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STATE BAR OF WISCONSIN
PINNACLE
*Your Practice. Our Purpose.*

## WSSFC 2026

## Technology Track – Session 2

# Getting Your (Dues) Money's Worth: What Your State Bar Can Do For You

**Presented By:**

*Panel of State Bar of Wisconsin Staff*
*Madison*

# Practice 411
# Law Office Management Assistance Program (LOMAP)

**Contact**
Atty Brent Hoeft, Practice Management Advisor and LOMAP Manager
practicehelp@wisbar.org
608-250-6012

**Useful Tips**

- Available to all State Bar Members and exists for the purposes of providing guidance and education on all things related to the business, operations, and technology side of your practice.
- Provides presentations, articles, podcasts and **free** practice management consultations assisting members in navigating and improving the day-to-day practice of law.
- See program webpage to schedule a consultation or for more resources www.wisbar.org/practice411

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# Ethics Hotline

**Contacts**
Sarah Peterson, Ethics Counsel
speterson@wisbar.org

Timothy Pierce, Ethics Counsel
tpierce@wisbar.org

Ethics Hotline: 1-800-254-9154

**Link**
Ethics Counsel

**Useful Tips**

- All calls to the hotline are confidential. We do not confirm or deny calls took place, nor what subject matter was discussed. We do not share call information with OLR or anyone else. There are no exceptions to this rule.
- The hotline can only answer questions about the caller's behavior. We cannot opine on the conduct of third parties. In other words, we will not give you an opinion as to whether opposing counsel is violating a rule.
- We prefer calls to emails. We almost always have follow-up questions and those are easier to handle on the phone, rather than on a whole string of emails.
- Please leave us your direct phone number and be sure your voicemail is set up and has room to accept messages.
- We frequently get calls about:
    - Conflicts of interest: Can I represent client A when I represented opposing party in a matter X 4 years ago?
    - Withdrawing from representation: Do I have grounds to withdraw? What should I say in my motion to withdraw? What if the judge won't let me off the case?
    - Candor toward the tribunal: I recently found out my client made a misrepresentation in an affidavit I filed on their behalf. What do I do?

# Wisconsin Lawyers Assistance Program (WisLAP)

**Contact**
callwislap@wisbar.org
WisLAP Line: (800) 543-2625

**Link**
Wisconsin Lawyers Assistance Program

**Useful Tips**

- WisLAP does not require callers to disclose their identity.
- WisLAP is exempt from reporting professional misconduct to the Office of Lawyer Regulation (OLR) under Wisconsin Supreme Court Rule 20:8.3(c)(2) and to the Judicial Commission under Wisconsin Supreme Court Rule 60.04(3).
- WisLAP services are free as a benefit of your State Bar membership and available to everyone in the legal community.
- Health / Mental Health, Substance Use Disorder, Support Groups, Newsletters, Articles, Task Force on Wisconsin Lawyer Well-Being

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# Affinity Programs (Member Discounts)

**Contact**
Annette Ashley, Director of Professional Services and Development
aashley@wisbar.org
608-250-6133

**Link**
Member Discount Programs

**Useful Tips**

- Insurance & Member Benefits Committee, aims to locate vendors who provide product or services valuable to our members including exclusive discounts, on everything from insurance, technology and practice software, financial products, to travel and lifestyle discounts.
- Including **vLex Fastcase** a free legal research tool included with your state bar membership.
- Current version of the product provides legal research across all 50 States and federal law, has a built-in good law citator and includes case summaries and headnotes.
- Check out the Member Discount Programs page for more information.

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# Leadership Development Summit
# G. Lane Ware Leadership Academy

**Contact**
Annette Ashley, Director of Professional Services and Development
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**Leadership Development Summit (short, 4-hour program)**

- Goal: Help new lawyers begin their State Bar leadership journey, and find the right fit to meet their interests.
- Focus: Helping them understand
    - Why service is beneficial personally and professionally
    - How to balance work and volunteer time
    - How to convince supervising attorneys it's a good use of time

**G. Lane Ware Leadership Academy (3 sessions—1 ½ days each—and more comprehensive)**

- Goal: Make the Leap to Leadership by finding your leadership strengths and work to manage your leadership weaknesses.
- Focus: effective written and verbal communication, time management, public speaking, restorative leadership, working through conflict and facing difficult conversations.
- It encourages lawyers to take on leadership roles
    - Where they work
    - In their communities
    - In the profession

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# Seminars

**Contact**
Timothy Clark, Seminars Division Manager
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608-250-6110

**Link**
Marketplace

**Useful Tips**

- 90-day archive – attendees of SBW PINNACLE seminars, regardless of format, get access to the video of the seminar for 90 days. It looks and feels just like an OnDemand seminar and can be found at Wisbar.org/mystatebar/mymedia/Prior Seminar Archives. You can start, stop, rewind, fast forward and watch as many times as you like. But you cannot claim credit for watching the archive.
- Downloadable PDF materials – the course materials for the seminar can be found at Wisbar.org/mystatebar/mymedia/Now Playing on the date of the event and then in the Prior Seminar Archive for the next 90 days. Pro tip: download and save it before the 90 days expire if you want a copy.
- For new lawyers and lawyers looking to expand areas of practice our Build Your Practice series and our Foundational First series are great places to start.
    - Most of the BYPs are done every 3 years and then they have credit attached on OnDemand for about 2 years. Estate Planning 1 and 2 are offered every year.
    - Foundational Firsts go into more in depth on a particular task, like first appearance, or drafting a motion.
        - If you have an idea for a topic, we are looking to expand this catalog
    - Young Lawyers Division members get a discount on every BYP program for $20 off of the tuition.
    - RPPT has been sponsoring a section member discount to the main Estate Planning and Real Estate seminars for a number of years. This year it will be for $25 off the tuition four the Annual Estate Planning Update, the Annual Real Estate Update, and the Build Your Practice Estate Planning I and II seminars.

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# OnDemand

**Contact**
Timothy Clark, Seminars Division Manager
tclark@wisbar.org
608-250-6110

**Link**
CLE OnDemand

**Useful Tips**

- OnDemand gives you access to the seminar and the course materials for the same 90 days that get with the archive referenced above. The difference is you can claim the credit hours on your report to the Board of Bar Examiners. The current limitations are:
    - Only 15 of your 30 credit hours can come from the OnDemand format
    - None of your EPR credits can be from OnDemand
    - You cannot claim OnDemand credits if you are reinstating your license
- OnDemand format has credit attached for the remainder of the calendar year it was created in and then for one more full calendar year. Our marketplace indicates if there is a credit or not and it lets you know when the credit lapses.

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# State Bar of Wisconsin – Certified Paralegal

**Contact**
Dan Sitzler, Learning and Development Specialist
dsitzler@wisbar.org
608-250-6079

**Link**
SBWCP Designation

**Useful Tips**

- Certified Paralegals already in the program with the State Bar enjoy the following:
  - Member rates on CLE and select books.
  - Access to the certified paralegal community listserv
  - 50% off the General Certification Exam fee (which is now required and the new standard for all new paralegal applicants to the program).
- For firms of all sizes
  - Raise the bar for your team: Use the credential as a hiring and performance standard when building out or evaluating your paralegal staff.
  - Strengthen your firm's credibility: A credentialed leader signals to clients, courts, and colleagues that your operation meets a recognized professional standard.
  - Lead by example: Show your paralegals what a serious investment in professional development looks like and set the expectation that certification matters at your firm.
  - Build Client Trust: Certified paralegals reinforce your commitment to ethical, high-quality legal service and strengthen client confidence.

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# Books

**Contact**
Caitlin Gutoski, Product and Publications Manager
cgutowsk@wisbar.org
608-250-6113

**Link**
Marketplace - Books

**Useful Tips**

- Don't reinvent the Wisconsin wheel
- My tip for our books is simple: before you build something from scratch, check whether we've already done the Wisconsin-specific legwork for you.
    - For solo and small firm attorneys especially, time is probably your most limited resource. Our books are designed to help you get to the Wisconsin-specific answer faster, but I think one of the most underused parts of them is everything beyond the narrative text.
    - Look for the practice tips, checklists, sample language, forms, and procedural guidance. Those are often the pieces you can put to work immediately.
    - And don't assume a book isn't relevant because you don't practice exclusively in that area. If a matter takes you slightly outside your normal lane, that's often when these resources are most valuable. They can give you the Wisconsin-specific foundation you need without spending hours figuring out where to start.
- Hot take is: before you research from zero, check the bookshelf. Someone may have already done a lot of the work for you.

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# Books Unbound (BuB)

**Contact**
Caitlin Gutoski, Product and Publications Manager
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608-250-6113

**Link**
Books Unbound

**Useful Tips**

- Search the library, not just a book
- My tip for Books Unbound is: don't use the digital library like it's just a bookshelf on a screen.
    - The advantage of having these resources digitally is that you don't necessarily need to know which book has your answer before you start.
    - Search across the library for the issue you're dealing with. That can be especially useful for solo and small firm practitioners because real client problems don't always fit neatly into one practice area. A family law matter can suddenly involve an estate issue, a business question can turn into litigation, or you may simply find yourself dealing with something you haven't touched in five years.
    - Instead of trying to become an expert in that entire area, use the library to quickly orient yourself: What am I dealing with? What Wisconsin-specific rules or procedures should I know? And where do I need to dig deeper?
- Hot take: think of Books Unbound as a starting point for the question, not just a digital version of a book you already know you need.

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# Forms

**Contact**
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608-250-6113

**Link**
Online Forms

**Useful Tips**

- Start at 80%, not zero
- My forms tip is probably the easiest one to remember: start at 80%, not zero.
- We have more than 1,250 Wisconsin-specific forms across eight major practice areas, and for a solo or small firm, I think the biggest value is simply not having to recreate routine work.
- Before you open an old client file, search your shared drive, or start drafting a document from a blank page, check whether there's already a Wisconsin-specific form you can use as your starting point. That doesn't mean a form replaces your judgment. It means your judgment gets spent on the 20% that actually requires it: adapting the document to your client, the facts, and the situation in front of you.
- And for paralegals, this can be particularly useful for creating more consistent workflows across the firm.
- Hot take is: don't pay yourself to reinvent documents your practice needs over and over again. Start with the framework, then spend your time customizing what matters.

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# Advocacy

**Contact**
Cale Battles, Director of Public Affairs and Government Relations
cbattles@wisbar.org

**Link**
Government Relations

**Useful Tips**

- The State Bar's Government Relations program connects State Bar members with state government officials--including legislators, executive and judicial branch agencies and their staff--to improve the administration of justice and the delivery of legal services in Wisconsin. The Government Relations team is the lobbying arm of the State Bar and some of its practice sections. It is also responsible for tracking Supreme Court Rules and fostering effective communication and relations with the judicial branch.
- State Bar of Wisconsin Policy Book
    - Policy Fact Sheets
- Advocacy Toolkit
- Legal Advocate Rule Petition Feedback

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# Communications

**Contact**
Joe Forward, Communications Director
Jforward@wisbar.org
608-250-6161

**Link**
News & Publications

**Useful Tips**

- WisconsinLawyer
- Inside Track Weekly
- CaseLaw Express
- WisLawNow

# Social Media

**Contact**
Joe Forward, Communications Director
Jforward@wisbar.org
608-250-6161

**Link**
Social Media

**Useful Tips**

- Wherever you connect, join Wisconsin's legal community! Follow us for entertaining and enlightening stories from State Bar members, trending legal news, practice tips, and more. Lend your voice to the conversation. We want to hear from you!
- Facebook, LinkedIn, Instagram, YouTube, Twitter / X,
- Connect with even more State Bar groups

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# Rural Initiatives

**Contact**
Kim Burns, Member Relations & Engagement Director
kburns@wisbar.org
608-250- 6181

**Link**
Rural Initiatives

**Useful Tips**

- Rural Clerkship Program
  - Expose students to practicing law in rural Wisconsin
  - Connect students with employers offering a limited-term, full-time, paid summer employment position
  - Students (1L and 2L) from Wisconsin and Minnesota law schools are eligible
  - Clerks gain practical legal experience
  - Help bridge the gap in legal services in rural communities
  - Each year 3 attorneys are selected for program
  - Focus on long-term attorney retention
  - Attorney must live and work full time in a rural area
  - Rural area defined by counties with one or fewer attorneys per 1,000 residents

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# Local Bar Support

**Contact**
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608-250- 6181

**Link**
Local Bar Resource Page

**Useful Tips**

- STRONGER LOCAL BARS. STRONGER WISCONSIN.
    - Local insight. Statewide reach.
    - Local bars know their communities. The State Bar adds statewide connections, resources, and visibility.
    - Listen: Identify changing needs and opportunities.
    - Connect: Link leaders, peers, speakers, and resources.
    - Equip: Offer practical tools for programs and operations.
    - Amplify: Share local activities, projects, and successes.
- Leadership & Operations
    - Less time administering. More time engaging members.
    - Help volunteer leaders lead with confidence
    - Practical tools reduce reinvention and make transitions smoother.
    - Officer transition planning
    - Bylaws and articles of incorporation
    - Meeting topics and event ideas
    - Annual checklists and reporting reminders
    - Record retention and insurance considerations
    - Current officer and contact information

# Ready. Set. Practice. Mentoring Program

**Contact**
Karen Beall, Program Coordinator
kbeall@wisbar.org, mentoring@wisbar.org
608-250-6120

**Link**
Ready.Set.Practice. Mentoring Program

**Useful Tips**

- The program matches new lawyers and law students with experienced attorneys. Conversations may cover topics such as client communication, practice management, professional relationships, career planning, leadership, and work-life balance.
- **Mentor eligibility:** Mentors must be attorneys who are actively licensed in Wisconsin and in good standing, have been admitted to practice for at least six years.
- **Mentee eligibility:** The program welcomes law students, lawyers who are just starting their careers, and experienced lawyers seeking guidance as they move into a new practice area.
- The voluntary, year-long program runs from January through December, with meeting times and formats determined by each mentor-mentee pair. Regular check-ins—whether in person, by phone, or virtually—help participants maintain momentum and build a stronger professional connection.
- Online materials and resources are available to help pairs get started and stay on track, including a mentoring handbook, mentor and mentee checklists, an initial meeting guide, and suggested activities and discussion topics.
- By mentoring a lawyer, you can share valuable experience, provide guidance through challenges, and make a lasting impact on their professional growth.
- We are now taking mentor, mentee, and law student sign-ups for the 2027 program year!

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# Sections

**Contacts**

Graeme Gallagher, Section Coordinator
ggallagher@wisbar.org
608-250-6187

Kara Olson, Section Coordinator
kolson@wisbar.org
608-250-6124

**Links**

- Sections Landing Page
- Join sections here
- Check out our Section blogs

**Useful Tips**

- Sections offer attorneys opportunities to deepen their knowledge, connect with colleagues, develop leadership skills, and stay current on legal issues affecting their practice areas.
- Section membership helps attorneys build expertise, expand their professional network, and engage with the legal community.
- Fy25 Overall Section Activity
    - 116 board meetings
    - 33 Section driven CLEs
    - 11 helped with AMC content
    - 3 have Facebook pages
    - 12 participated in Law School engagement
    - 14 partnered with AMC and 4 provided scholarships
    - 6 offered scholarships for CLEs
    - 1 offered law school scholarship
    - 12 are active in legislative work
    - 1 offers free section membership to government attorneys
    - 2 assist pro bono initiatives
    - 1 partners with Marquette Law School to provide Business Assistance
    - 2 held volunteer events with networking

# Divisions

**Contact**
Karen Beall, Program Coordinator
kbeall@wisbar.org
608-250-6120

**Helpful Links:**

- Divisions Landing Page
- Join a Division

**Useful Tips**

- The State Bar offers its members the opportunity to meet and work with other attorneys who share important characteristics through participation in the Bar's four divisions.
- Unlike sections, which focus on specific professional areas or legal issues, divisions are organized under broad categories that reflect the location and experience of Bar members.
- Division members can take advantage of networking events, education programs, representation on the Board of Governors, and communication through elists, social media, and blogs.
- Divisions
    - Government Lawyers Division, 2,700 members
    - Nonresident Lawyers Division, 6,700 members
    - Senior Lawyers Division, 1,700 members
    - Young Lawyers Division, 3,800 members

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# Fee Arbitration

**Contact**
Sarah Watson, Pro Bono & Consumer Protection Program Manager
swatson@wisbar.org, feearb@wisbar.org
608-250-6177

**Link**
Consumer Protection Program

**Useful Tips**

- Exists as an alternative to the court process for lawyers and clients who disagree over legal fees and costs.
- Members as Participants:
    - We see the most applicants from lawyers who charge advance flat fees for legal services and utilize SCR 20:1.5(g) to deposit the funds into their business account, which requires them to submit any unresolved fee disputes to binding arbitration
- Members as Volunteer Arbitrators:
    - We rely on volunteer arbitrators to hear fee disputes, conduct hearings, and issue binding decisions.
    - Program staff performs most of the admin work (organizing applications and scheduling), offers training materials, and occasional program swag!

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# Pro Bono

**Contact**
Sarah Watson, Pro Bono & Consumer Protection Program Manager
swatson@wisbar.org, probono@wisbar.org
608-250-6177

**Link**
Pro Bono Program

**Useful Tips**

- We support members to do pro bono and incorporate it into their practice
- Professional malpractice insurance policy by WILMIC – members are able to register for the policy when they volunteer with qualified pro bono programs
- Expense Reimbursement – members can receive financial assistance with legal expenses for direct pro bono representation cases where the expense is incurred and cannot be paid by the client
- Pro Bono Portal by Paladin – members can find real time volunteer opportunities that are posted by Wisconsin legal aid providers as well as national groups
- Pro Bono Initiative Grants – members can apply for financial assistance to develop or expand legal assistance projects in their communities