



STATE BAR OF WISCONSIN  
**PINNACLE**



## Meeting you where you are

*"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

# WSSFC21

WISCONSIN SOLO & SMALL  
FIRM CONFERENCE 2021



## October 28-30, 2021

Earn up to 16.5 CLE credits with a mix of CLE,  
EPR, GAL, LAU, and LPM credit options

# We'll meet you where you are...

## In your Practice

Review 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. Earn up to 16.5 CLE credits with a mix of CLE, EPR, GAL, LAU, and LPM credit options offered.



## In Your Business

Discover how to get the most out of the tools you use every day. Build business relationships with fellow attendees. Come away with ideas for eliminating inefficiencies in your practice. Pick up another source for referrals. Learn HR and management skills from more experienced colleagues.



## In Your Life

Learn how you can live well, work smarter, and reduce stress! See how other attorneys are continuing to adapt to the challenges brought on by COVID-19. Talk with colleagues who "get it" - who can relate to the unique stressors and situations you face. Share with others what's helped you cope this past year - professionally and/or personally!



# Our virtual platform replicates a real world experience!

***"This wasn't just a bunch of links that we had to select in order to get to certain areas. The platform was easy to use, and actually quite fun."***

- WSSFC 2020 virtual attendee

If you attended the 2020 Wisconsin Solo and Small Firm Conference and/or the 2021 Annual Meeting and Conference, you'll be right at home navigating the platform for WSSFC 2021, powered by 6Connex. If you didn't, don't worry! It's intuitive and easy to use.

**The robust virtual platform gives you the ability to...**

- Join in from the location of your choice
- Focus on presentations in your own quiet space
- Save on lodging and travel costs
- Multitask!

***"This was an amazing platform and was so user friendly. The planning committee did an amazing job and all the presentations were so valuable!"***

- WSSFC 2020 virtual attendee



# Easily Connect via Tablet, Computer, or Smartphone!

You will find everything you need just by going to [wisbar.org](http://wisbar.org) and logging into [myStateBar](http://myStateBar)! It's that easy!

- Experience everything from one easy login! Every day of the Conference, to access the virtual platform and ensure you receive CLE credit, you'll log in to [myStateBar](http://myStateBar), go to [myMedia](http://myMedia), and click on "WSSFC 2021."
- Connect with presenters, attendees, and Legal Expo representatives via robust public and private chat functionalities.
- Browse the virtual Legal Expo and learn about products and services designed specifically for the legal community via videos and downloadable information.
- Swipe your electronic badge every time you visit individual virtual "booths" at the Expo and be entered for the chance to win prizes!

In addition, each attendee has a virtual briefcase filled with exhibitor collateral and conference documents to ensure the best journey possible. You can save, view, share, or download these items throughout the event.

## Technical Assistance Available at Every Click

We'll bet you'll find our online platform to be easy to navigate and intuitive, but if you need technical assistance, help is always available. You can connect with our friendly online staff via our dedicated online Help Desk, view video tutorials or written instructions about the platform that we'll share via email, or contact our Customer Service team via phone.

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## Register by October 1 and save money!

Plus, all attendees who register by October 1 will receive a swag bag of goodies from our Sponsors and Exhibitors.

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# Interacting with Attendees, Speakers, and Legal Expo Representatives is Easy...and Fun!



*"For someone who has a hard time networking, the networking options for the virtual format made it less intimidating."*

-Past attendee



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 virtual, 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 other attendees.

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

- Past Attendee

Chat functions are accessible 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.



October 28-30

## Other chat features include:

- Both public and private chat functions
- 1:1 video chat
- Multiple simultaneous 1:1 chat capabilities

Plus, the ability to:

- 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 Networking Lounge or with our virtual Legal Expo representatives via social media, email, or 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!

**Psst.... Looking for more ways to save on CLE costs?**

**Invest in an Ultimate Pass Gold!**

For one annual fee, this powerful pass gives you free access to State Bar of Wisconsin conferences, institutes, and CLE seminars. An Ultimate Pass Gold gives you free WSSFC tuition PLUS unrestricted access to complete PINNACLE® CLE offerings, including live sessions, webcast replays, web audio, and OnDemand sessions. A Gold Pass also includes free tuition to the Annual Meeting & Conference. For more information and to purchase, visit [www.wisbar.org/ultimatepass](http://www.wisbar.org/ultimatepass) or call (800) 728-7788.



# 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. Visit individual booths for the chance to win over \$2,500 worth of prizes including gift certificates for PINNACLE books and seminars, the Annual Meeting and Conference, a free Ultimate Pass, and tech gadgets for your home or office.



## Sponsors and Exhibitors

### PLATINUM LEVEL

Wisconsin Lawyers Mutual  
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### GOLD LEVEL

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# 17 Reasons why you and your staff should attend the 2021 Wisconsin Solo and Small Firm Conference:

1. Avoid missteps that can lead to OLR grievances, malpractice claims, or even trouble with the feds!
2. Find out whether expanding into GAL work is right for your practice
3. Discover how you and your legal administrators can offer clients alternative billing while still remaining profitable
4. Take advantage of a complimentary 20-minute consultation on your firm's website\* (Limited number - sign-ups TBA!)
5. Connect or re-connect with your peers who can provide guidance (and referrals!) throughout the rest of the year
6. Keep lawyering on...find out how others are continuing to adapt their practice to the challenges brought on by COVID-19 pandemic
7. Get time back for you and your staff! Discover how to identify and eliminate wasted time or resources in your office
8. Dive deep into Microsoft 365 - the suite of tools you most likely use and underutilize every day
9. Go paperless! Or at least bring your office as close to the brink of being paperless as possible by knowing the power of today's PDF software
10. Foster a more inclusive practice through learning how to work better with clients from different cultures
11. Hear what non-bankruptcy attorneys should know about bankruptcy
12. Wrap your head around the array of tools available for a remote law office - and communicate more securely with staff, colleagues, and clients
13. Shift your perspective from "work-life balance" to "harmony" and become more fulfilled at home and at work
14. Understand how to make transitions in your practice without exposing yourself to uncovered legal malpractice
15. Help your legal administrators properly retain e-payment records
16. Learn how to more effectively delegate tasks to your staff - especially if you're not in the same physical room
17. Return to your office armed with proven strategies, tactics, and techniques!

**Larger firms  
will benefit  
from these, too!**



# Conference Schedule



Substantive Law
  Practice Management
  Technology
  Ethics/Quality of Life

THURSDAY – October 28, 2021	
Time	Event
8:00 a.m. - 3:00 p.m.	Legal Expo and Concierge Desk are Open
8:30 a.m. - 10:00 a.m. 1.5 Credits	<b>Plenary 1:</b> If You Aren't Scared, You Should Be: Lawyers and the Dark Web (CLE)
10:00 a.m. - 10:15 a.m.	Break
<b>Breakout Session 1</b> 10:15 a.m. - 11:30 a.m. 1.5 Credit	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 p.m. - 1:45 p.m. 1.5 Credits	<b>Plenary 2:</b> Lessons from the Pandemic: Part Deux (LPM)
1:45 p.m. - 2:00 p.m.	Break
<b>Breakout Session 2</b> 2:00 p.m. - 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 p.m. - 3:10 p.m.	Break
<b>Breakout Session 3</b> 3:10 p.m. - 4:00 p.m. 1.0 Credit	An Altered Workplace: COVID's Effect on Employment Compliance and Civil Liability (CLE)
	Business Plans – A Practical Perspective (LPM)
	Barbarians Are at the Gate: Protecting Your Digital A\$\$ets (LPM)
	Legal Malpractice Coverage for Lawyers in Transition (CLE/EPR)
4:00 p.m. - 5:30 p.m.	Networking Event – Packers pre-game networking event – fun and prizes!
FRIDAY – October 29, 2021	
Time	Event
8:00 a.m. - 2:30 p.m.	Legal Expo is Open!
8:00 a.m. - 9:45 a.m. 1.5 Credits	<b>Plenary 3:</b> Tax Facts to Start or Grow a Law Practice (CLE)
9:45 a.m. - 10:00 a.m.	Break
<b>Breakout Session 4</b> 10:00 a.m. - 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 a.m. - 11:10 a.m.	Break

**Keep your connections to the legal market strong by sponsoring a special event!**

For more information contact Crystal Brabender at (608)250-6132 or at [cbrabender@wisbar.org](mailto:cbrabender@wisbar.org).

# Conference Schedule

Substantive Law
  Practice Management
  Technology
  Ethics/Quality of Life

## FRIDAY – Continued

<b>Breakout Session 5</b> 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)
	Cyber Liability Insurance – What It Is, and Why You Need It (LPM)
	Jeopardy! (CLE/EPR)
12:00 p.m. - 1:00 p.m.	Lunch - Visit the Legal Expo
<b>Breakout Session 6</b> 1:00 p.m. - 1:50 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 (LAU)
1:50 p.m. - 2:10 p.m.	Break
2:10 p.m. - 2:25 p.m.	<b>Presentation of Lederer Award</b>
2:25 p.m. - 3:15 p.m. 1.0 Credit	<b>Plenary 4:</b> Gadgets, Gizmos, and Widgets (LPM)
3:15 p.m. - 4:15 p.m.	Networking Event - Connect with old friends and make new ones.

## SATURDAY – October 30, 2021

Time	Event
8:00 a.m. - 9:00 a.m. 1.0 Credit	<b>Plenary 5:</b> Substantive CLE at Sunrise (CLE)
9:00 a.m. - 9:15 a.m.	Break
<b>Breakout Session 7</b> 9:15 a.m. - 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 a.m. - 10:25 a.m.	Break
<b>Breakout Session 8</b> 10:25 a.m. - 11:15 a.m. 1.0 Credit	What Non-Bankruptcy Lawyers Need to Know About Bankruptcy (CLE)
	Why Cultural Humility Should Be Part of Your Practice (LAU)
	The Power of PDFs (LPM)
	How to Advise Clients and Manage Judicial Holds and Discovery with Social Media (CLE/EPR)
11:15 a.m. - 11:30 a.m.	Break
11:30 a.m. - 12:45 p.m. 1.5 Credits	<b>Plenary 6:</b> Most Common Ethics Mistakes Lawyers Make in Marketing Their Practice (CLE/EPR)

### Earn up to 16.5 CLE credits

with a mix of CLE, EPR, GAL, LAU, and LPM credit options.  
 Plus, earn up to 8.5 CLE and 6 EPR additional credits by  
 watching free webcast replays in December!



## THURSDAY, OCTOBER 28, 2021

8:30 - 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*

### 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

A limited number of complimentary 20-minute consultations will also be available. More details to follow.

*Jeff Lantz, Esquire Interactive LLC, Tucson, AZ*

# CLE Programs & Events

## 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

### 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 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

*Derek A. Hawkins, Amazon Web Services, Inc., Seattle; J. David Krekeler, Krekeler Strother, S.C., Madison*

## 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

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

**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

### 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; Kevin J. Palmersheim, Palmersheim Dettmann, S.C., Middleton; Christopher C. Shattuck, State Bar of Wisconsin, 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*

# CLE Programs & Events

## 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, Dietrich VanderWaal, S.C., Wausau; Joe McCarthy, Wisconsin Lawyers Mutual Insurance Company, Madison; Aiden Tharp, Emerald Valley Law LLC, Hudson*

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**FRIDAY, OCTOBER 29, 2021**

**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*

**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*

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## 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 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

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

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## 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!

*Presenters to be announced soon!*

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## 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.

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

### Cyber Liability Insurance - What It Is, and Why You Need It

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; Katherine H. Campbell, Godfrey & Kahn, S.C., Milwaukee*

## Ethics/Quality of Life

### Ethics, Jeopardy-Style!

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*

# CLE Programs & Events

1:00 - 1:50 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:

- 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

*Presenter TBD*

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**Register by October 1 and save money!**

Plus, all attendees who register by October 1 will receive a swag bag of goodies from our Sponsors and Exhibitors.

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2:25 - 3:15 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*

**SATURDAY, OCTOBER 30, 2021**

8:00 - 9:00 a.m.

Plenary Session

**Substantive CLE at Sunrise (Law Becomes CLE)**

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; Nathan E. DeLadurantey, DeLadurantey Law Office LLC, Brookfield; 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*

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*

# CLE Programs & Events

## 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
- 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

### 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

### 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 functions. 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.

*Mark Homer, CEO of 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*

## Join us for some networking fun!

You'll find plenty of time to catch up, socialize, exchange ideas, and form new networks with these special events.

### THURSDAY, OCTOBER 28, 2021

4:00 p.m. - 5:30 p.m.

#### Packer pre-game networking event

Sports fans at home can join in on the game day fun by participating in the Packer themed activities. Details to come!

### FRIDAY, OCTOBER 29, 2021

2:10 p.m. - 2:25 p.m.

#### Lederer Award Presentation

Don't miss one of the highlights of WSSFC - the presentation of the 2021 Lederer Award. Named in memory of attorney John Lederer, the award is presented annually to an individual, group, or organization exemplifying John's leadership, spirit, and dedication.

3:15 p.m. - 4:15 p.m.

#### Attendee Networking event in the Legal Expo

Visit the Legal Expo Virtual "booths" online and connect with exhibitors over group chat, private chat, or video chat.

# Attendee Information

## 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, 2021 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 cancellation 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 Credits

WSSFC will be submitted to the Wisconsin Board of Bar Examiners for up to 16.5 credits. You will sign in each morning and customize your schedule to meet your needs. Depending on the sessions attended, you can build a customized CLE schedule. Up to 16.5 overall credits will be offered. Mix and match your CLE credits from a mix options comprised of 14.0 CLE, 7.5 EPR, 1.0 GAL, 6.0 LPM, and/or 3.5 LAU.

To earn more credits post-WSSFC, attendees can watch select complimentary webcast replays in December 2021 for no additional charge. Earn up to 8.5 CLE and 6.0 EPR additional credits!

## 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

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Please print or type.

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

Name \_\_\_\_\_

State Bar No. \_\_\_\_\_

Organization \_\_\_\_\_

Email address \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

## EARLY REGISTRATION DISCOUNT

## REGISTER BY OCT. 1

### CONFERENCE TUITION

EARLY      STANDARD

For early registration discount, you must register by **October 1, 2021**.

State Bar of Wisconsin members .....	\$319 .....	\$349	\$ _____
Nonmembers .....	\$399 .....	\$419	\$ _____
Ultimate Pass Gold Subscriber .....	FREE .....	FREE	\$ _____
Ultimate Pass Silver Subscriber .....	\$159.50 .....	\$174.50	\$ _____
WALA members and Certified Paralegals .....	\$319 .....	\$349	\$ _____
Law Students .....		FREE	\$ _____
	<b>TOTAL ENCLOSED</b>		\$ _____

Check Enclosed (payable to State Bar PINNACLE)

Ultimate Pass Subscriber

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Exp. Date \_\_\_\_\_

#### 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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**17 reasons why  
you and your staff  
should attend**

**See page 6**