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WSSFC

2025

Wisconsin
Solo & Small
Firm Conference

MARQUEE SPONSOR



Conference Guide

REGISTRATION HOURS

Thursday, October 16	8:00 a.m. – 4:30 p.m.
Friday, October 17	7:45 a.m. – 4:00 p.m.
Saturday, October 18	7:45 a.m. – 10:00 a.m.

IMPORTANT: Please be sure to sign in for CLE credits at the registration table **each day** to ensure your credits are accurately recorded to the BBE

Legal Expo Hall

This year's **Legal Expo Hall** features more than 29 businesses whose products and services are designed to help you better manage your practice. Knowledgeable representatives are on hand to provide you with information on technology, insurance programs, expert services, practice management tools, marketing, research, financial services, and more. Exhibitors contribute important resources and financial support to the State Bar of Wisconsin PINNACLE Conferences & Institutes. Please return that support by visiting their booths.

LEGAL EXPO HALL HOURS:

THURSDAY: 12:05 p.m. – 6:00 p.m.
FRIDAY: 7:45 a.m. – 2:15 p.m.



Scan this QR code for complete program descriptions, course materials, maps of the conference center, and exhibitor information or go to WSSFC.org.

WIN GREAT PRIZES

Conference attendees have various ways to enter to win thousands in prizes.

Prizes include:

- Scanmarker Air Reading Pen Scanner
- Yaber T1 Pro Mini Projector
- Seagate Expansion 14TBG External Hard Drive
- Bose QuietComfort 35 II Wireless Bluetooth Headphones
- Digital Business Card
- Ring Alarm 5-piece Kit
- Plustek PS 186 Desktop Document Scanner
- Amazon Echo Show 8
- Apple Watch
- Gift Certificate for free admission/registration for 2026 AMC
- \$150 Gift Certificate towards the purchase of a PINNACLE book or seminar
- Gift Certificate for free PINNACLE CLE OnDemand seminar
- Gift Certificate for free PINNACLE Books UnBound individual title of choice
- Gift Certificate for free PINNACLE seminar or conference/institute
- \$100 Gift Certificate toward the purchase of a PINNACLE book
- \$100 Gift Certificate toward the purchase of a PINNACLE seminar or conference/institute
- And more!

A SPECIAL THANK YOU TO THE TEAM WHO MADE THIS CONFERENCE POSSIBLE

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QUALITY OF LIFE/ETHICS TRACK

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Hartland

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Plenty of Ways to Win Prizes

You have several chances to win prizes:

- Stop by the individual booths to register for the many door prizes being offered directly by exhibitors.
- Have your PASSPORT TO PRIZES signed by exhibitors and drop it at the State Bar booth by 12:00 p.m. on Friday.
- Drop your business card at the Hospitality Suite on Friday.

Thursday Evening Attendee Reception in the Legal Expo Hall

On Thursday evening, unwind from a busy day and start making new connections while enjoying complementary beer, wine, soda, hors d'oeuvres, and a cash bar from 4:20 p.m. – 6:00 p.m. *Sponsored by: Kramer, Elkins & Watt, LLC*

SAVE THE DATE!



October 21-24, 2026 - Kalahari Resort

Join us next year to connect, learn and grow at the Wisconsin Solo and Small Firm Conference 2026.

MARK YOUR CALENDARS NOW!

Join us on social media to start making connections!

Stay current on conference updates, legal news, practice insights, and more by joining us on social media. Use the conference hashtag #WSSFC to share your experience. Visit wisbar.org/social



General Information

CREDITS

WSSFC has been submitted to the Wisconsin Board of Bar Examiners (BBE) for up to **14.5 credit hours**, which can be earned by attending and reporting a combination of approved sessions. Depending on your session selections, you can earn up to 14.5 credits, comprised of a combination of CLE, EPR, LPM, and/or LAU credits.

Conference attendees also receive **FREE webcast replays** in November and December, adding **up to 7.5 additional credit hours**.

Use the schedule on pages 6-7 to track the sessions you attend and plan for webcast replays. Note that the BBE has a 6.0 credit limit per reporting period for Law Practice Management (LPM) and another 6.0 for Lawyer Awareness and Understanding (LAU) credit. If you have questions about credit, please visit the registration desk.

NAME BADGES

Please wear your badge at all official Conference functions.

It's your ticket to CLE programs, workshops, and events. Plus, wearing your badge makes it easier to reconnect with old friends and build new professional relationships. Name badge ribbons will help you identify State Bar speakers, conference sponsors, and exhibitors.

Look for the green dot on your badge—it's your admission to Friday's Lederer Award Networking Lunch. If you don't have a blue dot and would like to attend lunch, please visit the registration desk.

PLEASE RECYCLE YOUR NAME BADGE HOLDER

Before you leave the Conference, please drop your name badge holder in one of the badge collection boxes. Thanks for doing your part to reduce waste and protect the environment.



GUEST PACKAGES

To keep Conference tuition affordable, carryout food and beverages are not allowed from the Legal Expo Hall or continental breakfasts. While meals and breaks are for Conference attendees and presenters, **guest passes are available** for \$100. Each pass includes all breakfasts, luncheons, breaks, the Motion to Compete game night, the opening reception, and access to the hospitality suite. You can purchase guest passes at the registration desk.

LIST OF PREREGISTRANTS

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



Legal Tech that Changes Everything



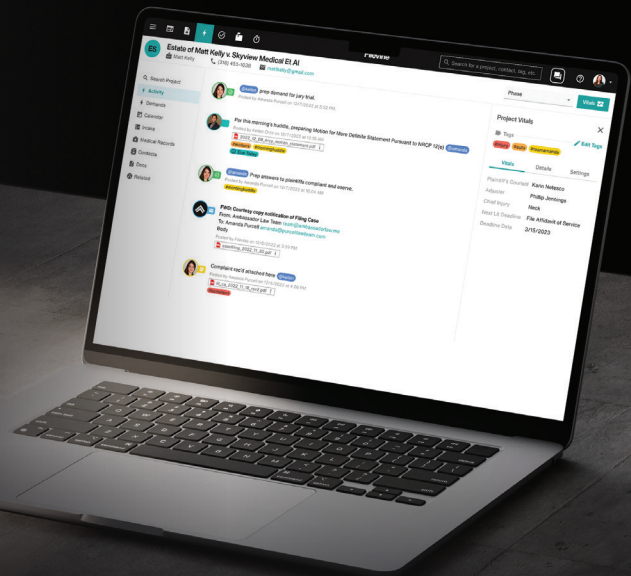
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Stay on top of deadlines with automated reminders, automated time tracking, and keep all case files organized in one secure, AI-powered system.



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Special Events

THURSDAY, OCTOBER 16

Continental Breakfast | North Atrium

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

Start your day with a hearty breakfast that energizes you for the day ahead. *Sponsored by: Clark Bolen and TABS3*

Conference Kick-Off Luncheon | Legal Expo Hall

12:05 p.m. - 1:45 p.m.

Celebrate the start of WSSFC 2025 with good food, great company, and the grand opening of the Legal Expo Hall. Enjoy a delicious lunch while reconnecting with colleagues, meeting new friends, and exploring innovative products and services from exhibitors curated specifically for solo and small firm practitioners. Don't forget to grab your **Passport to Prizes** and start filling it out for a chance to win big!

Attendee Reception | Legal Expo Hall

4:20 p.m. - 6:00 p.m.

Raise a glass to the first day of WSSFC! Unwind after a full day of learning at our lively reception. Connect with friends—old and new—over complimentary beer, wine, soda, and hors d'oeuvres. A cash bar will also be available. It's the perfect setting to kick back, relax, and continue the conversation. *Sponsored by: Kramer, Elkins & Watt, LLC.*

Friends of Bill W | Mangrove Room

4:45 p.m. - 5:45 p.m.

A printed copy of Chapter 5, and suggested open meeting with preamble will be provided.

Motion to Compete | Room 1/8

6:00 p.m. - 8:00 p.m.

Get ready to roll the dice, show off your trivia skills, and strike a pose in the photo booth at our WSSFC game night! Join fellow attendees for pizza, drinks, and plenty of chances to show off your skills during an evening of friendly competition and laughs. Win or lose, you'll leave with great memories (and maybe some bragging rights).



Playing trivia? Scan this QR code for a clue to one of the questions to give you a leg up.

Dine-Arounds

7:00 p.m.

We've got your Thursday night dinner plans covered!

Reserve your spot at a dine-around hosted by WSSFC planning committee members at some of Wisconsin Dells' best restaurants. Share a meal, swap ideas, and enjoy lively conversation in a relaxed setting.

Sign up at the conference registration desk. Space is limited and fills up fast, so don't wait! Attendees are responsible for their dinner bill. Partners are welcome – just make other plans for the kids.

The on-site restaurant option is Sortino's Italian Kitchen, and the off-site restaurant option is the Del-Bar.

FRIDAY, OCTOBER 17

Deluxe Continental Breakfast | Legal Expo Hall

7:45 a.m. - 8:30 a.m.

Fuel up for another day of learning and connection with a deluxe continental breakfast. *Sponsored by: Clark Bolen and TABS3*

Lederer Award Presentation and Networking Lunch | Room 1/8

12:10 p.m. - 1:30 p.m.

Don't miss one of the highlights of WSSFC! Join colleagues for lunch and the presentation of the **2025 Lederer Award**. Named in memory of Attorney John Lederer, this annual honor recognizes an individual, group, or organization whose leadership, spirit, and dedication reflect his legacy. *Sponsored by: Hupy & Abraham, S.C. and Solo Small Firm & General Practice Section*

Passport to Prizes Winners Announced | Legal Expo Hall

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

The moment we're all waiting for – **prize winners will be announced in the Legal Expo Hall** right after the networking luncheon. Enjoy dessert while you cheer on your colleagues and see if your Passport to Prizes entry makes you a winner! You don't need to be present to claim your prize.

Hospitality Suite | Room 3000, Sands Building

5:00 p.m. - 6:30 p.m.

The day's not over yet! Join us in the **Hospitality Suite** for wine, beer, refreshments, light snacks, and plenty of laughs. Stick around for prize drawings and the chance to take home something extra. *Sponsored by: Krekeler Law, S.C. and Lawton & Cates, S.C.*

Dine-Arounds

7:00 p.m.

Let us take care of your Friday night dinner reservations!

Reserve your spot and enjoy a table hosted by a WSSFC planning committee member at one of Wisconsin Dells' top restaurants. Skip the reservation hassles, share a delicious meal, and enjoy lively conversation with colleagues.

Sign up at the conference registration desk. Space is limited and fills up fast, so don't wait! Attendees are responsible for their dinner bill. Partners are welcome – just please make other plans for the kids.

The on-site restaurant option is Double Cut Steak House, and the off-site restaurant option is The House of Embers.

SATURDAY, OCTOBER 18

Continental Breakfast | North Hallway

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

Grab one last continental breakfast before we close out our final day together.

Visit this year's exhibitors to see how they can help you practice law, manage your business, and enjoy life.

ARAG

Bank of Sun Prairie

Bultman Financial

Civille

Digital Intelligence

Douglas Legal Nurse Consulting

ExamWorks

Filevine

Filot

Gray Paper Legal

JAMS

Legal Fit

LexisNexis

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Wispect

ATTENDEE RECEPTION

Thursday 4:20 p.m. – 6:00 p.m. — Legal Expo Hall

Enjoy complimentary beer, wine, soda, and hors d'oeuvres. A cash bar will also be available. *Sponsored by:*



KRAMER, ELKINS & WATT

CONTINENTAL BREAKFASTS

Thursday 8:00 a.m. – 8:30 a.m. | North Atrium

Friday 7:45 a.m. – 8:30 a.m. | Legal Expo Hall

Saturday 8:00 a.m. – 8:30 a.m. | Plenary Room 1/8

Sponsored by



HOSPITALITY SUITE

Friday 5:00 p.m. – 6:30 p.m. | Room 3000, Sands Building

Enjoy wine, beer, and refreshments, light snacks, and plenty of laughs.

KREKELER Law, S.C.
ATTORNEYS AT LAW



A REMINDER:
Please silence cell phones during the programs.

MOTION TO COMPETE GAME NIGHT

Thursday 6:00 p.m. – 8:00 p.m. | Room 1/8

Strike a pose in the photo booth and dive into a night of pizza, drinks, and fun at WSSFC Game Night! Bring your A-game for friendly competition, laughs, and unforgettable memories.

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

PROGRAM LEVELS |  FOUNDATIONAL |  INTERMEDIATE |  ADVANCED |  ALL EXPERIENCE LEVELS

Thursday Schedule	Substantive Track	Practice Management Track	Technology Track	Quality of Life/Ethics Track
8:00 a.m. – 4:30 p.m.	Conference Registration – Be sure to sign in each day! – North Atrium			
8:00 a.m. – 8:30 a.m.	Continental Breakfast – Sponsored By: Clark Bolen and TABS3 – North Atrium			
8:30 a.m. – 8:40 a.m.	Opening Remarks – Room 1/8			
8:40 a.m. – 9:55 a.m. 1.5 CLE Credits	Plenary 1 - Litigation ABCs: P is for Pleadings – David S. Blinka , Kathy L. Nusslock, Alexander (Sandie) T. Pendleton, Hon. John R. Remington – Room 1/8			
9:55 a.m. – 10:10 a.m.	Refreshment Break – Sponsored By: Capital Valuation Group, TrustPoint and WILMIC – North Atrium			
Session 1 10:10 a.m. – 11:00 a.m. 1.0 CLE	Under Review: A Discussion of Legal Challenges in High School Sports - Joshua M. Frieser   Tamboti/Aloeswood	Lock it Down: Cybersecurity Essentials for Small Law Practices - Katharine H. Campbell, Thomas J. Watson  Room 5	State of Law Firm Technology for Solo & Small Firms: What to Look For - Jeffrey S. Krause  Room 4	How to Say No, and Actually Follow Through: Mastering Boundaries for Lawyers - Matt Shin  Marula/Aratia
11:00 a.m. – 11:15 a.m.	Refreshment Break – Sponsored By: Lexis Nexis, Pearl Insurance and WILMIC – North Atrium			
Session 2 11:15 a.m. – 12:05 p.m. 1.0 CLE	Busting Bankruptcy Myths: What Every Lawyer Should Know - Eliza M. Reyes, Eric A. Ristau, Jennifer M. Schank   Tamboti/Aloeswood	The AI Advantage: Smarter, Faster, Ethical Lawyering - Matthew M. Beier, Dev Thain  Room 5	Implementing an AI Policy: What to Know - Brent J. Hoeft  Room 4	Efficiencies and Mindfulness in the Office, So You Can Leave the Office - Jodi A. Klagos  Marula/Aratia
12:05 p.m. – 6:00 p.m.	Legal Expo Hall Open – Rooms 2,3,6,7			
12:05 p.m. – 1:45 p.m.	Conference Kickoff Luncheon in the Legal Expo Hall (Ticketed Event) – Sponsored By: Habush, Habush & Rottier, S.C.			
Session 3 1:45 p.m. – 2:35 p.m. 1.0 CLE	Representing Businesses Across State Lines - Matthew M. Beier, Erin E. Rome  Marula/Aratia	Likes, Leads, and Legal Clients: Marketing Your Firm in the Digital Age Lindsay Marty, Stacy J. Schlemmer, Steve Stauff  Room 5 - No CLE	Practical Uses of AI Outside of Client Matters Fatimeh D. Pahlavan  Room 4	Lawyering in Uncertain Times: Supporting Clients in Turbulent Political and Economic Climates - Patricia McKinney-Lins, Sarah E. Peterson   Tamboti/Aloeswood
2:35 p.m. – 3:00 p.m.	Refreshment Break – Sponsored By: Above the Bar Marketing, Capital Valuation Group, and Pemberton Personal Injury Law Firm – Legal Expo Hall			
Session 4 3:00 p.m. – 4:20 p.m. 1.5 CLE	Lien on Us: An Overview of Security Interests under Wisconsin Law - James V. Block, Christopher J. Dodge, Kimberly P. Sebranek  Marula/Aratia	Solo but Not Sinking: Profitable Practice Strategies for Small Firms - Dixon R. Gahnz  Room 5	Document Automation: Streamlining Your Workflow - Nerino J. Petro, Jr., Bryan Sims  Room 4	Breaking the Silence: Mental Health and Addiction Across Generations - Joseph A. Bugni, Peter J. Carman, Rachel T. Schromen, April Toy   Tamboti/Aloeswood
4:20 p.m. – 6:00 p.m.	Attendee Reception – Enjoy wine and refreshments - Sponsored By: Kramer, Elkins & Watt, LLC – Legal Expo Hall			
4:45 p.m. – 5:45 p.m.	Friends of Bill W. – Mangrove			
6:00 p.m. – 8:00 p.m.	Motion to Compete Game Night – Room 1/8			
7:00 p.m.	Dine-Arounds – Meet at your selected venue at 7:00 p.m.			

 Programs that will be offered as webcast replays.

Follow us on social media for conference updates, legal news, practice insights, and more. Use the conference hashtag #WSSFC to share your experience.



Friday Schedule	Substantive Track	Practice Management Track	Technology Track	Quality of Life/Ethics Track
7:45 a.m. – 4:00 p.m.	Conference Registration – Be sure to sign in each day! – Legal Expo Hall			
7:45 a.m. – 8:30 a.m.	Continental Breakfast – Sponsored By: Clark Bolen and TABS 3 – Legal Expo Hall			
7:45 a.m. – 2:15 p.m.	Legal Expo Hall Open – Rooms 2,3,6,7			
8:00 a.m. – 8:30 a.m.	Inside the Exclusive Group Health Plan Offered to Wisconsin Law Firms – Tamboti/Aloeswood  (No CLE)			
8:30 a.m. – 9:50 a.m. 1.5 CLE	Plenary 2: 25 Things Every Lawyer Should Know – Jeffrey M. Glazer, Jessica Y. Harrison, Kathryn L. Knowlton, Kevin Trost, Reg P. Wydeven – Room 1/8			
9:50 a.m. – 10:10 a.m.	Refreshment Break – Sponsored by: FileVine, JAMS and WILMIC – Legal Expo Hall			
Session 5 10:10 a.m. – 11:00 a.m. 1.0 CLE	An Introduction to Indian Law - Paul W. Stenzel  Room 4	Can You Negotiate? - Gregg M. Herman, Nicholas C. Watt  Room 5	“Prompting” Success for Law Firms – Tips for Engineering Effective Prompts to Get the Most out of AI - Bonita J. Shucha, Kristopher Turner   Tamboti/Aloeswood	Streamlining Your Life and Practice to Reclaim Your Time - Fatimeh D. Pahlavan  Marula/Aralia
11:00 a.m. – 11:20 a.m.	Refreshment Break – Sponsored By: ARAG, Digital Intelligence and WILMIC – Legal Expo Hall			
Session 6 11:20 a.m. – 12:10 p.m. 1.0 CLE	Validating Veterans Benefits: A Legal Overview of Benefit Programs for Those Who Served - Shana M. Dunn, Travis J. West  Room 4	Billable Hours and the Great Fee Debate - Jay D. Koritzinsky, Briane F. Pagel, Jr.  Room 5	50 Tips in 50 Minutes - Brent J. Hoeft, Nerino J. Petro, Jr., Bryan Sims   Tamboti/Aloeswood	Navigating Major Life Challenges - Bradley J. D’Orazio, Rachel T. Schromen  Marula/Aralia
12:10 p.m. – 1:30 p.m.	Networking Lunch and Presentation of the 2025 Lederer Award - Sponsored By: Hupy & Abraham and Solo Small Firm & General Practice Section – Room 1/8 (Ticketed Event)			
1:30 p.m. – 2:15 p.m.	Dessert Break – Passport to Prizes and other Prizes Awarded – Sponsored By: WILMIC – Legal Expo Hall			
Session 7 2:30 p.m. - 3:20 p.m. 1.0 CLE	Considerations for (No Longer) Cohabiting Couples - Christopher S. Krimmer, Evan M. Mayer  Room 5	The Exit Strategy: Succession Planning for Small Firm Lawyers - J. David Krekeler, Thomas R. Schumacher   Tamboti/Aloeswood	Mastering Word - Barron K. Henley  Room 4	Lawyers in the Community: Ethical Considerations of Being a Lawyer and a Community Member - Matthew M. Beier, Matthew Jacopelli, Stacie H. Rosenzweig  Marula/Aralia
3:20 p.m. – 3:40 p.m.	Refreshment Break – Sponsored By: Filot, Pearl Insurance and Practice Panther - North Hallway			
3:40 p.m. – 5:00 p.m. 1.5 CLE	Plenary 3: Navigating Deepfake Technology – Cheryl (Cheri) A. Hipenbecker, Prof. Derek Riley – Room 1/8			
5:00 p.m. – 6:30 p.m.	Hospitality Suite – Enjoy wine and refreshments – Sponsored By: Krekeler Law S.C. and Lawton Cates, S.C. – Room 3000 in Sands Building			
7:00 p.m.	Dine-Arounds – Meet at your selected venue at 7:00 p.m.			

Saturday Schedule	Substantive Track	Practice Management Track	Technology Track	Quality of Life/Ethics Track
7:45 a.m. – 10:00 a.m.	Conference Registration - Be sure to sign in each day! - North Hallway			
8:00 a.m. – 8:30 a.m.	Continental Breakfast – Sponsored By: Clark Bolen and TABS3 – Room 1/8			
8:30 a.m. – 9:20 a.m. No CLE	Plenary 4: Gadgets, Gizmos, and Widgets – Nerino J. Petro, Jr., Bryan Sims - Room 1/8			
9:20 a.m. – 10:00 a.m.	Refreshment Break – Sponsored By: ARAG, Filot and WILMIC - Room 1/8			
10:00 a.m. – 10:50 a.m. 1.0 CLE	Plenary 5: Strategies for Getting Better Sleep – Susan Hoefs - Room 1/8			
10:50 a.m. – 11:10 a.m.	Refreshment Break – Sponsored By: ARAG, Filot and WILMIC - Room 1/8			
11:10 a.m. – 12:25 p.m. 1.5 CLE	Plenary 6: Security is a Team Sport – Barron K. Henley - Room 1/8			

 Programs that will be offered as webcast replays.

Program Descriptions

PROGRAM LEVELS | F FOUNDATIONAL | I INTERMEDIATE | A ADVANCED | X ALL EXPERIENCE LEVELS

Day One

Plenary 1 Session – 8:30 a.m. – 9:55 a.m.

Litigation ABCs: P is for Pleadings

Pleadings are the bedrock of any litigation matter, defining claims, defenses, and the scope of the dispute. In this practical and engaging plenary, solo and small firm litigators will learn effective strategies for drafting clear, persuasive pleadings. You'll cover the essentials of complaints (including those requiring heightened pleading standards), answers, affirmative defenses, dispositive motions, and trial briefs. Walk away with concrete tips to sharpen your drafting skills and take your litigation practice to new heights.

David S. Blinka, *Habush, Habush & Rottier, SC, Madison*

Kathy L. Nusslock, *Concurrence ADR LLC, Milwaukee*

Alexander (Sandie) T. Pendleton, *Pendleton Legal, S.C., Milwaukee*

Hon. John R. Remington, *Milwaukee Circuit Court, Milwaukee*

Breakout Session One – 10:10 a.m. – 11:00 a.m.

Under Review: A Discussion of Legal Challenges in High School Sports F X (CLE)

From eligibility disputes to officiating complaints, high school sports are seeing an uptick in legal scrutiny. Delve into the growing number of legal challenges involving student athletes, school districts, and athletic associations, including disciplinary actions and appeals. You'll examine how due process, policy, and legal advocacy intersect in the world of high school sports.

Joshua M. Frieser, *Frieser Legal LLC, Milwaukee*

Lock it Down: Cybersecurity Essentials for Small Law Practices X (LPM)

Phishing scams, ransomware, and data breaches are growing threats, and small firms are high-value targets. Secure your practice by learning practical steps to protect client data, manage confidential communications, and enhance your cybersecurity protocols. You'll also receive a plain-language breakdown on cyber insurance: what it covers, what it doesn't, and why it's a must-have for small firms. Stay ahead of the threats and safeguard your firm's reputation before a breach puts everything at risk.

Katharine H. Campbell, *Neal Gerber & Eisenberg LLP, Chicago, IL*

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

State of Law Firm Technology for Solo & Small Firms: What Technology to Look For X (LPM)

From case management systems to cutting-edge hardware, law firm tech is evolving fast. Get up to speed on the latest tools and trends that matter most for solo and small firm success. You'll pick up practical guidance on evaluating new products, upgrading your tech stack, and selecting solutions that boost efficiency and improve client service, without blowing your budget.

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

How to Say No, and Actually Follow Through: Mastering Boundaries for Lawyers X (LAU)

As a lawyer, saying "yes" to every request may seem like part of the job. But it can lead to burnout, blurred boundaries, and decision fatigue. Learn how to establish boundaries without guilt or negative



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consequences. Discover techniques for protecting your time and energy, communicating boundaries with clients and colleagues, and truly unplugging to recharge. Leave with strategies that support a healthier work-life balance, reduce stress, improve decision making, and help you become a more effective (and happier) lawyer.

Matt Shin, *Sidebar Counseling LLC, Wausau*

Breakout Session Two – 11:15 a.m. – 12:05 p.m.

Busting Bankruptcy Myths: What Every Lawyer Should Know 🗣️ (CLE)

Bankruptcy can affect clients in nearly every practice area. Are you prepared to respond? Find out how to handle a bankruptcy notice, navigate the automatic stay, and spot red flags like preferential or fraudulent transfers. Additionally, receive guidance on securing payment during a bankruptcy case. Demystify the process and get a handle on the essentials, even if you don't practice bankruptcy law.

Eliza M. Reyes, *Richman & Richman LLC, Madison*

Eric A. Ristau, *Laffey, Sebranek, Auby & Ristau, S.C., Madison*

Jennifer M. Schank, *Fuhrman & Dodge, S.C., Middleton*

The AI Advantage: Smarter, Faster, Ethical Lawyering 🗣️ (LPM)

AI won't be replacing lawyers, but lawyers who know how to use AI will replace those who don't. See how AI can take tedious tasks off your plate, speed up research, and help you serve clients more effectively, without compromising on ethics or security. You'll receive practical advice on selecting the right tools, avoiding common pitfalls, and leveraging technology to enhance your practice without losing the human touch.

Matthew M. Beier, *Wisconsin Lawyers Mutual Insurance Company, Madison*

Dev Thain, *Spellbook, Ottawa, Ontario, Canada*

Implementing an AI Policy: What to Know 🗣️ (LPM)

As AI tools become increasingly common in legal practice, having a clear and thoughtful AI policy is no longer optional. Learn what a well-crafted AI policy should include, from ethical safeguards and operational procedures to compliance with legal standards. You'll learn how to develop a comprehensive AI policy that reflects your firm's values, protects client interests, and sets clear expectations for responsible AI use.

Brent J. Hoeft, *State Bar of Wisconsin, Madison*

Efficiencies and Mindfulness in the Office, So You Can Leave the Office 🗣️ (LAU)

Long hours don't always lead to better outcomes. Discover how to boost productivity with practical time management techniques and more intelligent workflows. Tap into the science behind mindfulness—how it enhances focus, supports emotional balance, and helps reduce stress. Walk away with tactics to help you accomplish more during the day so that you can reclaim your evenings, weekends, and overall well-being.

Jodi A. Klagos, *Godfrey & Kahn, S.C., Madison*

Breakout Session Three – 1:45 p.m. – 2:35 p.m.

Representing Businesses Across State Lines 🗣️ (CLE)

As clients expand their businesses beyond Wisconsin, so do the legal questions. Can you advise on out-of-state contracts, employees, or sales? What if a client wants one go-to lawyer across jurisdictions? Survey the practical and ethical issues that arise when advising businesses with multi-state operations. Learn what's permissible,

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what's risky, and how to serve growing clients effectively, without overstepping professional boundaries.

Matthew M. Beier, *Wisconsin Lawyers Mutual Insurance Company, Madison*
Erin E. Rome, *Palmer Dettman, S.C., Middleton*

Likes, Leads, and Legal Clients: Marketing Your Firm in the Digital Age ① (No CLE)

Digital marketing isn't just for influencers and large corporations. It's a powerful tool for solo and small firm lawyers, too. Learn how to build a credible online presence, attract ideal clients, and convert engagement into business (i.e., paying clients). From social media to search engine optimization (SEO), you'll get practical tips for growing your firm's visibility and turning clicks into cases without breaking the bank.

Lindsay Marty, *Above the Bar Marketing LLC, Madison*
Stacy J. Schlemmer, *Peterson, Berk & Cross, S.C., Green Bay*
Steve Stauff, *Above the Bar Marketing LLC, Madison*

Practical Uses of AI Outside of Client Matters ③ (LPM)

Beyond legal research and drafting documents, generative AI can be an asset in the daily operation of your practice. Discover how to use AI to enhance your website and social media presence, streamline client onboarding, create internal policies and procedures, and support team communication and task management. Gain fresh ideas for integrating AI into your firm's workflow to improve efficiency, organization, and the overall client experience.

Fatimeh D. Pahlavan, *Ogden Glazer + Schaefer, Chicago, IL*

Lawyering in Uncertain Times: Supporting Clients in Turbulent Political and Economic Climates ② (LAU)

Clients often turn to their lawyers for reassurance and guidance when the world feels unpredictable. Learn how to offer grounded support during periods of market volatility, rapid regulatory changes, and heightened political tension. Get tips for managing client expectations, avoiding conflicts of interest, and maintaining professional boundaries while remaining a steady, trusted resource in challenging times.

Patricia McKinney-Lins, *Neider & Boucher, S.C., Madison*
Sarah E. Peterson, *State Bar of Wisconsin, Madison*

Breakout Session Four – 3:00 p.m. – 4:20 p.m.

Lien on Us: An Overview of Security Interests under Wisconsin Law ① (CLE)

Get a practical overview of liens and security interests that arise by contract or statute, including judgment, construction, and mechanics' liens. You'll learn how to preserve, perfect, and enforce these interests—and recognize when they can be set aside in certain proceedings. Strengthen your ability to protect clients' interests in secured transactions under Wisconsin law.

James V. Block, *Krautkramer & Block LLC, Wausau*
Christopher J. Dodge, *Fuhrman & Dodge, S.C., Middleton*
Kimberly P. Sebranek, *Laffey, Sebranek, Auby & Ristau, S.C., Madison*

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Solo but Not Sinking: Profitable Practice Strategies for Small Firms 🗝️ (LPM)

Are you wearing all the hats and making the coffee, too? When you're the lawyer, office manager, and tech support, running a firm can feel overwhelming. Learn how to balance your caseload with day-to-day operations, identify affordable tech solutions that work for you, and design a business model tailored to your practice. You'll gain strategies to streamline your workflow and strengthen your bottom line.

Dixon R. Gahnz, *Lawton & Cates, S.C., Madison*

Document Automation: Streamlining Your Workflow 📄 (LPM)

Document automation has come a long way, offering more advanced and user-friendly solutions than ever before. Discover how to simplify document creation and reduce errors using tools like text expansion, QuickParts, and document assembly programs like Pathagoras, TheFormTool, and Spellbook. You'll walk through practical ways to automate repetitive tasks and improve accuracy, saving time and enhancing consistency across your practice. Whether you're updating an existing system or starting from scratch, this session provides a clear path to smarter document management.

Nerino J. Petro, Jr., *NerinoPetro LLC, Rockford, IL*
Bryan Sims, *Sims Law Firm, Ltd., Naperville, IL*

Breaking the Silence: Mental Health and Addiction Across Generations 🗝️ (LAU)

Hear from attorneys across generations who've faced mental health and addiction challenges—and found the courage to seek help. Panelists will share personal stories about confronting burnout,

perfectionism, and other unique pressures of the legal profession. You'll gain insight into shifting cultural attitudes, barriers to seeking support, and the strategies that helped them find balance and resilience. Learn how to recognize signs of distress, reduce stigma, and support a healthier legal career and community.

Joseph A. Bugni, *Hurley Burish, S.C., Madison*
Peter J. Carman, *Law Office of Peter J. Carman, S.C., Appleton*
Rachel T. Schromen, *Schromen Law LLC, St. Paul, MN*
April Toy, *Hinshaw & Culbertson LLP, Milwaukee*

Day Two

Inside the Exclusive Group Health Plan Offered to Wisconsin Law Firms – 8:00 a.m. – 8:30 a.m.

Plenary 2 Session – 8:30 a.m. – 9:50 a.m.

25 Things Every Lawyer Should Know (CLE)

From nonprofit basics to CHIPS cases, real estate to digital assets, this rapid-fire primer delivers insights across multiple areas of law that every solo and small firm practitioner should be aware of. Gain enough information to help you field the inevitable, “hey, you’re a lawyer, right?” cocktail party questions, make informed client referrals, and explore new practice areas. You’ll leave with a broader understanding of key issues, and maybe even a few ideas for expanding your client services.

Jeffrey M. Glazer, *Ogden Glazer + Schaefer, Madison*
Jessica Y. Harrison, *Scholz Nonprofit Law LLC, Madison*
Kathryn L. Knowlton, *Knowlton Law Group LLC, Stone Lake*
Kevin D. Trost, *Trost LLC, Madison*
Reg P. Wydeven, *McCarty Law LLP, Appleton*

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Breakout Session Five – 10:10 a.m. – 11:00 a.m.

An Introduction to Indian Law **F** (CLE)

Understanding the fundamentals of Indian law is essential for attorneys who encounter matters involving tribal governments, land, or jurisdictional questions. This session offers a high-level overview of key concepts, including tribal sovereignty, tribal court systems, sovereign immunity, reservations and trust land, and tribal income. Gain clarity on how federal, state, and tribal legal systems interact and how these principles can touch a range of practice areas.

Paul W. Stenzel, *Hansen & Hildebrand, S.C., Milwaukee*

Can You Negotiate? **F** (CLE)

With most civil disputes ending in settlement, strong negotiation skills are a must-have for any lawyer. Learn how to sharpen your approach with insights from seasoned litigators and mediators as they discuss best practices for timing your offer, evaluating both sides of the case, approaching settlement discussions, drafting clear proposals and agreements, and more. Whether you're in early talks or nearing a resolution, you'll gain practical techniques to help secure better outcomes for your clients.

Gregg M. Herman, *JAMS, Milwaukee*

Nicholas C. Watt, *Kramer, Elkins & Watt LLC, Madison*

"Prompting" Success for Law Firms – Tips for Engineering Effective Prompts to Get the Most out of AI **F** **I** (LPM)

Getting useful results from AI starts with asking the right questions. Literally. This step-by-step tutorial guides you through crafting prompts that get the job done, whether you're drafting content, summarizing documents, or tackling administrative tasks. Think of it as prompt-writing with a purpose: simple tweaks, big time savings, and better results. No tech degree required!

Bonita J. Shucha, *University of Wisconsin Law Library, Madison*

Kristopher Turner, *University of Wisconsin Law Library, Madison*

Streamlining Your Life and Practice to Reclaim Your Time **X** (LAU)

Drowning in emails, forms, and to-do lists? It's time to let AI throw you a lifeline. Learn how to lighten your load by automating repetitive tasks, managing documents more efficiently, and freeing up time for real legal work—and real life! From client communication to behind-the-scenes admin work, discover how to make AI your time-saving sidekick without losing your personal touch or your professionalism.

Fatimeh D. Pahlavan, *Ogden Glazer + Schaefer, Chicago, IL*

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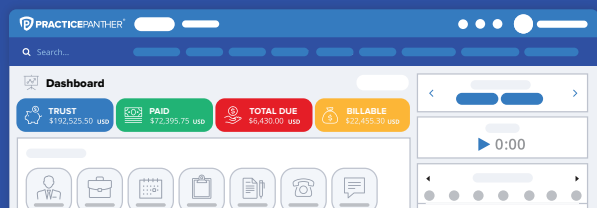
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Breakout Session Six – 11:20 a.m. – 12:10 p.m.

Validating Veterans Benefits: A Legal Overview of Benefit Programs for Those Who Served 🇺🇸 (CLE)

Explore how legal and administrative systems govern access to veterans' benefits. Receive an overview of key federal programs, including disability compensation, benefits for surviving spouses and dependents, and loan opportunities. You'll learn how these programs are structured, how claims are processed, and what legal professionals should consider when assisting those who've served.

Shana M. Dunn, *West & Dunn, Waunakee*

Travis J. West, *West & Dunn, Waunakee*

Billable Hours and the Great Fee Debate 🕒 (LPM)

Billing and collections can be a nightmare for small firms. From fee consultations to fee structures, interest to late charges, getting paid isn't always straightforward. Rest easy with practical strategies for tracking time, automating invoices, and handling overdue payments with professionalism. Balancing happy clients with healthy cash flow? That's the dream, and it's more achievable than you think.

Jay D. Koritzinsky, *Koritzinsky & Karles LLC, Madison*

Briane F. Pagel, Jr., *Lawton & Cates, S.C., Madison*

50 Tips in 50 Minutes 🕒 🧑 (LPM)

Buckle up for a fast-paced, tip-packed power hour designed to supercharge your practice. In just 50 minutes, you'll pick up 50 actionable tech-savvy tactics that can help you work smarter, faster, and with fewer headaches. From time-saving tools to workflow hacks,

this rapid-fire session delivers bite-sized brilliance that you can put to use right away.

Brent J. Hoeft, *State Bar of Wisconsin, Madison*

Nerino J. Petro, Jr., *NerinoPetro LLC, Rockford, IL*

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

Navigating Major Life Challenges 🕒 (LAU)

Marriage, divorce, parenthood, retirement, or the loss of a loved one—life's big transitions often ripple into your legal practice. In this candid session, you'll gain tools to manage stress, set boundaries, and prioritize well-being without losing sight of professional goals. Discover strategies for adjusting your workload, preserving client relationships, and rethinking your path during times of change so you can weather personal upheaval without sacrificing a fulfilling career.

Bradley J. D'Orazio, *Marriage & Family Solutions, Verona*

Rachel T. Schromen, *Schromen Law LLC, St. Paul, MN*

Breakout Session Seven – 2:30 p.m. – 3:20 p.m.

Considerations for (No Longer) Cohabiting Couples 🇺🇸 (CLE)

With more couples choosing to live together without marrying, breakups can raise thorny legal questions. Examine the remedies available when cohabiting partners separate, including equitable claims like unjust enrichment, implied contract, and partition. You'll explore how courts apply these doctrines and gain insight into helping clients protect their rights and resolve disputes when the relationship ends.

Christopher S. Krimmer, *Forward Legal Services, Madison*

Evan M. Mayer, *Weld Riley SC, Wausau*



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The Exit Strategy: Succession Planning for Small Firm Lawyers (LPM)

You've decided it's time to pass the torch and protect your legacy, but now what? Move beyond theory to take concrete steps toward succession. Learn how to structure and implement buy-sell agreements, assess the value of your practice, and identify and prepare potential successors. You'll explore timelines, financial planning, and client transition strategies to ensure your firm winds down—or carries on—with clarity and continuity.

J. David Krekeler, *Krekeler Law S.C., Madison*

Thomas R. Schumacher, *Bakke Norman S.C., New Richmond*

Mastering Word (LPM)

Don't fight with your documents, master them. Delve into Microsoft Word's most powerful features for legal professionals, from advanced formatting tools to time-saving shortcuts and error-reducing techniques. You'll learn how to streamline document creation, improve consistency, and take control of Word's capabilities to support a more efficient and accurate workflow.

Barron K. Henley, *Affinity Consulting Group, Columbus, OH*

Lawyers in the Community: Ethical Considerations of Being a Lawyer and a Community Member (EPR)

Whether serving on a nonprofit board, mentoring a colleague, or networking locally, lawyers never truly take off their professional hats.

Take stock of the ethical duties that follow you into the community, including confidentiality, conflicts of interest, and the boundaries of legal advice. You'll gain practical insight into applying the rules of professional responsibility outside the office while maintaining your integrity and supporting the communities you serve.

Matthew M. Beier, *Wisconsin Lawyers Mutual Insurance Company, Madison*

Matthew Jacopelli, *Karrmann Law Offices LLC, Platteville*

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

Plenary 3 Session – 3:40 p.m. – 5:00 p.m.

Navigating Deepfake Technology (CLE)

Artificially created “deepfakes” are blurring the line between fact and fiction, with alarming implications for legal professionals. In this eye-opening session, you'll explore how deepfakes are created, what makes them convincing, and why they're increasingly used in scams, especially in real estate. Examine real-world examples and learn practical techniques to spot fake content using metadata, search tools, and subtle audio-visual clues. You'll be better equipped to assess digital evidence and protect your practice from manipulation.

Cheryl (Cheri) A. Hipenbecker, *Knight Barry Title, Inc., Milwaukee*

Prof. Derek Riley, Ph.D., *Milwaukee School of Engineering, Milwaukee*



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Day Three

Plenary 4 Session – 8:30 a.m. – 9:20 a.m.

Gadgets, Gizmos, and Widgets (No CLE)

Part tech show-and-tell, part office therapy, this WSSFC favorite is back with hacks to upgrade your workflow and lower your blood pressure! You'll uncover clever tricks, budget-friendly tools, and smart ways to squeeze more from the tech you already own. From time-saving gadgets to stress-busting gizmos, you'll leave with fresh ideas, fun finds, and maybe even a new favorite widget you didn't know you needed—until now.

Nerino J. Petro, Jr., *NerinoPetro LLC, Rockford, IL*
Bryan Sims, *Sims Law Firm, Ltd., Naperville, IL*

Plenary 5 Session – 10:00 a.m. – 10:50 a.m.

Strategies for Getting Better Sleep (LAU)

Sleep is a pillar of wellness, but too many attorneys are running on empty. With long hours, high stress, and irregular schedules, it's no wonder lawyers are among the most sleep-deprived professionals. Explore how sleep impacts cognitive performance, mood, and overall health. You'll learn how to assess your sleep habits, identify common disruptors, and build healthier routines. Gain strategies to help you rest better, feel better, and show up sharper.

Susan Hoefs, CCSH, RPSGT, *Wisconsin Sleep Society, Oconomowoc*

Plenary 6 Session – 11:10 a.m. – 12:25 p.m.

Security is a Team Sport (EPR)

You don't need to be a tech expert to protect client data, but you do need to take action. Discover straightforward, cost-effective ways to secure your devices, emails, wireless networks, and documents while staying compliant with Supreme Court Rule 1.6. Find out how to back up your data, use encryption tools, and ask the right questions to avoid common security missteps. With practical tips and accessible methods, you can safeguard your practice without breaking the bank (or your brain).

Barron K. Henley, *Affinity Consulting Group, Columbus, OH*



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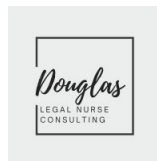
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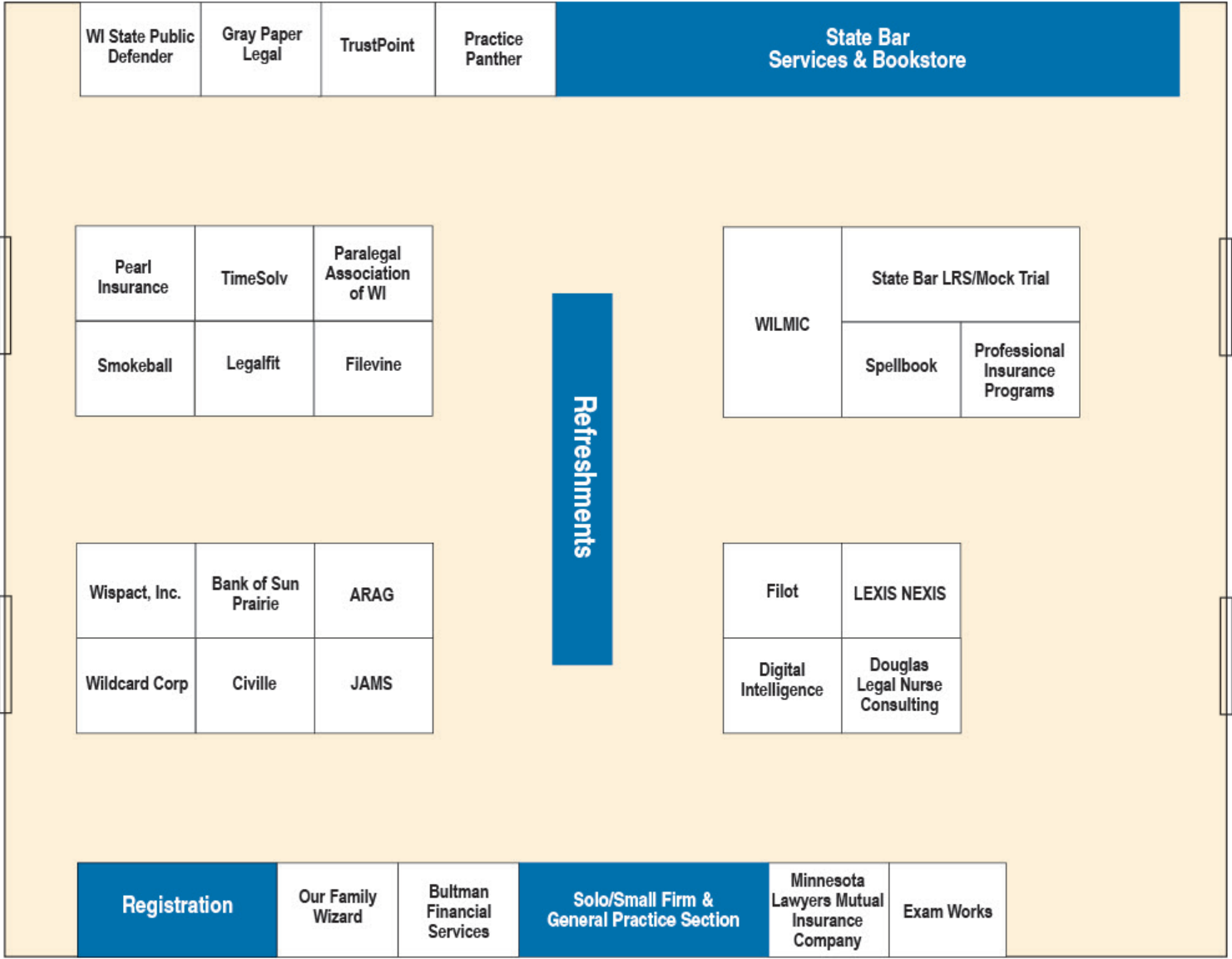


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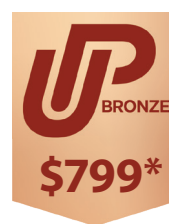
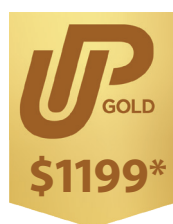
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