin Chapter of the Association of Legal Administrators (WALA) provides support to legal administrative professionals involved in the management of law firms, corporate legal departments and government legal agencies. Legal Administrative Professionals handle all aspects of management including finance, human resources, facilities, marketing, and information technology.

#30 Wisconsin Court System

www.wicourts.gov

The Consolidated Court Automation Program (CCAP) will provide information on mandatory eFiling, including a demonstration of the eFiling system.

#8 Wisconsin Lawyers Mutual Insurance Company

PLATINUM Sponsor

RECEPTION Sponsor

www.wilmic.com

WILMIC is your local source for professional liability insurance and practice management services. We have been protecting Wisconsin lawyers and helping them manage risk since 1986.

#13 WisPact

www.wispact.org

WisPact Inc. is a private nonprofit organization that administers pooled and community Special Needs Trusts for people with disabilities. It was created in 2003 from a collaborative effort among ARC Wisconsin, NAMI Wisconsin, Inc., the State Bar of Wisconsin Elder Law Section, and the Wisconsin Alzheimer's Association. Based in Madison, WisPact now manages Special Needs Trusts for more than 3,000 people throughout Wisconsin.



SAVE THE DATE!

Join us for next year's conference at the Kalahari in Wisconsin Dells on October 24-26, 2019.