

CONFERENCE GUIDE

WSSFC21

WISCONSIN SOLO & SMALL
FIRM CONFERENCE 2021

October 28-30, 2021



Win Great Prizes!

Conference attendees have various ways to win over \$2500 in prizes including:

- An Apple Watch
- Nespresso Espresso Coffee Maker
- Apple AirPods
- Fitbit Versa Smartwatch
- High-speed Dual Travel Charger
- 2022 Annual Meeting & Conference Registration
- Gift Certificates for PINNACLE® Seminars and Books

Check the Resource Center for a list of easy (and fun!) ways to win these prizes! Plus, attendees have a chance to win over \$1000 in prizes given away by our generous sponsors and exhibitors. Visit their individual booths for details!



Welcome to 2021 Wisconsin Solo and Small Firm Conference!

TABLE OF CONTENTS

How to Access the Conference	3
Make the Most of your Experience	3
Prizes and Prize Rules	4
System Requirements and Tips and Tricks	5
Important Information about CLE Credits	5
Social Events	6
Wednesday & Thursday Schedule	7
Friday & Saturday Schedule	8
Thursday Program Descriptions	10
Friday Program Descriptions	14
Saturday program Descriptions	18
Sponsors & Exhibitors	22
Exhibitor Listing	23

A Special Thank You

Thank you to the **Wisconsin Law Foundation**, **Solo and Small Firm General Practice Section**, **Diversity and Inclusion Oversight Committee**, and **Senior Lawyers Division**, for generously providing scholarships to the 2021 Wisconsin Solo & Small Firm Conference.

WSSFC 2021 PLANNING COMMITTEE

EXECUTIVE COMMITTEE

Kate Knowlton
Conference Chair

Brent J. Hoeft
Chair-Elect

Nancy L. Trueblood
Past Chair

Megan Meyer
PINNACLE CLE Program Planner

Barbara Moddes
PINNACLE CLE Program Planner

PLENARY COMMITTEE

Kathleen A. Brost
Johanna R. Kirk
Jeffrey S. Krause
Christopher Shattuck
Nancy L. Trueblood

SUBSTANTIVE LAW TRACK

Kate Knowlton
Melissa A. Spindler

PRACTICE MANAGEMENT TRACK

J. David Krekeler
Erin R. Ogden

TECHNOLOGY TRACK

Brent J. Hoeft
Nerino J. Petro, Jr.

QUALITY OF LIFE/ETHICS TRACK

Paul F. Angel
Sarah L. Ruffi



How to Access the Conference

Starting on October 28, you can access the Conference by logging into myStateBar and clicking on the WSSFC link in your [myMedia](#) tab.

Then, use the email address you registered with to gain access to CLE sessions, exhibitors, and more! It's that simple. **In order to receive CLE credit, you must click on the WSSFC link in your myMedia each day.**

Once logged in, don't forget to update your profile with your photo and your LinkedIn address so that your peers can connect with you.

How to Make the Most of your Conference Experience

Log in to the WSSFC Conference every day

You'll find everything you need just by going to wisbar.org and logging into myStateBar. It's the equivalent of stopping by registration to sign in for CLE credit and it's how you'll access the conference platform each day.

Next, update your profile

Your profile is your virtual name tag! Make it easy for other attendees to recognize you by uploading a photo. You can also link directly to your LinkedIn profile to make even more connections.

Grab your course materials

Materials will be in the "myMedia" tab of myStateBar and each session you attend will have a link to the corresponding materials.

Check out the Expo Hall

Thursday: 10/28, 8:00 a.m. to 3:00 p.m.

Friday: 10/29, 8:00 a.m. to 2:30 p.m.

Exhibitors will be available to help you address all your practice needs via social media, email, or the built-in chat forums in the virtual Expo Hall. Plus, by visiting exhibitor booths, you'll earn points and have the chance to win prizes!

Connect and chat with others!

Create a team of fellow practitioners you can turn to for guidance. Chat features on the virtual platform include public and private chat as well as one to one video chat. Get to know new people and reconnect with old friends throughout your conference experience.

Check out our Networking Lounge

Stop by our cozy Networking Lounge for even more ways to build and strengthen your connections. Just click and start chatting. It's that easy!

Join us for WSSFC 2022! | October 27 -29, 2022 | Kalahari Resort, Wisconsin Dells



Visit our Exhibitors for a chance to win valuable prizes!

All registered WSSFC2021 attendees are eligible for a chance to win prizes!

Swipe your badge in all exhibitor booths between 8:00 a.m. Thursday, October 28 until 3:25 p.m. on Friday, October 29 for a chance to win prizes such as an Apple Watch, Nepresso Espresso Coffee Maker, Apple AirPods, Fitbit Versa Smartwatch, High-speed Dual Travel Charger, and other State Bar certificates including a 2022 Annual Meeting & Conference registration and Gift Certificates to PINNACLE Seminars and Books. Winners will be randomly drawn from all completed entries.

Attendees can also score points on the Leaderboard throughout the conference for a chance to win prizes! The top Leaderboard winner will receive a \$200 Amazon Gift Card and second place will receive a \$100 Amazon Gift card. Earn points the following ways:

- Earn 5 Points for the first time you Enter the CLE Session Room
- Earn 10 Points for Clicking on Swipe Your Badge at Each Exhibitor Booth
- Earn 10 Points for Visiting Each Exhibitor Booth
- Earn 5 Points for adding any Exhibitor Materials to your Briefcase
- Earn 20 points Each Time You Chat with a Booth Rep
- Earn 10 Points by Visiting the Packer Party on Thursday Night

- Earn 5 Points for Downloading Materials from exhibitor Booths
- Earn 5 Points for Visiting the Social Lounge
- When you see the Facebook, Twitter or LinkedIn Icons, click to connect to Earn 5 Points

And don't forget! Individual exhibitors will be having contests too!

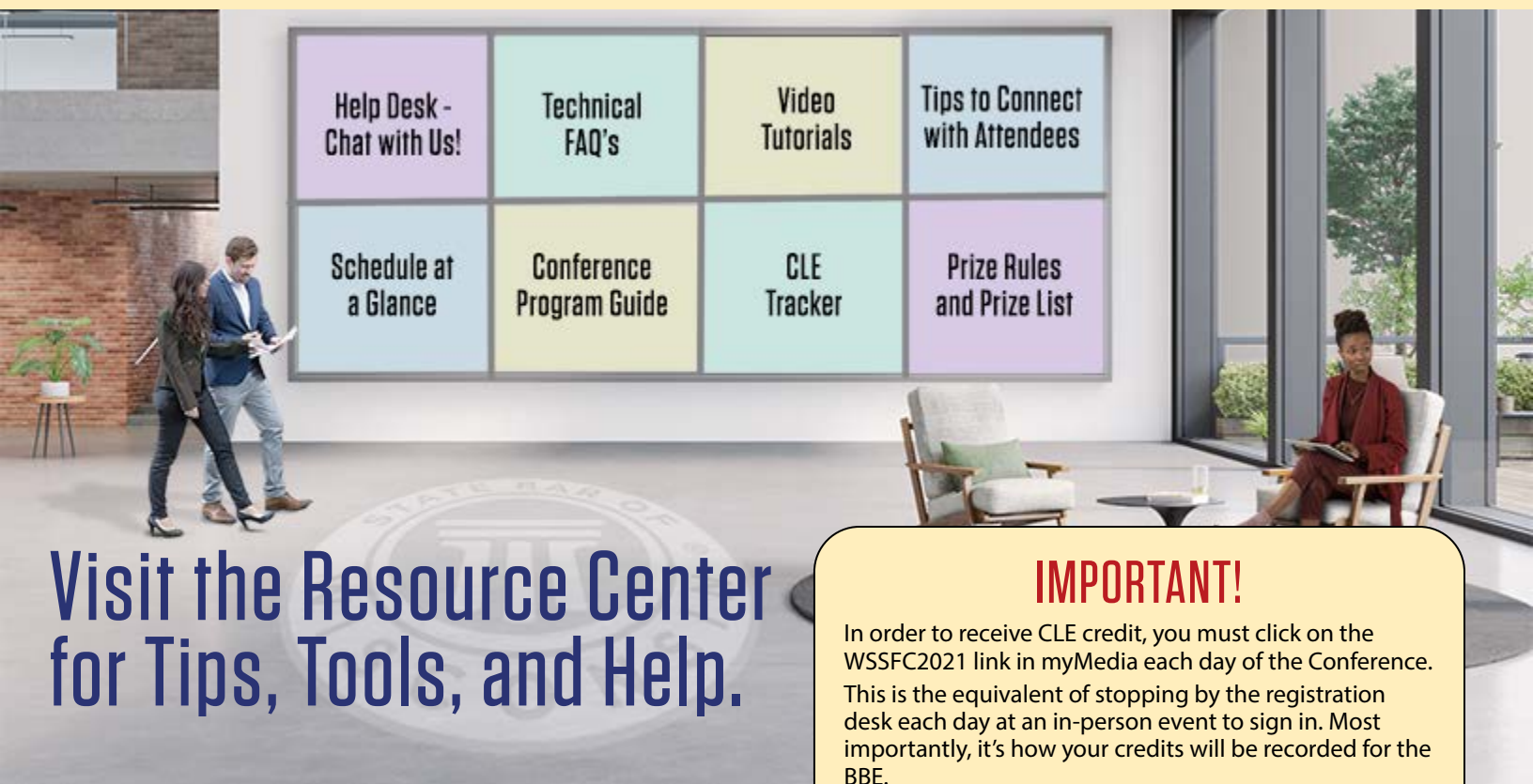
Please note: All registered attendees are eligible for a chance to win prizes. The Leaderboard will update periodically throughout the event. Your points may not be accurately reflected at all times. By swiping your badge in individual booths, you are agreeing to provide exhibitors with your contact information, including your email. Winners will be determined the week following the conference and notified by mail or email. In the event of a tie, a winner will be randomly drawn. Prizes will be shipped from the State Bar. The State Bar reserves the right to substitute prizes of equal value if a particular prize is unavailable.

Need to find your peers?

We've made it easy to reminisce with schoolmates, meet new friends, or thank someone for a referral.

Use the "Attendees" tab at the bottom of your screen to see who is attending. Once you open an Attendee list:

- Click the green chat bubble to initiate a 1:1 chat
- Click the LinkedIn icon to view a public profile (if available)
- Click on an attendee's name for an expanded view and an option for email



Visit the Resource Center for Tips, Tools, and Help.

System Requirements and Tips and Tricks

We've found that these specifications work best for the virtual conference platform:

DEVICES

Laptop, computer (Mac or PC) or tablets (Android or IOS) are supported.

INTERNET BROWSER

This is a virtual, browser based experience. If you're using an older, or unsupported Operating System, Internet Browser, or version of Flash, you may experience decreased performance. We recommend Chrome or Firefox as the most stable and consistent browsers for accessing the virtual environment.

MINIMUM SYSTEM REQUIREMENTS

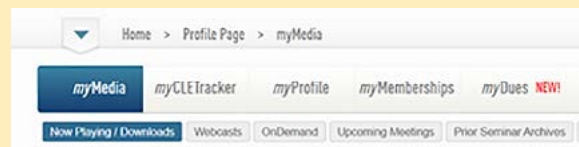
1024 x 768 screen resolution minimum

1.4 Mbps internet connection minimum

- Allow Flash
- Disable Pop UpBlockers
- Disconnect from a VPN (If possible)
- If you cannot see (or select) the bottom two options for the CLE categories, you may be using an older browser version. If you're unable to use Chrome or Firefox, try zooming your screen down to at least 80% or 90% for better navigation of the platform. To scale down your screen resolution, you can click "CTRL + - (minus key)".
- If it takes a while to log in, exit out and try again instead of waiting for the system to load.

IMPORTANT!

In order to receive CLE credit, you must click on the WSSFC2021 link in myMedia each day of the Conference. This is the equivalent of stopping by the registration desk each day at an in-person event to sign in. Most importantly, it's how your credits will be recorded for the BBE.



Starting on October 28, you can access the conference by logging in to your myStateBar account, going to myMedia, and clicking on "WSSFC2021." Then, use the email address you registered with to gain access to CLE sessions, exhibitors, and more!

Help Desk Hours

Thursday, October 28, 7:30 a.m. – 5:00 p.m.

Friday, October 29, 7:30 a.m. – 3:30 p.m.

Saturday, October 30, 7:30 a.m. – 12 p.m.

HELPFUL TIP: Open Multiple Screens

You can have multiple screens open at one time. This will enable you to continue engaging with other attendees or Expo Hall Booth Representatives while also reading information in your briefcase, listening to a speaker, or visiting other areas of the event.

To open multiple windows within the platform:

1. Once you have logged into the event and are visiting the lobby, simply copy the link address
2. Open new tab on your browser
3. Paste that link into the new tab.

NOTE: Multiple screens will not be available if you are on different devices, (i.e. Tablet and Desktop) however, it will work if you are on the same device and using the same browser.



Don't forget the fun!

WSSFC is content-heavy, but it's certainly not light on fun! There will be plenty of chances for you to engage in entertaining social activities and experience meaningful networking. Whether you're looking for some light-hearted fun after a full-day of learning or you'd like to meet colleagues who are practicing in your geographic area – we have rooms for it all!

The Great Team Scavenger Hunt

Wednesday: 10/27, 3:30 p.m. to 4:45 p.m.

We're kicking off the conference with a team scavenger hunt via Zoom. We'll play two rounds and each member of the winning team for each round will win a Starbucks gift card.

To access the scavenger hunt click [here](#).

Meeting ID: 810 5870 2245 -- Passcode: 360469

Packers Pre-game Party

Thursday: 10/28, 4:00 p.m. to 5:30 p.m.

Calling all sports fans and cheeseheads! Head to the Networking Lounge and join in the game day fun with Packers themed networking activities. You'll be able to move around freely and spark spontaneous conversations in Remo, the hosted space for the pre-game party. Fire up your webcam and join a table of based on table topics or select based on who you're looking to connect with.

Packer Pride Contest

Upload a photo of you wearing our best Packer Costume or otherwise showing your Packer Pride. The votes for uploaded photos will be tallied at 3:30 p.m. on Friday, October 29. Upload your entry on October 28 and be sure to vote for the best costume by 3:30 on Friday. Voting will take place in the Networking Lounge. The winner will receive a \$50 gift card to the Packer's Pro Shop!

Packer Pool

The first 200 attendees who registered for WSSFC2021 are automatically entered into our Packer Pool! Find your numbers in the Lounge.

How to win: A pool consists of 10 vertical columns and 10 horizontal rows, both numbered from zero to nine. Each of the first 200 registrants were randomly assigned one square. The grid with the numbers can be found in the Lounge. At the end of every quarter, the person whose square corresponds with the intersection of the second digit of each team's score wins a prize (for example, a 14–7 score at the end of the first quarter pays out the owner of the square at row 4, column 7).

For instance, imagine you have the Green Bay Packers written at the top of the board and the Cardinals on the side of the board. During the first quarter, the Packers score a 10, while the Cardinals score 15. The winner for that quarter would have a 0 on the top half of their square, representing the Packers' score. They would also have a 5 on the bottom half of their square, representing the Cardinals score. Always look at the last digits of both scores to determine a winner. We will be awarding a \$25 Amazon gift card for each quarter's winner and an additional \$50 visa gift card to the half-time winner/\$100 visa gift card to the game final score winner!

Lederer Award Presentation

Friday: 10/29, 2:10 p.m. to 2:25 p.m.

Don't miss out on one of the events of the year – the presentation of the 2021 Lederer Award, presented to an individual, group, or organization exemplifying attorney John Lederer's spirit and dedication.

Attendee networking lunch in the Lounge

Friday, 10/29, 12:10 p.m. to 1:10 p.m.

Click on the link in the lounge for access. Hosted in the networking app Remo, you'll be able to move around freely and select your crowd based on table topics or whom you'd like to connect with.

Conference Schedule

Wednesday	
3:30 - 4:45 p.m.	Networking Event: The Great Team Scavenger Hunt

Thursday	Substantive Track	Practice Management Track	Technology Track	Quality of Life/Ethics Track
8:00 a.m. - 3:00 p.m.	Legal Expo and Concierge Desk are Open			
8:30 - 10:00 a.m. 1.5 Credits	Plenary 1: If You Aren't Scared, You Should Be: Lawyers and the Dark Web (CLE)			
10:00 - 10:15 a.m.	Break – Visit the Legal Expo. Swipe your badge to win prizes!			
Breakout Session 1 10:15 - 11:30 a.m. 1.5 Credits	Adding GAL Work to Your Practice (CLE)	When Cash Is No Longer King: Structuring Fees and Taking Payments (LPM)	Client Conversion After COVID: Transforming Your Website, Social Media, and Marketing into a Client Development Machine (LPM)	Keeping Your Cool in High Conflict Cases (LAU)
11:30 a.m. - 12:30 p.m.	Lunch Break			
12:30 - 1:45 p.m. 1.5 Credits	Plenary 2: Lessons from the Pandemic: Part Deux (LPM)			
1:45 - 2:00 p.m.	Break - Visit the Legal Expo!			
Breakout Session 2 2:00 - 2:50 p.m. 1.0 Credit	GAL Appointments in Children's Court (CLE/GAL-M)	Effective Ways to Manage your Workforce Efficiency (LPM)	Get the Most Out of Your Microsoft 365 Subscription: Beyond Word and Outlook (LPM)	File Retention and Disengagement Considerations (CLE/EPR)
2:50 - 3:10 p.m.	Break – Visit the Legal Expo. Swipe your badge to win prizes!			
Breakout Session 3 3:10 - 4:00 p.m. 1.0 Credit	An Altered Workplace: COVID's Effect on Employment Compliance and Civil Liability (CLE)	Why Cultural Humility Should Be Part of Your Practice (LAU)	Barbarians Are at the Gate: Protecting Your Digital Assets (LPM)	Legal Malpractice Coverage for Lawyers in Transition (CLE/EPR)
4:00 - 5:30 p.m.	Networking Event – Packers pre-game networking event – fun and prizes!			

IMPORTANT INFORMATION ABOUT CREDITS

To get the most out of your experience, we recommend attending the live programs as much as possible/ as much as your schedule allows. While some presentations will still be accessible in the platform after the conference concludes, you won't earn credits for viewing them after October 30. In addition, plenary sessions won't be available for free replays. You'll want to catch these dynamic sessions live:

- Substantive CLE at Sunrise
- If You Aren't Scared, You Should Be: Lawyers and the Dark Web
- Lessons from the Pandemic: Part Deux
- Tax Facts to Start or Grow A Law Practice
- Gadgets, Gizmos & Widgets
- Most Common Ethics Mistakes Lawyers Make in Marketing Their Practice

Earn even more credits:

All WSSFC2021 attendees can attend the first two sets of webcast replays for free. These replays will air during the weeks of December 6 and 27, 2021. (Unlike watching a recording on the platform after the event, watching a webcast replay does come with credit attached.)

TIP: Need help keeping track of which CLE program you attended? Use the Downloadable CLE tracker found in the Resource Center.

[For more information on earning, tracking, and reporting CLE click here.](#)

Friday	Substantive Track	Practice Management Track	Technology Track	Quality of Life/Ethics Track
8:00 a.m. - 2:30 p.m.	Legal Expo and Help Desk are Open			
8:00 - 9:45 a.m. 1.5 Credits	Plenary 3: Tax Facts to Start or Grow a Law Practice (CLE)			
9:45 - 10:00 a.m.	Break			
Breakout Session 4 10:00 - 10:50 a.m. 1.0 Credit	Mergers and Acquisitions for Small Business (CLE)	Business and Practical Considerations for Law Firms in Transition (LPM)	50 Tips in 50 Minutes (LPM)	You Received an OLR Grievance – Now What? (CLE/EPR)
10:50 - 11:10 a.m.	Break			
Breakout Session 5 11:10 a.m. - 12:00 p.m. 1.0 Credit	Fair Use or Fact: How to Advise Your Clients with Regard to Trademark and Copyright (CLE)	Hiring, Firing, Retiring: Managing a Hybrid Workplace (LPM)	Cyberliability Insurance for Law Firms – What it is and Current Trends (LPM)	Ethics Update 2021: What's New, What's Old, and What Might be Coming (CLE/EPR)
12:10 - 1:10 p.m.	Informational Session – State Bar of Wisconsin Member Benefit: Competitively-priced health insurance for firms with 2+ employees (No CLE) - <i>Find this session in the Plenary Room in the Auditorium</i>			
12:10 - 1:10 p.m.	Networking Lunch – Connect with old friends and make new ones in a casual, fun setting.			
Breakout Session 6 1:10 - 2:00 p.m. 1.0 Credit	Real Estate Sign of the Times (CLE)	A Legal Research Resource Already at Your Fingertips: Fastcase (CLE)	Revisiting “Reasonable Efforts: with Remote Working Technology (CLE/EPR)	Coping With Unprecedented Circumstances (LPM)
2:00 - 2:20 p.m.	Break			
2:20 - 2:35 p.m.	Presentation of Lederer Award - <i>Happening in the Plenary Room in the Auditorium</i>			
2:35 - 3:25 p.m.	Plenary 4: Gadgets, Gizmos, and Widgets (LPM)			

Saturday	Substantive Track	Practice Management Track	Technology Track	Quality of Life/Ethics Track
8:00 - 9:00 a.m. 1.0 Credit	Plenary 5: Substantive CLE at Sunrise (CLE)			
9:00 - 9:15 a.m.	Break			
Breakout Session 7 9:15 - 10:05 a.m. 1.0 Credit	No Will but Still a Way: Estate Planning with Nonprobate Transfers (CLE)	Your Firm Has IP. What Are You Doing with It? (LPM)	Upping Your Remote Office Game: Prepping Your Firm to Be Flexible (LPM)	Harmony Is Possible: How to Successfully Sync Your Professional and Personal Lives (LAU)
10:05 - 10:25 a.m.	Break			
Breakout Session 8 10:25 - 11:15 a.m. 1.0 Credit	What Non-Bankruptcy Lawyers Need to Know About Bankruptcy (CLE)	Business Plans – A Practical Perspective (LPM)	The Power of PDFs (LPM)	How to Advise Clients and Manage Judicial Holds and Discovery with Social Media (CLE/EPR)
11:15 - 11:30 a.m.	Break			
11:30 a.m. - 12:45 p.m. 1.5 Credits	Plenary 6: Most Common Ethics Mistakes Lawyers Make in Marketing Their Practice (CLE/EPR)			

SIGN IN FOR CLE CREDITS!

Please be sure to login to wisbar.org and go to myMedia **each day** to ensure your credits are accurately recorded for the BBE.

Earn more credits

All conference attendees can earn up to **16.5 credits** during the live conference and up to an additional **24 credits** via webcast replays the weeks of December 6 and 27. All registered attendees can watch select replays for free!

35 YEARS AND COUNTING

Wisconsin Lawyers Mutual

INSURANCE COMPANY



...on a company that
listens to its policyholders.

...on support for Wisconsin
lawyers from start-up
through retirement.

**Madison WI
800.373.3839
WILMIC.COM**

**Professional liability coverage
for Wisconsin lawyers since 1986.**

THURSDAY, OCTOBER 28

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

Opening Plenary

If You Aren't Scared, You Should Be: Lawyers and the Dark Web

In today's world, data protection simply isn't an option. You also must be aware that in the unfortunate event that your law firm is hacked and your data is held for ransom, your response could have criminal consequences – even if you're just buying back your data!

In this extremely timely session, you'll learn:

- Why setting up robust data security shouldn't be put off
- How commercial transactions with bad actors could make you a co-conspirator under federal law
- What you can do now to protect your firm's sensitive information

Moderator: Nerino J. Petro, Jr., The Erickson Group, Rockford, IL; Michael J. Eichacker, IT Manager, Ruder Ware, L.L.S.C., Wausau; Agent Byron Franz, Federal Bureau of Investigation, Milwaukee; Jeff Lantz, Esquire Interactive LLC, Tucson, AZ

10:15 - 11:30 a.m.

Substantive Law

Adding GAL Work to Your Practice

One way to expand your practice and meet legal needs in the community is to accept GAL appointments. This session will provide a primer on how to incorporate GAL work into your practice.

You'll learn:

- How to meet Wisconsin's statutory requirements to accept appointments
- What your role entails as an advocate
- How the process works from appointment through payment

Moderator: Gretchen G. Viney, Distinguished Clinical Professor Emerita, University of Wisconsin Law School, Madison; Karl L. Kliminski, Kliminski Law Office, Fitchburg; Blaine Patino, Patino Law Offices, Wauwatosa; Ryan Shervy, Angela Olson Law LLC, New Richmond

Practice Management

When Cash Is No Longer King: Structuring Fees and Taking Payments

Clients today want options. They're asking for alternative fee structures such as flat fees, capped fees, and subscriptions. And, they want to be able to pay via the method of their choice — cash and checks are increasingly outdated forms of payment. This session will help you continue to make money while adapting to clients' evolving preferences and changing technologies.

You'll discuss how to:

- Offer alternative billing while remaining profitable
- Accept electronic payments
- Properly retain e-payment records

Claude Ducloux, LawPay, Austin, TX; Fatimeh D. Pahlavan, Legal Intelligence To Entrepreneurs LLC, Chicago, IL; Todd W. Schluesche, Schluesche Fields, S.C., Monroe

A Member Benefit of



Are you losing potential qualified employees to offices offering health care?



Health insurance is one of the top considerations for job candidates. The State Bar of Wisconsin Association Group Health Plan is unique in that it does not require an employer contribution.

Learn more at www.insuranceformembers.com/wsb-group-health

or

contact your Professional Insurance Programs Advisor
at 800-637-4676 or info@profinsprog.com



Professional Insurance Programs

Technology

Client Conversion After COVID: Transforming Your Website, Social Media, and Marketing into a Client Development Machine

An effective online presence can mean the difference between a struggling or thriving law firm. This informative, interactive presentation will show you how to transform your firm's website and social media channels into platforms for success. You'll learn how to:

- Improve your website's conversion rates
- Achieve top web rankings on Google
- Reach potential clients and convey your brand through social media
- Use Google My Business and review platforms to generate business
- Assess whether your website is ADA compliant

Jeff Lantz, Esquire Interactive LLC, Tucson, AZ

Ethics/Quality of Life

Keeping Your Cool in High Conflict Cases

There's no other way to say it — practicing family law is stressful. This session will provide tips on how to provide the best possible representation for your clients while not stretching yourself too thin at work or at home. You'll discuss how to:

- Provide better outcomes for your clients by prioritizing your wellness
- Address secondary trauma
- Have a trauma-informed practice

Laura J. Beck, Law Firm of Conway, Olejniczak & Jerry, S.C., Green Bay; Gregg M. Herman, Loeb & Herman LLC, Milwaukee

12:30 - 1:45 p.m.

Plenary Session

Lessons from the Pandemic: Part Deux

Last fall, Wisconsin lawyers and legal practice consultants reflected on the lessons they learned in 2020. They discussed how to regain your footing if your practice was still struggling to recover from the "Great Quarantine," as well as how to position your practice to thrive in the coming months and years.

A year later, it's time to check in. This session will offer even more useful practice management and wellness tips from your peers, including practical advice on:

- Critical technologies
- Remote working (or living at work)
- Court appearances
- In-office operations changes
- Prioritizing wellness in stressful times

Lori Dorn, Stafford Rosenbaum, Madison; Jeffrey S. Krause, Affinity Consulting Group, Waterford; J. David Krekeler, Krekeler Strother, S.C., Madison; Gia Pionek, Pionek Valle Law Group LLC, Waukesha

2:00 - 2:50 p.m.

Substantive Law

GAL Appointments in Children's Court

In CHIPS or TPR proceedings, GALs have the complex task of determining what is in the best interest of the child. If you've been considering serving as a GAL for minors, this session will



Your family has always been your top priority.

Wisconsin lawyers turn to Bultman Financial Services to help them protect their families and preserve their assets.

- Life Insurance
- Long-term Care Insurance Disability Insurance
- Individual Retirement Accounts
- Health Insurance & Dental Insurance



Brookfield, WI
262.782.9949 • 800.344.7040
www.bultmanfinancial.com

Offering policies approved by the:
A Member Benefit of



offer insight, guidance, and practice tips for attorneys heading into high-stakes, often emotionally charged situations.

You'll explore:

- How proceedings work from investigation to disposition to permanency plans
- Whether expanding in this area is right for your practice

Karl L. Kliminski, Kliminski Law Office, Fitchburg

Practice Management

Effective Ways to Manage Your Workforce Efficiency

You can't change what you don't know. Tracking is key to becoming a more informed employer. By knowing utilization rates, you can identify and eliminate where inefficiencies may be lurking, and foster a more productive, profitable office.

You'll discuss how to:

- Resolve wasted time or resources
- Maintain a productive office
- Incentivize staff through compensation plans

J. David Krekeler, Krekeler Strother, S.C., Madison; Katie Labedz, Learning to Learn

Technology

Get the Most Out of Your Microsoft 365 Subscription: Beyond Word and Outlook

Microsoft 365 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. Yet, while

Microsoft 365 is one of the most commonly implemented productivity suites in a law firm, it's also one of the most underutilized tools.

In this session, you'll discover:

- How to make the most of what you already have and pay for
- Some of the lesser known (but valuable!) applications included in 365
- How to increase efficiency and offer more cost-effective representation

Jeffrey S. Krause, Affinity Consulting Group LLC, Waterford; Bryan M. Sims, Sims Law Firm, Ltd., Naperville

Ethics/Quality of Life

File Retention and Disengagement Considerations

We all have limited space, whether physical or digital. Once you close a file, how long do you need to store it before you can destroy it? This program takes a look into the statute of limitations and parameters for storing files from a malpractice standpoint. Learn how to free up more space (and save money) in the process!

You'll review best practices for:

- Keeping files
- Sharing retention policies with clients
- Disengagement letters
- Withdrawing from representation

Matthew M. Beier, Wisconsin Lawyers Mutual Insurance Company, Madison; Thomas J. Watson, Wisconsin Lawyers Mutual Insurance Company, Madison



4 plans for your financial future—from 1 trusted source.

As a member of The State Bar of Wisconsin, you have access to affordable insurance plans at competitive group rates. Help protect your and your loved ones' financial future with Term Life, Accident, Critical Illness, and Accidental Death & Dismemberment Insurance.

For more information, visit wisbar.memberenroll.com or call Bultman Financial Services at 1-800-344-7040.

A Member Benefit of



**STATE BAR
OF WISCONSIN**

Group Insurance coverages are issued by The Prudential Insurance Company of America, a Prudential Financial company, Newark, NJ.
1052754-00001-00

3:10 - 4:00 p.m.

Substantive Law

An Altered Workplace: COVID's Effect on Employment Compliance and Civil Liability

COVID-19 has dramatically altered the workplace. The way employees work continues to be a fluid situation, with some offices welcoming employees back in person and others embracing a more permanent shift to a remote workforce. In this session, you'll learn how to advise clients on a variety of employment issues, no matter what kind of hybrid model they're adopting.

You'll discuss:

- Complying with state and federal laws when employees return to in-person
- Managing remote workers
- Wage and hour compliance with a remote workforce
- COVID-19 civil liability exemption for employers
- And more!

Kevin J. Palmersheim, Palmersheim Dettmann, S.C., Middleton;
Nilesh P. Patel, Associate Director, Human Resources at American Museum of Natural History, New York City

Practice Management

Why Cultural Humility Should Be Part of Your Practice

We live in a multicultural society. That's a given. But are you aware of how different backgrounds and cultures affect assumptions, and in turn, how those assumptions can affect the outcome of your case?

This session will help you develop your ability to work with different cultures, so you can foster a more inclusive practice. After attending, you'll be better prepared to:

- Identify how your approach can impact client relationships
- Expand your client base
- Maintain better relationships with clients

Annette Miller, EQT by Design, Madison; Odalo J. Ohiku, Law Office of Odalo J. Ohiku, Milwaukee; Michael Seung-Hyock Yang, MY Law Office LLC, Madison

Technology

Barbarians Are at the Gate: Protecting Your Digital A\$\$ets

Each year, ransomware and other cybersecurity incidents increase — both in sheer volume and in costs to remedy the incident. Lawyers need to know what is necessary to protect their data and to comply with ethics rules regarding client data. In this timely session, you'll discuss:

- Why you need 3 layers of security: Software, Hardware, & Education/Training/Policy
- Firewalls with Unified Threat Management (UTM)
- AI-based security
- Two-factor authentication, encryption, anti-virus and anti-malware, and more
- How to create a culture of security in your firm

Michael J. Eichacker, IT Manager, Ruder Ware, L.L.S.C., Wausau;
James Pearson, The Computer Center, Janesville



IF YOU OR SOMEONE YOU KNOW HAS A DISABILITY, WISPACT IS HERE TO HELP PROVIDE MORE OPPORTUNITIES FOR A BETTER LIFE.

Our Special Needs Trusts help preserve the assets of people with disabilities without endangering their eligibility for public benefits.

LIVING BEYOND LIMITATIONS



Madison, WI
(608) 268-6006
wispact.org

Ethics/Quality of Life

Legal Malpractice Coverage for Lawyers in Transition

Attorneys frequently change jobs and career paths multiple times after graduating from law school. This program will help lawyers understand and protect against any potential uncovered legal malpractice exposure when making a transition in their practice. Whether you're changing careers, switching firms, hiring or firing an employee, or retiring from the practice of law, you'll come away with a better understanding of:

- Risks of potential ethics violations
- Insurance coverage options
- How to smoothly transition without interruption

Dean R. Dietrich, Weld Riley, S.C., Wausau; Joe McCarthy, Wisconsin Lawyers Mutual Insurance Company, Madison; Aiden Sharp, Emerald Valley Law LLC, Hudson

FRIDAY, OCTOBER 29

8:00 - 9:45 a.m.

Plenary Session

Tax Facts to Start or Grow a Law Practice

While you don't need an accounting degree to hang out your shingle as a small firm attorney, you do need to understand how your decisions affect the tax requirements for everything from your business structure to hiring employees and buying real estate. Save time and money before consulting a tax pro by learning the basics of tax law yourself.

In this session, you'll discover common-but-overlooked business deductions and credits, tips on PPP funds/SBA loans, and what the law says about:

- Gross versus taxable income
- Deductions versus credits
- Mandatory filings and payments
- Work-at-home employees
- Post-COVID tax changes

Joseph W. Boucher, Neider & Boucher S.C., Madison; Eric W. Klemm, Neider & Boucher, S.C., Madison

10:00- 10:50 a.m.

Substantive Law

Mergers and Acquisitions for Small Business

2020 was a roller coaster year for businesses, and in the aftermath, conditions may be ripe for merger and acquisition activity. This session will discuss:

- Advising clients in considerations
- Enhancing the desirability of a business for acquisition
- Programs and incentives for buying and/or combining complementary businesses

Amy M. Salberg, Salberg Tuffnell Law, S.C., West Bend

Practice Management

Business and Practical Considerations for Law Firms in Transition

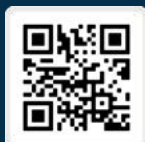
Is your business centered on specific people? Do you really need more than one office space? This session will help you assess what your business needs to be able to withstand transitions without chaos ensuing. Whether your business transitions

Success starts with the right tools.

Why not start with the most widely-used
legal case management software in the world?

Members of the The State Bar of Wisconsin are eligible to receive a 10% discount on Clio products.

Visit clio.com/wsbar to claim your discount.



SCAN ME

A Member Benefit of



STATE BAR
OF WISCONSIN



through succession, merger, or separation, you'll be prepared for a smoother process after discussing:

- Building a sustainable business
- The logistics of transitions — what to expect along the way
- How to best implement changes
- How to identify inefficiencies

Matthew M. Beier, Wisconsin Lawyers Mutual Insurance Company, Madison; Collin Schaefer, Ogden Glazer + Schaefer LLC, Cedarburg; Thomas R. Schumacher, Bakke Norman, S.C., New Richmond

Technology

50 Tips in 50 Minutes

A WSSFC favorite and back by popular demand, this highly energetic session is sure to have useful tips and tricks for everyone. Attorneys, legal administrators, and paralegals will all benefit from discovering tidbits about software, hardware, social media, productivity, security, cloud computing, mobile devices, apps, and more!

Jeff Lantz, Esquire Interactive LLC, Tucson; Nerino J. Petro, Jr., The Erickson Group, Rockford; Christopher C. Shattuck, State Bar of Wisconsin, Madison; Bryan M. Sims, Sims Law Firm, Ltd., Naperville

Ethics/Quality of Life

You Received an OLR Grievance — Now What?

You just found out a grievance has been filed against you. Now what? This session will demystify how the lawyer regulatory system works and help you avoid common missteps that lead to OLR grievances or malpractice claims in the first place.

You'll learn:

- Dos and don'ts for responding to an OLR grievance complaint
- How the OLR process works from intake through disposition
- Tips for improving client communications

Stacie H. Rosenzweig, Halling & Cayo, S.C., Milwaukee

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

Substantive Law

Fair Use or Fact: How to Advise Your Clients with Regard to Trademark and Copyright

Emails, newsletters, websites, social media...marketing these days can take so many forms. Whether you're advising business clients or you're working on your own marketing campaigns, you need to know when it's okay to use information created by others. From using stock photographs to sharing posts created by others, this session will inform you when — and how — content created by others can be used in marketing.

Erin R. Ogden, Ogden, Glazer + Schaefer LLC, Madison; Melissa Spindler, Smith Keane LLP, Hartland

Practice Management

Hiring, Firing, Retiring: Managing a Hybrid Workplace

Onboarding. Training. Terminating. What are the best ways to handle these processes when you're not in the same physical room as your employees? In light of the learning curve provided by 2020, this session will discuss new (and not so new) considerations for managing staff, so your practice doesn't miss a beat even during unforeseen circumstances.



MINNESOTA LAWYERS MUTUAL
INSURANCE COMPANY



**Lawyers' professional liability insurance is all we do.
As a result of doing one thing, we do that one thing well.**

At MLM "here today, here tomorrow" is more than just a motto and our financial strength is your best defense.

Visit MLM's Interactive Booth.
Take our 'What's Your Malpractice IQ?' quiz and enter a drawing to win a \$50 gift card!



Get a no-obligation quote today!

Chris Siebenaler, Esq.
612-373-9641
csiebena@mlmins.com
www.mlmins.com

Protecting Your Practice is Our Policy.®

You'll discuss:

- Best practices for acquiring, managing, and letting go of staff members
- Supplying remote workers with necessary office equipment
- Retaining ownership of office property in the event of termination
- Delegating tasks and ensuring things are done well (and safely)

Jane D. Clark, Lake Effect HR & Law LLC, Madison; Tricia Perkins SPHR, SHRM-SP, Lake Effect HR & Law LLC, Madison

Technology

Cyberliability Insurance for Law Firms – What it is and Current Trends

The question isn't if your firm will suffer a cybersecurity incident — it's when. With data breaches and cybercrimes increasing each year, it's more important than ever to have plans in place to protect your clients' most sensitive information and the reputation of your firm – not to mention to prevent overwhelming financial losses.

Cybersecurity policies can vary greatly. From cyberattack prevention to incident remediation and response, this session will inform you:

- What you need to insure against incidents
- What to look for when reviewing policies
- What to expect from your cybersecurity policy

Moderator: Thomas J. Watson, Wisconsin Lawyers Mutual Insurance Company, Madison; Matthew M. Beier, Wisconsin Lawyers Mutual Insurance Company, Madison; Katharine H. Campbell, Godfrey & Kahn, S.C., Milwaukee

Ethics/Quality of Life

Ethics Update 2021: What's New, What's Old, and What Might be Coming

Who said learning ethics can't be fun? In this high-energy session modeled after a classic game show with a twist, you'll hear details from real ethics cases. Test your knowledge to see if you know what happened, score some points, and most importantly, learn how to stay out of ethics jeopardy in your own law practice.

Michele L. Perreault, DeWitt LLP, Madison

1:10 - 2:00 p.m.

Substantive Law

Real Estate Sign of the Times

The COVID-19 pandemic created many challenges and opportunities in the housing market. Amidst a sea of change, this session will help you make sense of emerging conditions in real estate buying and selling.

You'll receive an extensive update on the status of evictions, as well as discuss the housing markets in Wisconsin and implications for your practice in regards to:

- Low interest rates
- Shrinking residential inventories
- Changing commercial needs
- Economic uncertainty
- Government programs to help businesses and consumers

Jessica M. Kramer, Kramer, Elkins & Watt LLC, Madison; Cori M. Lamont, Wisconsin Realtors Association, Madison

Practice Management

A Legal Research Resource Already at Your Fingertips: Fastcase

Fastcase is a comprehensive 50-state and federal case law database that rivals the biggest legal research companies. Best of all, State Bar of Wisconsin members have unlimited access to this online research service at no extra cost — it's included with membership. In January 2021, Fastcase acquired CaseMaker and has been quickly adding even more features and capabilities.

In this session, you'll learn:



We can help you protect it with a Home and Highway® policy from West Bend.

One policy, one bill, one deductible, one agency and a discount for members of the
State Bar of Wisconsin.

To find out what else the Home and Highway has to offer, contact this Official Supplier of the Silver Lining.

Professional Insurance Programs
at (414) 277-0154 or info@profinsprog.com

Or to find an agency near you, visit thesilverlining.com.



- How to access Fastcase
- Features you should know about
- How this free member benefit can make your legal research easier

Nina Steinbrecker-Jack, Fastcase, Washington, D.C.

Technology

Revisiting “Reasonable Efforts” with Remote Working Technology

Issued January 29, 2021, new Wisconsin Ethics Opinion EF-21-02 provides updated guidance on what constitutes “reasonable efforts” in connection with remote working technology. It’s critical that attorneys working remotely understand what constitutes an ethical use of technology in order to comply with ethics rules and adequately protect clients’ sensitive information.

In this session, you’ll go into detail on:

- New ethics opinion, EF-21-02
- The current state of ethics guidance
- Technology and the ethics of working remotely

Brent J. Hoeft, FirmLock Consulting LLC, Madison; Aviva Meridian Kaiser, Ethics Counsel, State Bar of Wisconsin

Ethics/Quality of Life

Coping with Unprecedented Circumstances

Over the course of the pandemic, WisLAP has seen an uptick in calls. The past year has been challenging on multiple fronts, and understandably, many people are struggling with mental health and addiction issues. If you’re also having a hard time — or have noticed someone in your life who could benefit from talking to

someone — WisLAP has ways to help.

You aren’t alone — nor do you have to be “in crisis” to benefit from this session. Attend to discover:

- How to recognize signs of unhealthy coping habits in yourself or in others
- WisLAP resources available to you as part of your State Bar of Wisconsin membership
- Practical suggestions for reducing your stress load right now

Jason Magill, State Bar of Wisconsin WisLAP Coordinator

2:35 - 3:25 p.m.

Plenary Session

Gadgets, Gizmos, and Widgets

A true WSSFC tradition, this fun, high-energy session is back and more beneficial than ever. Presenters 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 de-stress 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

Jeff Lantz, Esquire Interactive LLC, Tucson, AZ; Nerino Petro, The Erickson Group, Rockford; Bryan Sims, Sims Law Firm Ltd., Naperville



Thanks to a generous pledge from the Kevin & Roseann Lyons Fund with the Greater Milwaukee Foundation, all donations from individuals who have not contributed to the Wisconsin Law Foundation since July 1, 2018, will be matched for a cumulative dollar total of up to \$25,000!

You read that right.

If you haven’t donated to the Foundation since July 1, 2018, ALL donations you give now through June 30, 2022, will have TWICE the impact thanks to the Lyon’s fund matching grant.

Given this matching grant, now would be the perfect opportunity to get involved with the Foundation and to make an even bigger difference with your generous donation!

Visit the Double Your Impact page at www.wisbar.org/wlfdouble for more information!

SATURDAY, OCTOBER 30

8:00 - 9:00 a.m.

Plenary Session

Substantive CLE at Sunrise

Whether you have a specific or general law practice, you need to be familiar with a range of substantive law issues — and know when it's necessary to refer out clients with needs that fall outside of your practice area. Thanks to this fast-paced, rapid-fire primer, you'll leave with enough information to help you confidently field the inevitable, "Hey, you're a lawyer, right?"

In this panel session, presenters will cover some of the most popular hot topics and share what you should know about:

- Legal ways to act for others
- Nursing home neglect cases
- Wisconsin's Lemon Law
- Construction liens
- Landlord-tenant law and evictions

Kathleen A. Brost, Legacy Private Trust Co., Neenah; Jonathan P. Groth, Groth Law Firm Accident Injury Attorneys, Brookfield; Teresa K. Kobelt, Bartelt Grob, S.C., Middleton; James L. Robinson, Jr., Attorney at Law, Milwaukee; Amy Salberg, Salberg Tuffnell Law, S.C.

9:15 - 10:05 a.m.

Substantive Law

No Will but Still a Way: Estate Planning with Nonprobate Transfers

Wisconsin continues to expand the ability of clients to distribute their assets upon their death using joint account status or

beneficiary designations on bank accounts, life insurance, retirement accounts, and even on real estate.

As more and more assets are transferred outside probate and a will, this session will address:

- How to accomplish estate planning with nonprobate transfers
- The positives and negatives of nonprobate transfers
- How to transfer assets like LLCs or stock interests.

Alexander L. Ullenberg, Ullenberg Law Offices, S.C., Fond du Lac; Michael D. Kaiser, Kaiser Holahan LLC, Hartland

Practice Management

Your Firm Has IP. What Are You Doing with It?

Innovation is very much alive and well, especially during the global pandemic. While you talk to your clients about protecting their intellectual property, have you given much thought to your own intellectual property?

In this session, you'll discuss how to:

- Identify your firm's intellectual property
- Protect your trademarks, copyrights, and trade secrets
- Know when protections need to be updated due to changing technologies

Garet K. Galster, Smith Keane LLP, Hartland; Erin R. Ogden, Ogden, Glazer + Schaefer LLC, Madison

One Fee. Unlimited CLE.

With the PINNACLE Ultimate Pass, it's easier and more convenient than ever to keep up with CLE requirements.

Did you know we also offer a payment plan?

Give your budget a break with our easy payment plan available for Ultimate Pass and the Books UnBound® library. Three simple payments is all it takes.

Visit **WisBar.org/paymentplan** for details.

Call (800) 728-7788 or visit **wisbar.org/ultimatepass** for more information and to purchase your Ultimate Pass today!



Technology

Upping Your Remote Office Game: Prepping Your Firm to be Flexible

The pandemic forced law firms to examine their ability to provide quality legal services no matter where attorneys are working. Firms that had already implemented remote working tools and cloud-based applications prior to 2020 had an easier transition to make.

But, if you felt like you were caught off guard or are still struggling to understand the multitude of technologies on the market, then this session is for you. You'll discuss the array of private and secure communication tools that are available for a remote law office, including:

- Messaging
- Video and teleconferencing
- VPN
- RDP
- Encryption
- Cloud backups
- Client portals
- Web-based practice management software

Brent J. Hoeft, Firmlock Consulting LLC, Madison; Christopher Shattuck, Law Practice Assistance Manager, State Bar of Wisconsin, Madison

Ethics/Quality of Life

Harmony Is Possible: How to Successfully Sync Your Professional and Personal Lives

"Work-life balance" may be a popular catchphrase, but it can be an impossible standard to maintain. By shifting your perspective from "balance" to "harmony," your practice can change dramatically and you can enjoy life more. Discover how your professional life and personal life can exist harmoniously by learning:

- The power of mindful breathing
- How to change your view on the "practice" of law
- The importance of professional boundaries

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

10:25 - 11:15 a.m.

Substantive Law

What Non-Bankruptcy Lawyers Need to Know About Bankruptcy

With the moratorium on evictions, foreclosure sales, and suspension of student loan payments ending soon, a "pandemic" of bankruptcy filings could still happen. The implications of bankruptcy filings can be far-reaching to creditors, debtors, and even seemingly uninvolved parties. This session will cover how to advise clients who may need bankruptcy protection, including:

- When to recommend they consult with a bankruptcy attorney



STATE BAR OF WISCONSIN
PINNACLE



PLEASE STAND BY

There's no need to wait when you have CLE OnDemand™.

Earn valuable CLE credits whenever and wherever it's most convenient for you. Watch, pause, rewind, and replay information-packed State Bar of Wisconsin PINNACLE® seminars from anywhere you have an internet connection.

Anytime. Anywhere. CLE OnDemand.
www.wisbar.org/ondemand

I AM ALWAYS RECOMMENDING SMITH.AI

TO OTHER FIRMS, BUSINESSES, AND MY OWN CLIENTS.

JOEY VITALE
FOUNDING ATTORNEY, INDIE LAW



OUR NORTH AMERICA-BASED AGENTS DO MUCH MORE THAN CALL ANSWERING!

- 24/7/365 BILINGUAL ANSWERING
- SCREENING, SCHEDULING & INTAKE
- CALLS, CHATS, SMS & FACEBOOK
- FREE SPAM CALL BLOCKING
- 1000S OF INTEGRATIONS
- INBOUND & OUTBOUND



...AND MANY MORE!



smith.ai | (650) 727-6484 | hello@smith.ai

FROM \$210/MONTH
USE CODE WISBAR100
FOR \$100 OFF

- What they should do – and NOT do – to prepare for a bankruptcy filing
- What to do if they receive notice that a customer or vendor has filed bankruptcy

Plus, since any attorney's practice could be affected by the rise in bankruptcies, you'll review how to get paid for non-bankruptcy work when clients become involved in a bankruptcy and how to keep what you're paid.

Eliza M. Reyes, Steinhilber Swanson LLP, Madison; Eric A. Ristau, Laffey Sebranek Auby & Ristau, S.C., Sun Prairie; Jennifer M. Schank, Fuhrman & Dodge, S.C., Middleton

Practice Management

Business Plans – A Practical Perspective

Whether you use Business Model Canvas or another tool, it's important to put a business plan in place. Efficient businesses create plans, implement them, and most importantly, adjust the plans when circumstances change (Hello, COVID!).

This session will discuss how to accomplish all three stages — creation, implementation, and adjustment — so no matter what your business is facing, it's poised to succeed.

Jeffrey M. Glazer, Ogden, Glazer + Schaefer LLC, Madison; Christopher C. Shattuck, Law Practice Assistance Manager, State Bar of Wisconsin, Madison

Referrals are an important part of our practice.



HABUSH HABUSH & ROTTIER S.C.®

When it comes to personal injury cases, we are committed to working together. With 13 offices located throughout the state, we are here for you.

HABUSH.COM | 800-242-2874

We can help with all referrals and are willing to cover all costs.

Appleton | Green Bay | Kenosha | Lake Geneva | Madison | Milwaukee | Racine | Rhinelander | Sheboygan | Stevens Point | Wausau | West Bend

REACH WISCONSIN'S LEGAL COMMUNITY, GROW YOUR BUSINESS

The State Bar of Wisconsin has NEW targeted monthly and quarterly opportunities to reach Wisconsin's legal community through a variety of marketing channels, in addition to the following:

- Wisconsin Lawyer™ magazine display and classified advertising
- Digital advertising through WisBar website, InsideTrack, CaseLaw Express, or WisLawNOW
- Sponsorships
- Legal expos
- Mailing lists

Contact Crystal to learn how these business development opportunities will build your reputation, increase awareness of your practice, generate business, and grow revenue!



Crystal Brabender

Advertising Sales Manager
(800) 444-9404, ext. 6132
(608) 250-6132
cbrabender@wisbar.org



STATE BAR
OF WISCONSIN

Technology

The Power of PDFs

PDFs are one of the two main document types used to generate and share electronic documents on a daily basis. But are you taking full advantage of PDF software? Elevate your law firm and bring it closer to a paperless office by knowing the power of today's PDF software — from Adobe Acrobat to other hot alternatives.

This session will help you become more PDF-literate by sharing what tools you should be using now and what you need to know in regards to:

- Document sharing
- Security
- Scanning
- Fillable forms
- And more!

Bryan M. Sims, Sims Law Firm, Ltd.,

Ethics/Quality of Life

How to Advise Clients and Manage Judicial Holds and Discovery with Social Media

This session outlines how to properly advise your clients about the risks and liabilities when they use social media networks. We will also discuss using social media as evidence and understanding judicial holds. Based on recent ethics opinions, lawyers are required to understand the basics of how social media platforms function. In reality, if you want to effectively advise your clients on the impact of their behavior, you need

to have a clear understanding of how social media platforms work. Also, if you are going to trial, you may need to be able to communicate about various social platforms.

After this session, you will be able to guide your clients more effectively, communicate clearly regarding issues surrounding publishing on social networks and know which possible areas should be avoided for ethical reasons. From the client to the courtroom, this course covers it all.

Jamie Kohls, GNGF, a marketing firm for lawyers, Cincinnati, OH

11:30 a.m. - 12:45 p.m.

Closing Plenary

Most Common Ethics Mistakes Lawyers Make in Marketing Their Practice

What does it take to establish a successful online marketing presence without coming under the watchful eye of the OLR? This session will show you how to boost your firm's online prowess without violating Wisconsin's Rules of Professional Conduct.

You'll learn how to use tools like Google, AVVO, social media, plus discuss what needs to be considered when setting up:

- Websites
- Reviews and solicitations
- Online directory listings
- Social media and blog posts

Mark Homer, CEO of GNGF, a marketing firm for lawyers, Cincinnati, OH



Exclusive Offer for Wisconsin Solo & Small Firm Conference Attendees


Sign up for LawPay by
Nov. 30 and pay no monthly
program fee for 9 months

OPEN AN ACCOUNT



STATE BAR
OF WISCONSIN

PROUD MEMBER
BENEFIT PROVIDER



Wisconsin Chapter

A Chapter of the Association of Legal Administrators

Please join WALA at the State Bar of
Wisconsin Annual Meeting & Conference
June 16-17, 2022
Grand Geneva Resort
Lake Geneva, Wisconsin

Improving the quality of management in legal service
organizations since 1978 through education,
networking, and community outreach.

www.wi-ala.org

Thank you to our Conference Supporters & Exhibitors

PLATINUM LEVEL



GOLD LEVEL



SILVER LEVEL



ADDITIONAL SPONSORS



Bultman Financial GOLD Sponsor 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.

Civille getciville.com

Civille exists to make an easier connection between the people that need help and the law firms who can help. From law firm websites to digital marketing to analytics to lead management – we offer a full solution to bring more qualified leads – and do more with those leads.

Clio GOLD Sponsor www.clio.com

Clio is the world's leading cloud-based legal software platform that prides itself in simplifying operations, growing businesses, and allowing legal professionals like you to work remotely from anywhere. Let Clio focus on the business side of running your firm while you spend more time doing what you do best – practicing law. Learn more at www.clio.com.

Habush, Habush & Rottier, S.C. GOLD Sponsor www.habush.com

Habush Habush & Rottier has served as Wisconsin's 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, will cover all costs, and offer work sharing, and fee arrangements.

LAWCLERK www.lawclerk.legal

LAWCLERK is where attorneys go to hire virtual associates and freelance lawyers. Solos and small firms can profit by outsourcing work to 4,300+ talented freelance lawyers. We offer Project and Subscription services to get you the exact help you need, when you need it. No sign-up or monthly fees.

LawPay www.lawpay.com

LawPay was developed specifically for legal professionals, providing a simple, secure way to accept credit, debit, and eCheck payments online. Additionally, LawPay's technology ensures compliance with ABA and IOLTA guidelines. LawPay is a proud member benefit of the State Bar of Wisconsin and trusted by more than 150,000 lawyers.

Minnesota Lawyers Mutual Insurance Company GOLD Sponsor <https://www.mlmins.com/insurance/where-we-insure/WI>

Founded by lawyers, for lawyers in 1982, Minnesota Lawyers Mutual Insurance Company (MLM) has provided risk management services for the legal community, including lawyers' professional liability insurance. MLM strives to be 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 33 years.

OurFamilyWizard ourfamilywizard.com

Working with clients on OurFamilyWizard, family law and mental health practitioners can help families move beyond conflict. The OurFamilyWizard application helps divorced or separated parents easily and effectively manage schedules, record expenses, create journal entries, share files, and accurately document communication while building toward an amicable co-parenting relationship.

Professional Insurance Programs GOLD Sponsor <https://insuranceformembers.com/home/choose-your-association/wisconsin-state-bar/>

Professional Insurance Programs is an independent agency whose focus is providing customer insurance and risk management solutions to professionals.

LAWCLERK
www.lawclerk.legal

Where Attorneys Go To Hire Virtual Associates and Freelance Lawyers

QR code linking to www.lawclerk.legal

Freelance Lawyer Interface:
A FREELANCE LAWYER IS INTERESTED IN YOUR PROJECT:
DECLINE ASSIGN
FREELANCE LAWYER
MADISON, WI
I am an expert legal writer with 5 years federal clerkship experience and have recently worked on this issue.

Your Success Starts with Us

Solo Small Firm & General Practice Section

Join us at Wisbar.org/ssfsgp

Smith.ai

<https://smith.ai/>

Smith.ai is a 24/7 virtual receptionist service that specializes in capturing and converting leads who contact you by phone, text, chat, or Facebook message. Our professional, friendly North America-based receptionists do more than answer calls and take messages — we block spam calls for free, screen and qualify potential clients, and much more. Get \$100 your first month of service using code WISBAR100.

Smith Keane LLP

www.keaneip.com

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.

Solo & Small Firm Section

Wisbar.org/SSFGP

The Solo Small Firm & General Practice Section is a community committed to providing practical and current legal education, as well as professional development, for its members. As a part of that commitment, the Section actively supports the annual Wisconsin Solo Small Firm Conference and produces or sponsors several CLE programs each year. It also provides an opportunity for section members to seek and share information via their popular Section e-list, supports monthly virtual lunchtime roundtable discussions, and publishes an Agricultural Law and Rural Practice Blog.

Spotlight Branding

<http://www.spotlightbranding.com/>

Spotlight Branding is a content marketing agency dedicated to helping solo/small firms create an educational Content Loop™ that increases referrals, attracts the right clients, and realizes a higher ROI on all of their other marketing efforts. Our services include Website Design, Blogging, E-Newsletters, Social Media, Video, and Podcast Production.

WALA

www.wi-ala.org

WALA's Mission: Improve the quality of management in legal service organizations. Promote and enhance the competence and professionalism of legal administrators and all members of the management team. Represent professional legal management and managers to the legal community and to the community at large.

West Bend Mutual Insurance Company

GOLD Sponsor

www.thesilverlining.com

West Bend Mutual Insurance Company has been insuring homes, autos, and businesses for more than 125 years. Headquartered in West Bend, Wisconsin, the company employs more than 1,300 associates and partners with 1,500 independent insurance agencies in 13 states to bring these products and services to their valued customers.

WILMIC

PLATINUM 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.

Wisconsin Law Foundation

GOLD Sponsor

Wisbar.org/WLF

The Wisconsin Law Foundation is the charitable arm of the State Bar of Wisconsin. Its mission is to promote public understanding of the law, improve the administration of justice, and increase law-related public service through funding of innovative and creative programs that improve the vision of the American justice system.

Wispect Inc.

GOLD Sponsor

www.wispect.org

Wispect Inc. is a private nonprofit organization that administers pooled and community Special Needs Trusts for people with disabilities. Wispect manages the Special Needs Trusts for more than 3,800 people throughout the state of Wisconsin.



YOUR ONLINE PRESENCE MATTERS.

Don't get stuck with the leftover clients that take up your time. Get the clients you want — whether through search or referral — by having an impressive, optimized, and trustworthy website.



Best-in-Class Modern Websites



Impactful Digital Marketing Solutions



Transparent Analytics + Reporting



Lead Enhancement Tech + Processes

FREEDOM IN TRANSPARENCY

+1 920.903.5168 | getciville.com

There are 25,520 lawyers in Wisconsin.
How will **YOU** stand out?





AT SPOTLIGHT BRANDING
WE FOCUS ON PEOPLE, NOT SEARCH ENGINES.

- Website
- Social Media
- E-Newsletter
- Blogging
- Video FAQs
- Podcast Production

SCHEDULE A CONSULTATION

800-406-7229

or Book Online

SpotlightBranding.com/schedule

www.SpotlightBranding.com

Want to Learn More About Our Strategy?
Download our Free Report Now at
SpotlightBranding.com/Anti-Seo-Report/





Appellate
Criminal
Civil Litigation
Family
Elder
Real Estate
Business
Estate Planning/
Probate

Achieve the workflow dream with our cloud-based Forms Library

Forms done right

Experience the ease and convenience of 24/7 access to 1,350+ forms in eight libraries.

Convenient

Streamline your workflow with this central, online location for legal forms available anywhere with an internet connection.

Comprehensive

Access hundreds of documents, including:

- Affidavits
- Agreements
- Authorizations
- Checklists
- Complaints
- Motions
- Notices
- Orders
- Petitions
- Sample language
- Summonses

Customizable

All documents are available in MS Word and/or fillable PDF format for easy editing and modification.

Current

Every form is regularly updated to ensure it complies with all statutory requirements.

Quick

Find the form you need fast within each library's easily searchable setup.

Check out all eight of our individual forms libraries.



Appellate
Practice



Business Law



Civil Litigation



Criminal Law



Elder Law



Estate
Planning/Probate



Family Law



Real Estate



FILLABLE FORMS BANK (all libraries)

FSFBZ000 | \$679/year

Number of forms: 1350+

Access every form, in any library, with a full Fillable Forms Bank subscription. Access 1350+ forms and legal documents in 8 libraries year-round!

Individual practice area libraries and multi-user subscriptions are also available.

Subscribe today!

Call (800) 728-7788 or visit
wisbar.org/formsbank

Fillable Forms Bank
Current. Convenient. Customizable.