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**OCTOBER 24-26, 2019  
KALAHARI RESORT, WISCONSIN DELLS**



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.



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.



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.

# Your Adventure Begins in Wisconsin Dells!



Solo and small-firm attorneys are the mavericks of the legal world. We're inspired by your pioneering spirit and devotion to providing first-class customer service to your clients. But you shouldn't have to fly solo in the pursuit of your dreams. That's why we created the Wisconsin Solo & Small Firm Conference (WSSFC).

Let WSSFC be your crew, helping you create a world-class customer experience while avoiding turbulence as you navigate your firm's everyday challenges. Whether it's keeping up with multiple practice areas or managing the business side of your office, WSSFC was designed with your needs in mind.

## 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 time to connect and socialize
- Get tools and resources that soar
- 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?

- The Water Factory, a water attraction with fun water sprays ideal for little ones, launched the waterpark craze in Wisconsin Dells, when Polynesian Resort Hotel owner Stan Anderson decided to put a roof over it.
- There are more than 16 million gallons of water in the area's many indoor and outdoor waterparks.
- Wisconsin Dells has more hotel rooms than any other city in Wisconsin, numbering more than 8,000. It also has 19 campgrounds with nearly 3,200 campsites.
- Kalahari Resorts & Conventions is the largest indoor waterpark in Wisconsin at 125,000 sq. ft.



## Reserve your room by **September 23** to ensure best rates and availability.

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 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 sq. ft. Find something for everyone:

- Miles of water slides
- FlowRider surfing simulator
- Indoor and outdoor spa
- Tom Foolerys Adventure Park
- Trappers Turn Golf Club
- Spa Kalahari
- Mud Hut swim-up bar
- Double Cut Charcoal Grill
- Wisconsin Brew Pub
- Bowling
- Laser tag
- Mini golf

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

# Special Events

## CONFERENCE KICK-OFF LUNCHEON

Celebrate the grand opening of the Expo Hall at this energizing event. Lunch will be provided for all Conference registrants – no need for separate registration. 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.

*Sponsored by: Habush, Habush & Rottier, S.C.*



## ATTENDEE RECEPTION

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., compliments of WILMIC and West Bend Mutual Insurance Company.

## CHOOSE YOUR OWN ADVENTURE

Offsite, onsite, with colleagues, with your friends and family, or on your own – YOU choose!

This year we developed two options for you to choose from – one is more for causal socializing with friends and colleagues at local restaurants (Dine-arounds). OR, you can take part in our Family Fun Night, which features FREE reserved bowling, discounted Tom Foolerys tickets, light snacks and refreshments for solo small firm attendees and their families. OR, you can go your own way – you choose.

## FAMILY FUN NIGHT

Join us at the Volcano Lounge and Lanes, located at the Kalahari Resort. Bowl a few frames (for free!) on reserved lanes for conference attendees, and/or take advantage of discounted tickets to Tom Foolerys Adventure Park, Kalahari's 100,000 sq. ft. indoor theme park.

The Volcano Lounge overlooks the theme park. You need not purchase a wristband to take advantage of bowling or relax in the lounge.

The following attractions are included with Tom Foolerys passes:

- G-Force One
- XD Dark Ride
- Atomic Rush
- Centrifooled
- Meteorace
- Ferris Wheel
- Kalahari Carousel
- Legend of the Lost Jungle
- Toucan Climb
- Conqueror's of Mt. Foolmore
- Laser Tag
- Lil' Toucan Climb
- Sky Rangers
- RevoFooltion



## DINE-AROUNDS

Let us take care of your Thursday night dinner reservations by signing up for a dine-around. Each dine-around will be hosted by a WSSFC

speaker or planning committee member and will take place at one of many top-notch restaurants in



Wisconsin Dells. Enjoy stimulating conversation over a delicious meal while making new friends.

Signing up is easy. Simply stop by the Solo/ Small Firm & General Practice Section booth in the Legal Expo to choose your preferred dine-around. Stop by early, though. You may also reserve your spot for a dine-around ahead of the conference online, see the special events tab at [www.wssfc.org](http://www.wssfc.org). Space is limited and last year's dine-arounds filled up quickly!

Attendees are responsible for their own dinner bill. Spouses or significant others are welcome, but please plan to leave the kids at the hotel.

**October 24-26 | Kalahari Resort, Wisconsin Dells**

## CONTINENTAL BREAKFASTS

Start your day off right with a hearty breakfast each morning. Plus, we're serving a deluxe continental breakfast on Friday, compliments of Hupy and Abraham, S.C.



## LEDERER AWARD PRESENTATION AND NETWORKING LUNCHEON

Don't miss one of the highlights of WSSFC - the presentation of the 2019 Lederer Award. Named in memory of attorney John Lederer, the award is presented annually to an individual, group, or organization exemplifying John's leadership, spirit, and dedication.

*Luncheon sponsored by Gingras, Thomsen & Wach*

## HOSPITALITY SUITE

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

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



## Legal Expo

Be sure to check out the Legal Expo between sessions. Learn about products and services designed just for solo and small-firm practitioners - and have your Passport to Prizes signed by each exhibitor for the chance to win great prizes!



## Passport to Prizes Winners

*Friday, 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.

## Ultimate Pass Gold Is Your Ticket to WSSFC

Attend WSSFC 2019 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 24, 2019	
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 a.m.	<b>Opening Plenary:</b> Persuading Judges and Juries
10 - 10:15 a.m.	Refreshment Break
10:15 - 11:30 a.m.	CBD in Wisconsin – All Gray?
	Don't Change Your Size, Change Your Approach: The Advantages of Being Small
	E-Discovery for the Effective E-Advocate
	Design Your Practice and Your Life
11:30 a.m. - 12:30 p.m.	Legal Expo Grand Opening - <i>Lunch compliments of Habush, Habush &amp; Rottier, S.C.</i>
12:30 - 2 p.m.	<b>Plenary:</b> "Moneyball" for Lawyers: Using Data to Build a Major League Practice
2 - 2:25 p.m.	Refreshment Break – visit the Legal Expo and get your passport signed to be entered to win great prizes!
2:25 - 3:15 p.m.	Udderly Broke: How to Liquidate and Sell the Family Farm
	Beyond Moneyball: Keeping Score
	Document Management for the Tech-Savvy Firm
	What You Should Know Before You Go: Leaving the Firm
3:15 - 3:40 p.m.	Refreshment Break – visit the Legal Expo and get your passport signed to be entered to win great prizes!
3:40 - 4:30 p.m.	Offer Strong: 5 Tips for Drafting an Offer to Purchase with Teeth
	Project Management for Law Firms
	The Frugal Lawyer's Guide to Information Security
	To Hire or To Fire: Ethical Concerns
4:30 - 6:00 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 Company.</i> Cash bar also available.
6:00 p.m.	Optional Dine Arouds / Family Fun Night

FRIDAY – October 25, 2019	
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 - 8:30 a.m.	Informational Session – New State Bar of Wisconsin Member Benefit: Competitively-priced health insurance for firms with 2+ employees
8:45 - 10:15 a.m.	<b>Plenary:</b> Houdini's Greatest Secret: Unlocking a Path to Personal and Organizational Success
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 Great Debate: Lawyers and Immigration
	Way More than 50 Tips
	Practical Guide to Implementing Encryption and Security on Your Technology
	Technical Capabilities and Ethical Duties: Online Communication and the Rules of Professional Responsibility
12 - 1:45 p.m.	Networking Luncheon and Presentation of the 2019 Lederer Award. <i>Luncheon sponsored by Gingras, Thomsen &amp; Wachs</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.	There's No Place Like (Someone Else's) Home? Restrictions on Listing a Home for Vacation Rental
	How to Speak so People Stay Awake and Do Not Hate You
	iMazing Presentations from Your iPad
	In Case of Emergency, Put Your Mask on First
2:50 - 3:40 p.m.	Thinking About Adding Public Defender Appointments to your Practice? What You Need to Know as Private Bar Counsel
	Motivating Communication: How to Get People to Talk More About What Matters Most
	Getting the Most from Microsoft Outlook
	Becoming a Happy Lawyer <i>Without</i> Finding Work-Life Balance
3:55 - 4:55 p.m.	<b>Plenary:</b> Gadgets, Gizmos and Widgets
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>

**SATURDAY – October 26, 2019**

Time	Event
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> Substantive Law at Sunrise
8:30 - 9:20 a.m.	Advising Small Businesses Regarding Tax Liability
	Promoting Diversity Through Special Business Designations
	The Amazing Value of Video Conferencing
	Protecting Client Information: How to Win When Fighting Technology
9:20 - 9:50 a.m.	Break/Hotel Check-out
9:50 - 10:40 a.m.	Blockchain and Smart Contracts
	Check Your Attitude, Win Your Case
	Ask the Tech Guys: Law Firm Technology Workshop
	Ins and Outs of (In)Active Practice in the Legal Field
10:50 a.m. - 12:15 p.m.	<b>Plenary:</b> The Fine Art of Getting Paid... Ethically

# CLE Programs & Events

## THURSDAY, OCTOBER 24

8:30 – 10 a.m.

### Opening Plenary

#### Persuading Judges and Juries

Discover the fundamentals of persuasion in the courtroom and learn techniques to improve your performance in criminal and civil trials, as well as at the trial and appellate court levels. This session offers numerous strategies and tactics for persuading judges and juries to find in favor of your client. You'll learn tips for:

- Presenting information to judges and juries
- Developing effective themes and arguments
- Writing persuasive briefs

*Hon. Michael R. Fitzpatrick, Court of Appeals District IV, Madison*

10:15 – 11:30 a.m.

### Substantive Track

#### CBD in Wisconsin – All Gray?

The 2018 Farm Bill and Wisconsin Act 100 opened the door to the growing, processing, and selling of industrial hemp. This session will offer growers guidance on the USDA and FDA regulations around industrial hemp, as well as how to:

- Get a permit
- Ensure THC content is within the legal limit
- Obtain financing from wary lenders

*Jeffrey A. Cornell, Bakke Norman, S.C., Hayward*

### Practice Management Track

#### Don't Change Your Size, Change Your Approach: The Advantages of Being Small

At their best, small firms can be nimble and focused, operating like a fighter jet flying with deadly precision. But achieving that type of high-performance doesn't happen without some work. As the pilot of your firm's destiny, this session will help you chart a course toward success. You will:

- Develop a vision for your practice
- Learn practical steps for implementing your plan

- Get advice for dealing with challenges and setbacks

*Anthony K. Murdock, Murdock Law, S.C., Milwaukee;  
Erin R. Ogden, Ogden, Glazer + Schaefer LLC, Madison;  
AJ Sue, AJ Sue LLC, Middleton*

### Technology Track

#### E-Discovery for the Effective E-Advocate

No litigation matter today can escape the “e” of discovery. Regardless of the size of your firm or the focus of your practice, every lawyer needs to know how to handle electronically-stored information (ESI). This session will cover the basics of collecting, processing, reviewing, and producing ESI, and then provide you with practical and applicable tips that you can integrate into your practice. You'll learn:

- Why virtually all relevant case information is electronic
- The importance of using a document review tool
- Why you should care about data processing
- How to talk to your clients about collecting and preserving relevant ESI
- How to talk to opposing counsel about producing ESI

*Brett Burney, Burney Consultants LLC, Chagrin Falls, OH*

### Quality of Life/Ethics Track

#### Design Your Practice and Your Life

Many attorneys start their own firms so they can enjoy practicing law and spending time with their families. This interactive presentation will encourage participants to dig deep and articulate what they truly want in their career, finances, and family life. After setting your future goals, you'll learn:

- How defining a clear, specific vision boosts your confidence
- How small changes in language use can affect outcomes
- How creating a mental picture can turn your dreams into reality

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

**12:30 - 2 p.m.****Plenary****“Moneyball” for Lawyers: Using Data to Build a Major League Practice**

By utilizing numbers and data for analytic and predictive purposes, the Moneyball concept revolutionized the game of baseball. Similarly, statistical analysis models present a promising solution for responding to the challenge of marketing and delivering legal services to a new generation of clients. This fun, fastball presentation will help you see billing in a whole new light. You'll learn how to:

- Review your firm's business numbers in detail
- Use the “Profit Principle” to create a realistic “box score” for your practice
- Increase your firm's profitability

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

**2:25 - 3:15 p.m.****Substantive Track****Udderly Broke: How to Liquidate and Sell the Family Farm**

In 2018, nearly 3,000 dairy farms went under—700 of those were Wisconsin farms. For the past three years, Wisconsin has led the nation in farm bankruptcies, losing almost two farms a day. This session will primarily cover the winding down and selling of a family farming operation, covering topics such as:

- Whether to liquidate through bankruptcy or receivership
- The tax implications of sales
- Issues to take into account when drafting sale documents
- Exemptions

*John W. Menn, Steinhilber Swanson LLP, Oshkosh;  
Troy R. Schneider, Twohig Rietbrock Schneider & Halbach, S.C., Chilton*

**Practice Management Track****Beyond Moneyball: Keeping Score**

In sports, the scoreboard always tells you who is winning. In business, the reports are your scorecard. This session will build on Thursday afternoon's plenary and dive deeper into the details of running reports. You'll learn:

- Which reports truly matter
- How to create useful reports
- Where to look to find the data you need

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

**Technology Track****Document Management for the Tech-Savvy Firm**

Law firms deal with many different types of data. Effective and creative use of document management systems can reduce paper, improve efficiency, support process automation and risk management. This session will share software and strategies for effectively managing documents, systems, and email. Discover what to consider when choosing:

- Document management software
- Practice management software
- Your own self-created document management system

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

**Quality of Life/Ethics Track****What You Should Know Before You Go: Leaving the Firm**

Making a career change inevitably triggers a slew of matters that need to be quickly wrapped up, but it's important that your ethical obligations don't get lost in the shuffle. In this session, prepare for a smooth transition by reviewing The Rules of Confidentiality and how to:

- Check for any potential client conflicts
- Handle and hand off trust accounts and files
- Give appropriate and ethical notice to clients

*Aviva Meridian Kaiser and Christopher C. Shattuck, State Bar of Wisconsin, Madison*

# CLE Programs & Events

3:40 – 4:30 p.m.

## Substantive Track

### Offer Strong: 5 Tips for Drafting an Offer to Purchase with Teeth

It's a real estate lawyer's worst nightmare: the deal that looked completely solid suddenly falls through and the client asks "what can we do?" This session will teach you techniques for drafting a solid WB-11—one that gives you and your clients as much peace of mind as possible. You'll learn:

- Tips for drafting contingencies that minimize wiggle room to back out
- The clauses that help obtain a money judgment against defaulting buyers
- Strategies for presenting non-standard clauses

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

## Practice Management Track

### Project Management for Law Firms

Most businesses have a process in place for when a big (or small) project comes their way, so they can hit the ground running. Why don't lawyers? In this session, you will learn how to work smarter, not harder. Take your law firm to the next level by learning project management tips for:

- Case management
- Increased capacity
- Resource planning

*Jeffrey M. Glazer, UW Law & Entrepreneur Clinic, Madison*

## Technology Track

### The Frugal Lawyer's Guide to Information Security

Is cost or complexity holding you back from implementing a security plan in your law practice? In this session, you'll discover simple, cost-effective steps that will dramatically increase the security of your firm's information. Learn the basics for protecting your firm from:

- Ransomware
- Hacking
- Data breaches
- Data loss

*Brent J. Hoeft, FirmLock Consulting LLC, Madison*

## Quality of Life/Ethics Track

### To Hire or To Fire: Ethical Concerns

Every business experiences employee turnover, but for attorneys, wrongfully handling hiring and termination matters can lead to ethical missteps and malpractice suits. In this session, we'll review the appropriate circumstances in which a firm can consider hiring or firing staff. Review your rights as an employer, learn how to avoid violating employees' rights, and receive practical guidance on:

- How to give proper notice
- The circumstances in which you should start a search to replace current staff
- The limitations on an employer's right to terminate
- Potential ethical, malpractice, and employment law issues

*Moderator: Thomas J. Watson, Wisconsin Lawyers Mutual Insurance Co., Madison; Brian C. Anderson, Wisconsin Lawyers Mutual Insurance Co., Madison; Aviva Meridian Kaiser, State Bar of Wisconsin, Madison; Jennifer S. Mirus, Boardman & Clark LLC, Madison; Mary Spranger, State Bar of Wisconsin, Madison*

## FRIDAY, OCTOBER 25

8:45 – 10:15 a.m.

### Plenary

### Houdini's Greatest Secret: Unlocking a Path to Personal and Organizational Success

This unique keynote presentation will employ actual magic tricks to disclose amazing secrets about the Wisconsin-raised master magician, Harry Houdini. By observing how Houdini approached his "greatest physical and mental challenge"—an escape in full view from a real hospital straitjacket—you'll be inspired to set (and break through) your own seemingly impossible goals. You'll come away with:

- New techniques for dealing with problems, fears, challenges, and change
- Specific tips for achieving success in your professional and personal life

*Michael Brandwein, Lincolnshire, IL*

10:45 a.m. – 12 p.m.

### Substantive Track

## The Great Debate: Lawyers and Immigration

As lawyers, we understand the rule of law, due process, and the roles of the government. Or do we? In the midst of a heated national debate between our three branches of government, it can be easy to forget that America's immigration system is built on a venerable web of laws. This session will help you separate policy from politics—and law from lore—and provide:

- An overview of the issues impacting immigrant clients
- Tips for avoiding political landmines when immigration-related issues arise in your practice
- How to use your legal skills to help achieve a just outcome

*Reid F. Trautz, American Immigration Lawyers Association, Washington, D.C.*

### Practice Management Track

## Way More than 50 Tips

A recurring favorite, this popular session on life hacks is back and in a newly expanded 75-minute slot. Presented in rapid-fire format, you'll learn technology and practice management tips that will promise to change your life. You will:

- Learn 50+ tips for achieving greater efficiency at work
- Get things done smarter, faster, and maybe even cheaper

*Brett Burney, Burney Consultants LLC, Chagrin Falls, OH; Brent J. Hoeft, FirmLock Consulting LLC, Madison; Jeffrey S. Krause, Affinity Consulting Group, Waterford; Nerino J. Petro, Jr., The Erickson Group, Rockford, IL; Christopher C. Shattuck, State Bar of Wisconsin, Madison; Bryan Sims, Sims Law Firm Ltd., Naperville, IL*

### Technology Track

## Practical Guide to Implementing Encryption and Security on Your Technology

When transmitting sensitive and confidential client and case details within devices, emails, documents, backups, and flash drives, you

need methods and tools to ensure that the information you're storing and sharing is only read by the intended party. Encryption and multi-factor authentication are valuable tools to ensure information makes it only to the right person, but how do you actually enable them? In this session, we'll demonstrate how to:

- Identify the types of info that should only be shared in encrypted formats
- Protect Microsoft files before sending (with technology you probably already have)
- Send and receive encrypted email
- Implement multi-factor authentication on downloaded apps
- Encrypt and store your passwords
- Uncover security blind spots
- Properly "wipe" a device at the end of its life

*Jeremy Cherny, Tobin Solutions Inc., Wauwatosa*

### Quality of Life/Ethics Track

## Technical Capabilities and Ethical Duties: Online Communication and the Rules of Professional Responsibility

The Duty of Competence doesn't just involve possessing a substantive knowledge of law. It also necessitates that attorneys keep up with technology trends. In this session, you will:

- Review how confidentiality affects lawyers' technology usage
- Learn how to safely transmit and dispose of confidential information
- Identify ways to control risk in a small practice environment

*Peyton B. Engel, Hurley Burish, S.C., Madison*

1:45 – 2:35 p.m.

### Substantive Track

## There's No Place Like (Someone Else's) Home? Restrictions on Listing a Home for Vacation Rental

Are there limits to if or how often homeowners can rent out their homes on rental services like Airbnb or VRBO? Do neighbors have any legal means to prevent the house next door from becoming a vacation rental? In this dynamic point-counterpoint session, you'll hear the case for both sides.

# CLE Programs & Events

Topics covered include:

- Zoning and municipal restrictions
- Necessary licenses and permits
- The sanctity of land ownership
- Insurance and liability considerations

*Carol E. Krigbaum, Krigbaum Law LLC, Milwaukee;*  
*Liz Tobolt, Liz Tobolt Law LLC, Hartland*

## Practice Management Track

### How to Speak So People Stay Awake and Do Not Hate You

An effective presentation motivates others to take positive action. Whether you're a beginner or a seasoned presenter, this session will offer valuable techniques for how to create a more engaging, effective presentation—one that doesn't simply involve commenting on dull PowerPoint slides. You will:

- Learn exactly what to say to grab and hold any audience's attention
- Discover fool-proof tips for improving your existing presentations or for creating new ones
- Identify and wipe out extremely common presentation blunders
- Gain confidence in your public speaking abilities

*Michael Brandwein, Lincolnshire, IL*

## Technology Track

### iMazing Presentations from Your iPad

From wirelessly driving a PowerPoint presentation (while using speaker notes) to creating callouts and highlights on the fly in trial, an iPad can do it all and make you look poised at trial. This interactive session will show you exactly how to prepare your iPad for showtime. Bring your iPad and learn:

- How to get files on and off your iPad
- What apps and equipment you need to look flawless
- Tips for creating an "iMazing" presentation

*Brett Burney, Burney Consultants LLC, Chagrin Falls, OH*

## Quality of Life/Ethics Track

### In Case of Emergency, Put Your Mask on First

Between balancing the needs of clients, running a firm, taking care of family, and maintaining friendships, solo and small firm lawyers often have the weight of the world on their shoulders. While well-being is an indispensable part of a lawyer's duty of competence, many busy attorneys often put their health last. Attend this session to hear first-hand experiences of attorneys who've corrected course. You'll gain:

- Tips for getting your groove back (No meditation required)
- Perspective on what behaviors may be unhealthy and strategies for expressing concern about a colleague
- A lawyer well-being toolkit, including an action plan for a healthy workplace

*Nicholas E. Fairweather, Hawks Quindel, S.C., Madison; Comm. Daniel P. Murray, Daniel P. Murray Attorney at Law, Waukesha; Allison M. Ritter, Ritter Law Office LLP, Milwaukee; Mary Spranger, State Bar of Wisconsin, Madison*

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

## Substantive Track

### Thinking About Adding Public Defender Appointments to your Practice? What You Need to Know as Private Bar Counsel

In some northern Wisconsin counties, it can take up to 24 days for the State Public Defender's Office to appoint an attorney for indigent defendants. This session will explore if, when, how, and why attorneys can (or should) accept these appointments. Receive the latest update and analysis of a recent lawsuit filed against the State Public Defender's Office and review:

- The appointment process
- What you need to know to competently represent indigent individuals
- What to consider if criminal law is not currently part of your practice
- The personal and professional benefits of taking appointments

*Blake Gross, H. Craig Haukaas and Kenneth W. Ryder, III, Haukaas Law Office, S.C., Ashland*

**Practice Management Track**
**Motivating Communication: How to Get People to Talk More About What Matters Most**

What clients and others don't tell you can really hurt, especially when you find out too late. This one-of-a-kind session will help you and your colleagues reduce unproductive behaviors like problem avoidance and whining, and teach you techniques for modeling open, full, and prompt communication. You will learn:

- Four direct steps for encouraging direct communication
- Positive problem-solving techniques
- Barriers that interfere with healthy communication and how to eliminate them

*Michael Brandwein, Lincolnshire, IL*

**Technology Track**
**Getting the Most from Microsoft Outlook**

Microsoft Outlook can be an effective email communications tool, but gaining and keeping control over your inbox can sometimes seem futile. This session will bring you closer to that elusive state of email nirvana by demonstrating:

- Strategies and techniques for powering through a cluttered inbox
- Outlook's helpful email features, security settings, and add-ins

*Nerino J. Petro, Jr., The Erickson Group, Rockford, IL; Bryan Sims, Sims Law Firm Ltd., Naperville, IL; Reid F. Trautz, American Immigration Lawyers Association, Washington, D.C.*

**Quality of Life/Ethics Track**
**Becoming a Happy Lawyer Without Finding Work-Life Balance**

Traditional tips for managing work-life balance are not practical for the practicing attorney. Log out of your email and clients call the office to see if you are ignoring them. Take a day off and suddenly you're behind on filing an emergency motion. In this session, you'll learn why achieving work-life balance isn't always realistic, but also, how acknowledging that reality can help you live your best life. This session will explore:

- Why the traditional "5-steps to work-life balance" doesn't work
- Why the constant search for work-life balance is making you unhappy
- How embracing the realities of private practice leads to greater happiness

*Deanne M. Koll, Bakke Norman, S.C., New Richmond*

**3:55 - 4:55 p.m.**

**Plenary**
**Gadgets, Gizmos, and Widgets**

Back by popular demand, this session will give you technological tips to improve your law practice so you can de-stress and enjoy life more. You will learn:

- Tips for getting more from your favorite gadgets and office equipment
- New gizmos that can streamline your work processes

*Brett Burney, Burney Consultants LLC, Chagrin Falls, OH; Nerino J. Petro, Jr., The Erickson Group, Rockford, IL; Bryan Sims, Sims Law Firm Ltd., Naperville, IL*

**SATURDAY, OCTOBER 26**

**7:30 - 8:20 a.m.**

**Plenary**
**Substantive Law at Sunrise**

Whether you have a specific or general law practice, you still need to be familiar with a range of substantive law issues. This rapid-fire primer will familiarize you with practice areas that every solo practitioner should know about. You'll learn:

- What's new in real estate, bankruptcy, family law, intellectual property, and criminal defense
- How to refer clients with needs outside your practice
- Confidence-building tips for adding a new practice area

*Kate Knowlton, Knowlton Law Group LLC, Wauwatosa; J. David Krekeler, Krekeler Strother, S.C., Madison; Sarah L. Ruffi, Ruffi Law Offices, S.C., Wausau; Anne Wal, von Briesen & Roper S.C., Milwaukee; Michael Seung-Hyock Yang, MY Law Office LLC, Madison*

# CLE Programs & Events

8:30 – 9:20 a.m.

## Substantive Track

### Advising Small Businesses Regarding Tax Liability

The past year has brought big changes for small businesses regarding tax liability. The Tax Cut and Jobs Act (TCJA) made significant changes to the corporate income tax and taxes on pass-through businesses, including S-Corporations. Meanwhile, a recent Supreme Court decision held that states can hold out-of-state retailers liable for use tax on their customers' purchases. This session will address:

- Practical implications of the TCJA for small service corporations
- Summary of key 2019 tax developments
- Application of the Qualified Business Income Deduction to your firm, and your client's business
- Planning for state sales and use tax on remote sales
- A brief overview on how to help your clients reduce their property tax liability

*Alison E. Helland, Boardman & Clark LLP, Madison;  
Douglas A. Pessefall, Reinhart Boerner Van Deuren,  
S.C., Milwaukee*

## Practice Management Track

### Promoting Diversity Through Special Business Designations

Co-produced with: Diversity & Inclusion Oversight Committee

Obtaining certification or representing clients designated as a Minority Business Enterprise, Women-Owned Business Enterprise, or Disabled Veteran Business Enterprise can increase a business's competitive advantage. This session will offer insights on:

- The steps to obtaining a minority-owned business designation
- How MBE-certified businesses positively impact individuals and communities
- The economic advantages of seeking certification

*Emery K. Harlan, MWH Law Group LLP, Milwaukee;  
Michael Seung-Hyock Yang, MY Law Office LLC,  
Madison*

## Technology Track

### The Amazing Value of Video Conferencing

From one-to-one conference calls to multi-party settlement conferences, video is more useful than ever before. Yet, while video technology opens up a world of possibilities for both small and large law firms, many lawyers report still feeling uncomfortable using video. Others lament that web conversations lack human connection and aren't "real" meetings. This session will help you become more confident in your skills by covering:

- The benefits of digital discussions
- What tools to use
- Confidentiality and security concerns
- Tips and ideas to be your best

*Nerino J. Perro, Jr., The Erickson Group, Rockford, IL; Reid F. Trautz, American Immigration Lawyers Association, Washington, D.C.*

## Quality of Life/Ethics Track

### Protecting Client Information – How to Win When Fighting Technology

Explore the risks of digitally communicating with clients and learn techniques for how to safely transmit information in the 21st century. You will:

- Review your obligations under the Duty of Competence
- Explore ways to protect client information
- Discuss proper usage of social media
- Learn what technology traps to avoid

*Dean R. Dietrich, Dietrich VanderWaal Law Group, S.C., Wausau*

9:50 – 10:40 a.m.

## Substantive Track

### Blockchain and Smart Contracts

"Blockchain" and "smart contracts" used to be futuristic buzzwords, but nowadays, businesses are regularly employing blockchain-powered, self-executing contracts or "smart contract technology." These technologies have the potential to bring massive transactional efficiencies to every aspect of transactional and commercial life, in

all industries, across the globe. In this session, you'll learn:

- What blockchain, artificial intelligence, and smart contracts are
- How these new technologies are deployed
- What legal issues you should be aware of when working with clients using these technologies

*Jeffrey M. Glazer, Ogden, Glazer + Schaefer LLC, Madison*

### Practice Management Track

#### Check Your Attitude, Win Your Case

Get ready for a fast paced, interactive workshop that will empower you and your clients to view life events in a whole new way. Learn how to view the circumstances in your clients' cases as neutral, so you can diffuse negative energy and tension that keeps you from developing a strong strategy. Build a strong case and drive your desired outcome by learning how to:

- Define the goal of representation
- Take ownership of how your attitude affects a situation's results
- Refocus your perspective
- Move toward your goal with a clear head and confident attitude

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

### Technology Track

#### Ask the Tech Guys: Law Firm Technology Workshop

Do you want to implement more technology into your law practice, but don't know where to start? Do you have questions on what tools are available, or how to implement options you've already found?

During this session, you will:

- Get recommendations for tech tools for solo and small law firms
- Find out what tools may be a good match for your tech ability
- Learn the best ways to start implementing new tools into your practice
- Have the opportunity to ask all of your lingering tech questions

*Brent J. Hoeft, FirmLock Consulting LLC, Madison;  
Christopher C. Shattuck, State Bar of Wisconsin, Madison*

### Quality of Life/Ethics Track

#### Ins and Out of (In)Active Practice in Wisconsin

Only active and emeritus State Bar members may practice law in Wisconsin. This session will cover best practices for lawyers who are looking to take a timeout from practice or assume a non-attorney career role. We'll explore the quasi-legal roles an inactive Wisconsin lawyer can participate in that don't require reactivating membership, how to reframe your communication to avoid inadvertently giving legal advice, as well as how to position yourself to re-enter practice. Learn how to:

- Assess whether to go inactive
- Prepare your clients (and your files) for the transition
- Rephrase business communication so it's not mistaken for legal advice
- Return to active practice after a hiatus, sabbatical, or extended medical leave

*Scott E. Mickelson, Total Administrative Services Corporation, Madison*

**10:50 a.m. – 12:15 p.m.**

### Plenary

#### The Fine Art of Getting Paid ... Ethically

For many lawyers, recording time, billing clients, and getting paid is the worst part of running a practice. This session will help you improve your processes so you can boost your client relationships and capture more of what you've earned! You will learn how to:

- Create an ethical and profitable representation agreement
- Set fees for your clients
- Avert ethical and financial troubles
- Avoid accounts receivable

*Reid F. Trautz, American Immigration Lawyers Association, Washington, D.C.*

# 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

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- 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 22-26 if you reserve by September 23. 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 conference rates, visit <https://book.passkey.com/e/49882966> by September 23.

	Tues. 10/22	Wed. 10/23	Thurs. 10/24	Fri. 10/25	Sat. 10/26
Standard room	\$119	\$129	\$129	\$159	\$159
Two-room family suite	N/A	N/A	\$229	\$259	\$259
Royal African Queen suite	\$229	\$229	\$229	\$259	\$259
Lodge suite	N/A	N/A	\$159	\$199	\$199
Combination suite	N/A	N/A	\$299	\$359	N/A



# Sponsors and Exhibitors



# 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.

## Cancellations

Registration cancellations received by 4:30 p.m. CT on October 10, 2019, 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 2019 will be submitted to the Wisconsin Board of Bar Examiners for up to 15.5 CLE which includes 7.0 EPR; 6.0 LPM; and 5.0 LAU credits. You can earn additional credits by watching complimentary webcast replays of selected CLE sessions in November and December.

## Guest Packages

When you add a guest package, the guest will be automatically registered for the included events. Please note that a conference name badge is required for entry to all WSSFC events. **Guest Package** includes breakfasts, breaks, opening reception, and hospitality suite. **Guest lunches:** If your guest(s) will be attending Thursday and/or Friday lunches, please register each guest for the appropriate options.

## 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 2019 Planning Committee

### Executive Committee

Nerino J. Petro, Jr. - Conference Chair

Sarah L. Ruffi - Past Chair

Nancy L. Trueblood - Chair-Elect

Timothy Clark - PINNACLE Seminars Division Manager

Barbara Moddes - PINNACLE Program Planner

### Plenary Committee

Kathleen A. Brost

Johanna R. Kirk

Jeffrey S. Krause

Sarah L. Ruffi

Christopher C. Shattuck

Nancy L. Trueblood

### Substantive Law Track

Sara M. Drescher

Kate Knowlton

### Practice Management Track

Jeffrey S. Krause

Sarah L. Ruffi

### Technology Track

Brent J. Hoeft

Nerino J. Petro, Jr.

### Ethics/Quality of Life Track

Paul F. Angel

J. David Krekeler



## EARN EVEN MORE CREDITS AFTER THE CONFERENCE !

Worried about missing a breakout session? Watch for this symbol! We will record select sessions of the Conference and webcast them at a later date. All attendees can watch the first two dates of each replay free! **That's up to 9 additional credits!**





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Find more information at [wssf.org](http://wssf.org)