

# OUR FIRST VIRTUAL CONFERENCE IS CLEARED FOR TAKEOFF!



STATE BAR OF WISCONSIN

## 2020 Solo & Small Firm Conference

It's the same WSSFC you've always known.  
In a brand new atmosphere.

October 28-30, 2020

**REGISTER BY OCTOBER 9 AND SAVE!**

**Earn up to 15.5 credits**

**Visit [wssfc.org](http://wssfc.org)**



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 – from other lawyers like you. Plus, speak with friendly, helpful exhibitors about your legal needs at the Virtual Legal Expo – either privately or in group chats.



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.

# Prepare for takeoff with our first virtual Solo and Small Firm Conference



This year, WSSFC is headed to the cloud. Take to the cyber skies from any location you choose. Log on, engage, sit back, and enjoy the ride. Learn how to avoid turbulence as you navigate your firm's everyday challenges along with other practitioners like you.

## Same high-quality conference. Different atmosphere.

- Experience amazing live plenary sessions, interactive breakout sessions, and insights from seasoned practitioners and renowned presenters
- Participate in fun, interactive social events, meet new colleagues, and expand your circle
- Help your office soar with tools, charts, checklists and resources that are immediately available to download
- Interact with fun, friendly, helpful legal exhibitors, and score awesome prizes

# Our easy-to-use platform offers a first class experience for all attendees.

Attendees can experience the full conference from a desktop, tablet, or smartphone/mobile device.

Your “luggage” won’t get lost! Each attendee has a briefcase filled with exhibitor collateral and conference documents to ensure the best conference journey possible. You can save, view, share, or download these items throughout the event. You can save, view, share, or download these items throughout the event.

You’ll even be able to come back to the virtual environment and view some content after the event.\* However, to be able to interact with your peers and sponsors, we recommend attending the “live” event.

From one easy login, you’ll be able to experience CLE sessions, the Legal Expo, and social events in one online platform. One click gets you access



to the conference. No need to keep track of phone numbers, participant IDs, or access codes. Have a question or need help finding something? Stop by the Help Desk to connect with our friendly flight crew who can help you navigate through the platform and get you to where you need/want to go.

\*Viewing content in the platform will be limited to 30 days after the event. No CLE credit may be obtained from the virtual platform after the live event. As an attendee, you will have access to select webcast replays at no additional charge.

## A Virtual Legal Expo – Designed just for you!

Be sure to check out the Virtual Legal Expo! Learn about products and services designed just for solo and small-firm practitioners – and have your virtual Passport to Prizes signed by each exhibitor for the chance to win over \$2,500 worth of prizes, including gift certificates to PINNACLE books and seminars, the Annual Meeting and Conference, a free Ultimate Pass, and tech gadgets for your home or office.

*The WSSFC Exhibit Hall is like no other. It saves me time researching software and equipment. I am always re-energized after talking with the reps and love new ideas to bring back to my office.*

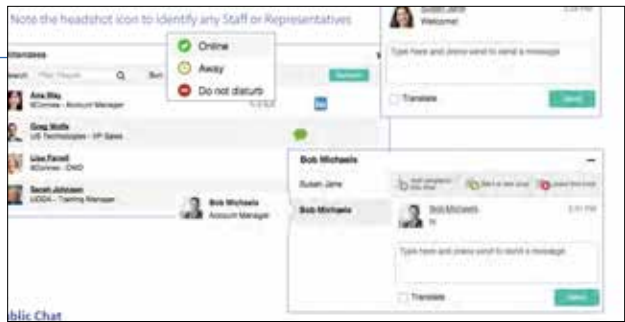
- Todd Schlusche, Schluesche Fields S.C.

*What’s great about the WSSFC Exhibit Hall is that I’ve been in practice too. I know the obstacles that small firms face, and I am able to relate to them on another level. I’ve provided tips and resources to people I’ve met in my booth that have nothing to do with the products and services I offer in the booth.*

- Past Exhibitor



# Interacting with other attendees is easy!



Sometimes you learn just as much from the people you meet at conferences as you do from the lectures you attend.

This year, the venue may be different, but there will still be opportunities for you to meet people at every turn, and build and maintain fruitful connections. Through our state-of-the-art platform, you'll be able to strike up conversations with speakers, exhibitors, State Bar staff and leadership, and new acquaintances."

*Each time I've come to this I've made connections that's led to work down the line.*

- Past Attendee

*The connections that I've made I'm sure are going to bear fruit for much longer than the couple of days that I've been here.*

-Past attendee

## Chat functions are accessible all throughout the platform.

To get the most out of your conference experience, make sure to complete your online profile so you can easily connect with other

attendees by geographic location or area of practice. You can also link to your LinkedIn page and add a photo so attendees can easily identify you.

### Other chat features include:

- Both public and private chat functions
- Multiple simultaneous 1:1 chat capabilities
- Keep track of all chats via the sidebar
- Post a comment for viewing by all attendees
- Browse previous comments
- View a list of who's participating in the chats

Other valuable interactions can occur in our cozy Wisconsin themed Networking Lounge or with our Virtual Legal Expo representatives via social media, email, or and the built-in chat forums. It sure beats walking across a large facility. Just click and chat. It's that easy!

Plus, we've upped our gamesmanship with more fun ways to be introduced to other solo and small firm practitioners and exhibitors. And don't forget - our prize packages always surpass expectations. This year's virtual conference is no exception!

## Ultimate Pass Gold Is Your Ticket to WSSFC

Attend WSSFC 2020 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

Substantive Law  
  Practice Management  
  Technology  
  Ethics/Quality of Life

## WEDNESDAY – October 28, 2020

Time	Event
4:00 p.m. - 5:15 p.m.	<b>Welcome and Plenary Session:</b> Substantive Law at Sunset
	Legal Expo and Concierge Desk are Open
5:15 p.m.	Kick Off the (Virtual) Conference

## THURSDAY – October 29, 2020

Time	Event
8:00 a.m. - 5:00 p.m.	Legal Expo and Concierge Desk are Open
8:30 - 10:00 a.m.	<b>Plenary:</b> Headless Chickens and Zombie Data: Your Ethical Obligations for Disasters and Data Breaches
10:00 - 10:10 a.m.	Break
10:10 a.m. - 11:00 a.m.	A Primer on Residential Real Estate Transactions
	Mastering Meetings from Anywhere
	Making the Leap to Microsoft 365: How to Leverage Your Law Office Productivity Suite
	Dealing with Conflicts in a Small Firm Setting
11:00 - 11:10 a.m.	Break
11:10 a.m. - 12:00 p.m.	Outside Issues in Real Estate
	Managing a Remote Workforce
	Automating Your Law Firm with Zapier and IFTTT
	The Intersection of Ethics and Lawyer Well-Being
12:00 p.m. - 1:00 p.m.	Lunch Break
1:00 p.m. - 1:15 p.m.	Presentation of the 2020 Lederer Award
1:15 p.m. - 2:30 p.m.	<b>Plenary:</b> Lessons Learned from COVID-19
2:30 p.m. - 3:45 p.m.	Motions to Dismiss in Business Litigation in Wisconsin - A New Landscape
	More than 50 Tips
	The Power of Video: Create DIY Videos to Educate Clients and Market Your Firm
	Decide to Thrive: The Case for Lawyer Well-Being & the Wisconsin Lawyer Well-Being Task Force
3:45 p.m. - 3:55 p.m.	Break
3:55 p.m. - 4:55 p.m.	Keeping Main Street Open: Four Ways the Small Business Reorganization Act Can Help Your Business Clients Stay in Business
	How Systems and Processes Can Reduce Your Stress Level
	Basic Technology You'll Need to Set Up a Law Office
	Creating Engagement Agreements That Work for You and Are Ethical, Too!
4:45 p.m. - 6:00 p.m.	Bring Your Own "Boos" Halloween Hangout

# Conference Schedule

Substantive Law
  Practice Management
  Technology
  Ethics/Quality of Life

FRIDAY – October 30, 2020	
Time	Event
8:30 a.m. - 10:00 a.m.	<b>Plenary:</b> You Be the Judge (But Should You Be?)
10:00 a.m. - 10:10 a.m.	Break
10:10 a.m. - 11:00 a.m.	Completing or Diversifying Practice with Multidistrict Litigation
	Staying Connected Apart: Successful Videoconferencing
	Audio and Video Deepfakes: What Lawyers Need to Know
	Rankings, Ratings, and Reviews: The Ethics of Social Media
11:00 a.m. - 11:10 a.m.	Break
11:10 a.m. - 12:00 p.m.	Fluff is for Pillows, Not Legal Writing
	Effective Delegation
	From Bad to Worse: Current Trends and Threats in Cybersecurity
	How to Partner: Choosing Partners and Merging Firms
12:00 p.m. - 1:00 p.m.	Lunch Break
1:00 p.m. - 2:15 p.m.	<b>Plenary:</b> Plenary: How Millennials Will Change 3 Key Ethics Concepts
2:15 p.m. - 2:30 p.m.	Break
2:30 p.m. - 3:20 p.m.	Strategies for Dealing with Insolvent or Heavily Indebted Estates
	Igniting or Re-igniting the Passion for Practicing Law
	Practice Management Software: The Good, The Bad, and The Ugly
	The Ethics of Being a Board Member
3:20 p.m. - 3:30 p.m.	Break
3:30 p.m. - 4:30 p.m.	<b>Plenary:</b> Gadgets, Gizmos & Widgets

## Sponsors & Virtual Exhibitors



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Where Attorneys Go To Hire Freelance Lawyers



## WEDNESDAY, OCTOBER 28, 2020

4:00 p.m. - 5:15 p.m.

### Welcome and Plenary Session

#### CLE at Sunset (1.0 CLE)

Whether you have a specific or general law practice, you still need to be familiar with a range of substantive law issues. This fast-paced, rapid-fire primer will provide solos with a base understanding of:

- Guardianship
- Estate planning
- Recreational liability
- Advising small business clients
- Agricultural law

*Kathleen A. Brost, Legacy Private Trust Co.; Johanna R. Kirk, Kirk Law Office LLC; J. David Krekeler, Krekeler Strother, S.C.; Alexander Pendleton; Pendleton Legal, S.C.; Troy R. Schneider, Twohig Rietbrock Schneider & Halbach, S.C.*

## THURSDAY, OCTOBER 29, 2020

8:30 a.m. - 10:00 a.m.

### Plenary Session

#### Headless Chickens and Zombie Data: Your Ethical Obligations for Disasters and Data Breaches (1.5 EPR)

Not so long ago, locking up your paper files was sufficient to satisfy compliance with ABA Model Rule of Professional Conduct 1.15. Today, disasters and data breaches present whole new threats to safeguarding client property.

In this session, the President and Vice President of Sensei Enterprises, Inc. – a managed IT service provider, digital forensics and managed cybersecurity firm – will guide you through your ethical duties and provide practical examples on how to best protect your clients' information in an ever-evolving, unpredictable world.

You'll discuss:

- Ethical standards set forth by the ABA's rules on Communications and Confidentiality of Information
- ABA Formal Opinion 483: Lawyers' Obligations After an Electronic Data Breach or Cyberattack

- Formal Opinion 482: Ethical Obligations Related to Disasters
- How to resolve conflicting priorities caused by disasters and data breaches
- What to do when duties of disclosure and confidentiality compete for your attention

*Sharon D. Nelson, Sensei Enterprises, Inc.; John W. Simek, Sensei Enterprises, Inc.*

10:10 a.m. - 11:00 a.m.

### Substantive Law

#### A Primer on Residential Real Estate Transactions (1.0 CLE)

Although real estate transactions can be long and drawn out, this session will be the opposite: short, sweet, and to the point. Presenters will show you how to handle a real estate purchase from start to closing in under an hour.

You'll learn best practices in the industry, as well as:

- Standards forms used in most transactions
- Common issues to watch for
- Tips to evaluate title commitments
- How to handle closings

*Sara B. Andrew, Andrew Law Offices, SC; Carol Krigbaum, Krigbaum Law, LLC*

### Practice Management

#### Mastering Meetings from Anywhere (1.0 LPM)

Don't you just hate meetings? They are a waste of time, they keep you from your real work and nothing is ever accomplished. Meetings do not have to be like that. In this session, we'll conduct an actual meeting. As we meet, you will learn how to run a focused meeting, stick to an agenda, ensure that everyone contributes and that everyone leaves with a specific set of tasks for next time. Whether you are meeting with clients or with your team, people will never again think your meetings are a waste of time.

*Stacy Devlin, Director of Client Success, Affinity Consulting; Deanne M. Koll, Bakke Norman, S.C.; Jeffrey S. Krause, Affinity Consulting; Michael Seung-Hyock Yang, MY Law Office LLC*

# CLE Programs & Events

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## Technology

### **Making the Leap to Microsoft 365: How to Leverage Your Law Office Productivity Suite (1.0 LPM)**

Microsoft365 not only includes traditional Office software like Word and Excel, but now, it also has robust features such as online storage, group communications, and more. In this session, you'll discover how to make the most of the Microsoft365 suite.

The presenters will help you:

- Understand which subscription delivers the value you're looking for
- Discover useful features that can save you time and money
- Leverage Microsoft365 and boost your office's productivity

*Nerino J. Petro, Jr., The Erickson Group; Bryan Sims, Sims Law Firm Ltd.*

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## Ethics/Quality of Life

### **Dealing with Conflicts in a Small Firm Setting (1.0 EPR)**

Conflicts of interest are a critical aspect of any legal practice. Conflicts in small firm and small community situations, however, can be particularly challenging.

In this presentation, you will:

- Review conflict of interest rules
- Go over the applicable rules for lawyers working in a solo and small firm setting
- Engage in group discussions about ethical considerations in hypothetical scenarios

*Dean R. Dietrich, Dietrich VanderWaal, S.C.*

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**11:10 a.m. - 12:00 p.m.**

## Substantive Law

### **Outside Issues in Real Estate (1.0 CLE)**

Program description TBA

*Carol Krigbaum, Krigbaum Law, LLC; Liz Tobolt*

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## Practice Management

### **Managing a Remote Workforce (1.0 LPM)**

When finding quality employees presents a challenge, you can expand your pool of quality candidates with one simple change - allow some or all of them to work from home. If you think this is impossible, attend this session

and learn how managing a successful remote workforce is not only possible but can also be highly profitable.

*Faculty TBA*

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## Technology

### **Automating Your Law Firm with Zapier and IFTTT (1.0 LPM)**

Ever wished the web apps and software you use in your practice could "talk" to each other? Ever wished you could increase efficiency and productivity by automating the steps you take to get information from one software program to another?

In this session, you'll learn how automation platforms like Zapier and IFTTT can save your staff time by automating and streamlining processes such as:

- Intake
- Document management and sharing
- Email
- Scheduling
- Taskj lists
- Billing
- And more!

*Bryan Sims, Sims Law Firm Ltd.*

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## Ethics/Quality of Life

### **The Intersection of Ethics and Lawyer Well-Being (1.0 EPR)**

There is a very strong link between lawyer well-being and a lawyer's duty of competence. Lawyers who struggle with substance abuse issues, mental health problems, stress, and exhaustion risk violating multiple Rules of Professional Conduct. As more firms recognize that "to be a good lawyer, you have to be a healthy lawyer" and implement wellness programs, themes are emerging as to which approaches seem to be working and which ones are falling flat.

In this presentation, you will:

- Hear real-life stories of lawyers who ran afoul of their ethical obligation
- Discuss 9 Rules of Professional Conduct impacted by lawyer well-being
- Gain practical advice for responding to struggling colleagues

*Sharon D. Nelson, Sensei Enterprises, Inc.; John W. Simek, Sensei Enterprises, Inc.*



1:15 p.m. - 2:30 p.m.

Plenary Session

**Plenary: Lessons Learned from COVID-19 (1.5 LPM)**

In this panel session, Wisconsin lawyers and legal practice consultants will reflect on the lessons they've learned during the pandemic about managing a solo or small firm. They'll offer practical advice on how to:

- Regain your footing if your practice is still struggling to recover from the "Great Quarantine"
- Position your practice to thrive in the coming months and years

*Lori Dorn, Stafford Rosenbaum; Jeffrey S. Krause, Affinity Consulting Group; J. David Krekeler, Krekeler Strother, S.C.*

2:40 p.m. - 3:45 p.m.

Substantive Law

**Motions to Dismiss in Business Litigation in Wisconsin - A New Landscape (1.0 CLE)**

This program will help business lawyers and civil trial attorneys better understand recent important decisions in Wisconsin pleading standards and how the current Wisconsin rules concerning motions to dismiss compare to the federal rules concerning similar motions. Attendees will benefit from this timely discussion as it relates in part to a 2019 Wisconsin Supreme Court decision relating to motions to dismiss.

You'll be more equipped to:

- Advise clients on whether they should bring a motion to dismiss a particular claim or lawsuit
- Understand whether a particular motion to dismiss is likely to succeed
- Draft effective complaints

*Hon. Michael R. Fitzpatrick, Wisconsin Court of Appeals, District IV; Kathy Nusslock, Davis & Kuelthau, S.C.; Alexander Pendleton, Pendleton Legal, S.C.*

Practice Management

**More than 50 Tips (1.5 LPM)**

A WSSFC favorite and back by popular demand, our rapid fire tips and tricks session is sure to have something for everyone. Discover software, hardware, social media, productivity, security, cloud computing, mobile devices, apps, and more!

*Jeffrey S. Krause, Affinity Consulting; Nerino J. Petro, Jr., The Erickson Group, Inc.; Christopher C. Shattuck, State Bar of Wisconsin; Bryan M. Sims, Sims Law Firm, Ltd.*

Technology

**The Power of Video: Create DIY Videos to Educate Clients and Market Your Firm (1.5 LPM)**

Do you shy away from using video to market your practice? Are you convinced that filming videos is too much of a hassle? Then this session is for you!

Attendees will discover how to modernize their firm marketing by learning:

- What equipment and software you'll need to get started
- How to pick the "right" platform to convey your message
- How to post videos to YouTube, Instagram, and Facebook

*Philip Hinkle, State Bar of Wisconsin; Erin R. Ogden, Ogden, Glazer + Schafer; Nerino J. Petro, Jr., The Erickson Group*

Ethics/Quality of Life

**Decide to Thrive: The Case for Lawyer Well-Being & the Wisconsin Lawyer Well-Being Task Force (1.5 LAU)**

This session will provide an update on the status and work of the Wisconsin Lawyer Well-Being Task Force – a coalition of entities charged with catalyzing a movement to improve well-being in a notoriously results-driven, hard-charging culture.

Attendees will gain practical tools to begin making positive changes in their own lives, and come away with a deeper understanding of:

- Why ignoring wellness is bad for business
- The personal and professional costs of poor lawyer well-being

# CLE Programs & Events

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- How to thrive in a demanding career
- Proven and practical tools for immediate and effective implementation

*Mary Spranger, State Bar of Wisconsin; Julie Krolczyk, Reveal Your Power*

**3:55 p.m. - 4:45 p.m.**

## Substantive Law

### **Keeping Main Street Open: Four Ways the Small Business Reorganization Act Can Help Your Business Clients Stay in Business (1.0 CLE)**

In the late 1980s, Congress created Chapter 12 because Chapter 11 was not working for farmers. Finally, in 2019, Congress created a less expensive process for small businesses: the Small Business Reorganization Act (SBRA). The SBRA is a true game changer, and this presentation will explore when the Act is an appropriate option for struggling small-business clients.

You'll review:

- How the SBRA can help struggling lawyers stay in practice
- The new relief available to small businesses
- Which businesses might be candidates for relief under the SBRA
- Ways SSF lawyers can help clients prepare for an SBRA filing

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

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## Practice Management

### **How Systems and Processes Can Reduce Your Stress Level (1.0 LPM)**

It is almost impossible to be completely prepared for sudden and unforeseen events like national emergencies, natural disasters and sudden employee departures. In tumultuous times, firms with well-conceived and well-documented processes are much better prepared to ride out the storm. Give yourself and your staff peace of mind by implementing systems so you don't find yourself asking, "what do we do now?"

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

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## Technology

### **Basic Technology You'll Need to Set Up a Law Office (1.0 LPM)**

With so many technological advances and options to choose from, figuring out what is necessary to set up a modern law office can be challenging. Do you need a desktop computer or will a laptop work? What are the options for phone service? What basic software should you get?

In this session, presenters will share:

- The basic level of technology to get up and running
- Factors to consider including functionality, flexibility, cost effectiveness, and security
- How to take your practice up a notch

*Stephanie L. Melnick, Melnick & Melnick; Christopher Shattuck, State Bar of Wisconsin; Bryan Sims, Sims Law Firm Ltd.*

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## Ethics/Quality of Life

### **Creating Engagement Agreements That Work for You and Are Ethical, Too! (1.0 EPR)**

Engagement agreements serve many purposes. They contain information required by the Rules of Professional Conduct. They are one of the lawyer's first steps in establishing a professional relationship with a client. They are contracts. They manage a lawyer's risk and establish expectations. And they are a written representation of the lawyer's brand.

In this workshop, you'll learn how to tailor agreements to meet your specific needs as well as your client's. You'll discuss how to:

- Identify an agreement's purposes
- Select the right provisions
- Avoid errors when using handed-down fee or engagement agreements
- Improve your writing and enhance readability

*Aviva Meridian Kaiser, State Bar of Wisconsin*

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**FRIDAY, OCTOBER 30, 2020**

**8:30 a.m. - 10:00 a.m.**

**Plenary Session**

**You Be the Judge (But Should You Be?) (1.5 LAU)**

In this lively, interactive session, attendees will see how the way that they view others – and how others view them—could be affecting their practice of law. You'll learn:

- What science says about bias
- The ways bias can impact your practice and hurt your bottom line
- How to recognize your own implicit bias and better serve your clients

*Sarah Redfield, Professor Emerita, University of New Hampshire School of Law*

**10:10 a.m. - 11:00 a.m.**

**Substantive Law**

**Completing or Diversifying Practice with Multidistrict Litigation (1.0 CLE)**

Program description TBA

*Faculty TBA*

**Practice Management**

**Staying Connected Apart: Successful Videoconferencing (1.0 LPM)**

COVID-19 forced a paradigm shift on most firms from primarily working from an office to working remotely. For many employees, this sudden change prompted an urgent need to understand and utilize videoconferencing platforms.

In this session, presenters will share their observations on how the transition has gone and where firms are at now. They'll also provide real time instruction on how to make the most of leading videoconferencing tools.

You'll learn:

- Important settings and features in Zoom and other meeting platforms
- Tips and tricks for improving audio and video
- How to use built-in-tools to make meetings more secure, effective, and interactive

*Terry L. Dunst, Bakke Norman, S.C.; Brent Hoeft, FirmLock Consulting, LLC ; Karen Renee, President, eCourt Reporters*

**Technology**

**Audio and Video Deepfakes: What Lawyers Need to Know (1.0 LPM)**

While we are learning to take much of what we read on the Internet with a grain of salt, people still tend to trust their eyes and ears when browsing. Deepfake content – realistic looking photos and videos of people saying and doing things that they didn't actually say or do – is growing at a rapid rate online and is already wreaking havoc around the world. This timely presentation will examine how prepared the legal profession is to deal with the reality of deepfakes.

You'll discuss:

- The AI that creates deepfakes
- Necessary tools to test the validity of evidence
- Implications on the Rule of Law
- The role of ethics in cases involving deepfakes

*Sharon D. Nelson, Sensei Enterprises, Inc.; John W. Simek, Sensei Enterprises, Inc.*

**Ethics/Quality of Life**

**Rankings, Ratings, and Reviews: The Ethics of Social Media (1.0 EPR)**

Everyone is using social media and other digital strategies to market their law practice. The COVID-19 pandemic has only increased this use, as people have curtailed their in-person and in-office contacts. Lawyers need to understand their responsibilities as the practice becomes more intertwined with social media.

In this presentation, attendees will review the dos and don'ts of using social media under the Rules of Professional Conduct. You'll discuss how to:

- Ethically participate in social media
- Solicit clients through social media platforms
- Correct and respond to negative postings

*Dean R. Dietrich, Dietrich VanderWaal, S.C.*

# CLE Programs & Events

11:10 a.m. - 12:00 p.m.

## Substantive Law

### Fluff is for Pillows, Not Legal Writing (1.0 CLE)

In this program, attorneys will learn how to improve their writing skills through a new paradigm called “the Surgical Strike.” By writing in plain English and by placing renewed relevance on the building blocks of writing, attendees will discover how to communicate more directly, concisely, and clearly.

You'll get the lowdown on:

- The technicalities of sentence structure
- Stuart's “Shortwriting” method for reducing long sentences
- “The only punctuation you'll ever need to know”

*Stuart I. Teicher, Esq., The CLE Performer*

## Practice Management

### Effective Delegation (1.0 LPM)

You know you're going to burn out if you keep trying to do everything, but you're worried that nobody does the work as well as you and delegating (then correcting the work) takes more time than just doing it yourself, right? Attend this eye-opening session to break down the elements of an effective delegation processes and see how you can:

- Leverage your time and expertise
- Facilitate the control of your time
- Provide opportunities to train your team
- Keep your office running like a well-oiled machine, even when you're gone

*Chris Carman, ActionCOACH Business Coaching;*  
*Sarah L. Ruffi, Ruffi Law Offices, S.C.*

## Technology

### From Bad to Worse: Current Trends and Threats in Cybersecurity (1.0 LPM)

Cyber threats are persistent and ever-changing. In the past year, ransomware has made an even more disturbing evolution from ransom to blackmail and extortion, causing even more serious ramifications for law firms. In this unfortunately timely presentation, you'll

hear from Brent Hoeft, believer in the virtual law office model and owner of his own web-based practice. He'll share:

- Current cyber trends and threats affecting law firms
- Recommendations on how to best protect your firm from being victimized

*Brent Hoeft, FirmLock Consulting, LLC*

## Ethics/Quality of Life

### How to Partner: Choosing Partners and Merging Firms (1.0 EPR)

Small firms often engage in lateral moves of lawyers. And increasingly, large firms are moving into smaller communities and merging with smaller firms. In this presentation, attendees will review their responsibilities when:

- Changing firms
- Hiring partners
- Blending two practices

*Joseph W. Boucher, Neider & Boucher, S.C.; Alison E. Helland, Boardman & Clark, LLP; Timothy J. Pierce, State Bar of Wisconsin*

1:00 p.m. - 2:15 p.m.

## Plenary Session

### How Millennials Will Change 3 Key Ethics Concepts (1.5 EPR)

Millennials are bringing a changed mindset to law practice, and that's good. It also means that this changed way of approaching practice will likely alter some key ethics concepts.

No matter which generation you fall into, this program will prepare you for ethics changes on the horizon. Stuart Teicher will offer advice on how to interact with clients and employees accordingly, specifically focusing on:

- Communicating
- Supervising
- Advising

*Stuart I. Teicher, The CLE Performer*

**2:30 p.m. - 3:20 p.m.****Substantive Law****Strategies for Dealing with Insolvent or Heavily Indebted Estates (1.0 CLE)**

America doesn't just run on Dunkin', it also runs on debt. With most Americans carrying some form of debt, this presentation will prepare you for a likely scenario: dealing with a client's insolvent or heavily indebted estate. You'll gain strategies for dealing with:

- Unpaid medical bills
- Credit cards
- Mortgages
- Car loans

*Alexander L. Ullenberg, Ullenberg Law Offices SC*

**Practice Management****Igniting or Re-igniting the Passion for Practicing Law (1.0 LAU)**

It is easy to question whether you are on the right path during times of great stress. If the past year has tested your passion and dedication, you are not alone. Attend this motivational session to begin re-igniting that passion and pursuing your legal career with a new sense of purpose.

*Stuart I. Teicher, The CLE Performer*

**Technology****Practice Management Software: The Good, The Bad, and The Ugly (1.0 LPM)**

Practice management software is one of the best investments your firm can make. But how do you decide between local and cloud versions? What features do you need? How do the current leaders in this marketplace compare?

In this session, you'll get the latest scoop on practice management software and learn all about:

- The latest features everyone's talking about
- Current price ranges and pricing structures
- How various brands compare, including benefits and potential issues

*Jeff Krause, Affinity Consulting Group LLC;  
Christopher Shattuck, State Bar of Wisconsin*

**Ethics/Quality of Life****The Ethics of Being a Board Member (1.0 EPR)**

Many attorneys volunteer and serve on nonprofit boards of directors. These efforts should be encouraged; however, it's important that attorneys understand all of their duties as board members.

In this presentation, you'll review:

- Nonprofit board members' duties
- When and how board member service may cross over with ethical requirements under the Rules of Professional Conduct

*Kimberly A. Shaul, General Counsel and Board Secretary, National Guardian Life Insurance Co.;  
Barbara J. Zabawa, Center for Health and Wellness Law, LLC*

**3:30 p.m. - 4:30 p.m.****Plenary Session****Gadgets, Gizmos & Widgets (1.0 LPM)**

Back by popular demand, this fun, high-energy session will shower you with technological and practice management tips. From ways you can save a few dollars to hacks for making the most out of tools you use every day, this session will enable you to destress and enjoy life more.

You'll discover:

- How to get more from your favorite gadgets and office equipment
- New gizmos that can streamline your work processes
- Product recommendations for improving and maintaining your office technology

*Nerino J. Petro, Jr., The Erickson Group; Bryan Sims, Sims Law Firm Ltd.*

# Attendee Information

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## Conference Access

All attendees must register for WSSFC. Only paid registrants will be able to access the virtual platform including but not limited to CLE sessions, social events, chat functions, and the Legal Expo.

## Cancellations

Registration cancellations received by 12:00 p.m. CT on October 28, 2020 will receive a full refund of the registration fee. Cancellation requests made after 12:00 p.m. CT on October 28 will be subject to a \$50 late fee.

## Course Materials

Registrants can download course materials before the conference from myStateBar. Materials will also be available within the virtual conference platform.

## 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 will be submitted to the Wisconsin Board of Bar Examiners for up to 15.5 credits, including 13.0 CLE, 9.5 EPR, 6.0 LPM, and 3.0 LAU credits.\*

\*Effective July 1, 2017, lawyers can earn up to 6.0 hours of Law Practice Management (LPM) and up to 6.0 Lawyer Awareness and Understanding (LAU) credits toward the 30 hours of approved CLE required during a reporting period. See SCR 31.02 (3) and (4) for more information.

## Earn even more credits after the Conference!

Worried about missing a breakout session? Select sessions of the Conference will be recorded and available for webcast at a later date. All paid attendees can watch the first two dates of each replay for free! That's up to 7.5 additional credits!

## WSSFC 2020 Planning Committee

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

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**EARLY REGISTRATION DISCOUNT REGISTER BY OCT. 9**

CONFERENCE TUITION	EARLY	STANDARD	
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**Notice to All Registrants, Instructors, Exhibitors, and Guests**  
 By attending this event, you understand and agree that you may be photographed and/or electronically recorded during the event. Furthermore, you hereby grant the State Bar the right to use and distribute your name and likeness for promotional or educational purposes without monetary compensation. The State Bar assumes no liability for such use.

## 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)



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