

*New York Law Journal*

NEW YORK  
CITY BAR

**13<sup>TH</sup> ANNUAL**

# **SMALL LAW FIRM PRACTICE MANAGEMENT SYMPOSIUM**

**LEARN HOW TO GROW  
YOUR PRACTICE**

**THURSDAY, NOVEMBER 10, 2016**

**8:30 AM - 5:00 PM**

**NEW YORK CITY BAR** 42 West 44th St | Manhattan  
**2 CLE Credits Available**

**[www.nycbar.org](http://www.nycbar.org)**

# EXHIBITORS

## **Animus Rex**

*Websites and Apps for Lawyers*

## **Carr Workplaces**

*Versatile Office Solutions  
(NYC Bar Member Benefit)*

## **Casemaker**

*Legal Research (NYC Bar Member Benefit)*

## **Clio**

*Practice Management Simplified*

## **CosmoLex**

*Your entire law office - on the cloud*

## **Easy Soft**

*Legal Software*

## **Effective Solutions Plus, Inc.**

*Comprehensive Tech Support  
for Small Businesses*

## **FindLaw, Thomson Reuters**

*Websites for Law Firms*

## **How to Manage a Small Law Firm**

*Seasoned Solo Drop-In Center Sponsor*

## **Interstate Filings, LLC**

*Incorporation Services for Law Firms*

## **Law Pay**

*Credit Card Processing for Lawyers*

## **LEAP**

*Law Practice Management Software  
Conference Lunch Sponsor*

## **Mercer**

*NYC Bar Member Insurance*

## **New York City Bar Association**

## **New York Law Journal**

## **Rocket Matter**

*Legal Practice Management and Time  
& Billing Software  
(NYC Bar Member Benefit)*

## **Smokeball**

*Software for Small Firms*

## **Sterling Bank**

*CLE Program Sponsor*

## **Westlaw, Thomson Reuters**

*Legal Solutions Products*

## **Wolter Kluwer's CT Corporation**

*Wine Reception Sponsor*

## **Your Wall Street Office**

*Startup Office, Mail Address  
and Phone Answering Service*

## **ZOLA**

*Practice Resource Planning Application  
for Small Law Firms*

# SCHEDULE

**Check-In and Networking Breakfast 8:30 AM - 9:00 AM**

## PLENARY

### **Moneyball for Lawyers - Managing by the Numbers to get Major League Results**

**9:15 AM - 10:00 AM**

In the hit movie, "Moneyball" the General Manager of a small-budget team adopts a numbers-based approach from a young Yale graduate to try to do more with less. Along the way, he faces ridicule from his board, obstruction from the team manager and general derision. This new way of thinking violates all of the conventional wisdom. Of course, the conventional wisdom makes it clear he just can't compete with the budget he has.

The legal profession has its own conventional wisdom. Yet some small firm owners, including solos, are finding that paying attention to the numbers we will discuss, and adopting a new way of thinking about their businesses, is allowing them to reach major league success.

In this session, we will discuss the six numbers that every law firm stakeholder must know, and the six key reports you should be looking at every month and every week. We will discuss why you're in this business in the first place, and how to use your law firm to achieve your own success, while delivering quality service to your clients.

Speaker: **CHRISTOPHER ANDERSON**, How to Manage a Small Law Firm

## TRACK 1

### **The Basics of Small Firm Startup 10:15 AM - 11:00 AM**

Explore startup office space needs, banking, legal notices and forms, tech needs, websites and online marketing. You'll get helpful information that you'll need to start your own firm.

Moderator: **MARK JOSEPHSON**, Murray & Josephson, CPAs, LLC

Speakers: **ALEX ENGLARD**, Interstate Filings; **LARRY MCELROEN**, Sterling Bank; **STEVE LUBER**, Your Wall Street Office; **MAIRIM VANT**, Effective Solutions Plus

## TRACK 2

### **How to Effectively Grow Your Firm Through Social Media, Online and In the Cloud**

**10:15 AM - 11:00 AM**

Hear from our panel of experts and explore ways to grow your firm effectively through use of website, blogs and cloud-based law practice management tools.

Moderator: **GARY KAUFMAN**, Gary Kaufman PLLC

Speakers: **FRED J. COHEN**, ZOLA; **RICK KABRA**, CosmoLex; **KEVIN O'KEEFE**, LexBlog, Inc.; **TODD RENGEL**, Animus Rex

## PLENARY

### **Entity Choice: Corporations vs. LLCs 11:00 AM - 12:00 PM**

**1 CLE Credit for Professional Practice**

The entity structure you choose for a new business formation has far-reaching consequences. Improve your decision-making with this in-depth seminar that compares and contrasts the characteristics of corporations and limited liability companies as well as the advantages and disadvantages of each.

Learn about these key criteria: Entity characteristics, Taxation, Non-tax advantages, Management, Owners' rights, Duties and liabilities, Operational issues and Doing business in foreign states. Plus, learn best practices for formation, maintenance and dissolution to avoid costly administrative missteps.

Speaker: **LORI ANN FOX**, Wolters Kluwer's CT Corporation

## Networking Lunch and Learn More About NYC Bar Benefits and Resources

**12:15 PM - 1:00 PM**

Join a Networking Group, Mentoring Circle or a Committee to develop lasting relationships, get help with your practice and learn more about your substantive legal area of interest. Find out how to join the NYC Bar's Legal Referral Service to get more clients. Get valuable information about legal research, membership benefits, NYC Bar Virtual Law Firm Program and other programs specifically designed to help solos and small firm practitioners.

Moderator: **ARLENE BEIN**, Senior Director, Membership & Marketing, New York City Bar

Speakers: **JOAN HOGARTH**, Law Office of Joan D. Hogarth; **SHAN THEVER**, Director, Small Law Firm Center, New York City Bar; **JOE TREMITI**, Legal Referral Service Panel Member; **RICHARD TUSKE**, Director, Library Operations, New York City Bar

**PLENARY**

## How to Go Paperless. It's Not as Hard as You Think **1:15 PM - 2:00 PM**

Converting your firm to a paperless operation can seem like an overwhelming challenge. But it's not as complicated as you think. You can start now. In this session, you will learn about the essential systems, tools and workflows of a paperless office, how to automate legal document creation, and how to optimize your use of practice management software in a paperless environment. We'll share the story of a lawyer who took his firm paperless, the process the firm went through and the protocols and conventions they established.

Speaker: **LARRY PORT and TIM BARAN**, Rocket Matter

**PLENARY**

## Unleashing the Power of Casemaker: A One-Hour Live Session **2:00 PM - 3:00 PM** **1 CLE Credit for Practice Management**

City Bar members have free remote access to Casemaker – a comprehensive legal research library. This live program will provide an overview on how to use the Casemaker library to your best advantage. Topics covered include research techniques, resources, saving research results and annotating and organizing research results for incorporation into memoranda or briefs. This live demonstration of Casemaker's latest features will assist lawyers in using the library most effectively, whether they are new to Casemaker or have used it in the past.

Speaker: **REBECCA SKEELES**, Casemaker

**PLENARY**

## Lessons Learned: Small Law Firm Owners' Roundtable **3:15 PM - 4:00 PM**

Panelists will give their unique perspective on major challenges and lessons learned as their practices grew from one person to multi-attorney, multi-jurisdictional operations. We will discuss overcoming the challenge of choosing and maintaining a partnership practice and expanding services and practice areas to grow your business. Audience participation is encouraged as we hope to have a lively discussion of issues of particular interest to audience members.

Moderator: **MIRA WEISS**, Weiss Law Group PLLC, Chair of the Small Law Firm Committee

Speakers: **NEIL GARFINKEL**, Abrams Garfinkel Margolis Bergson, LLP; **CHERYL MOIN**, Hill & Moin, LLP

## Wine Reception and Raffle **4:00 PM - 5:00 PM**

Be sure to visit all exhibitors to enter the raffle for great prizes.

# REGISTRATION

**REGISTER ONLINE**  
[www.nycbar.org](http://www.nycbar.org)

**REGISTER by PHONE**  
Call Customer Service  
212.382.6663

**REGISTER by MAIL**  
New York City Bar  
42 West 44th Street  
New York, NY 10036  
Attn. Small Law Firm Center

## AGENDA AT-A-GLANCE

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PLENARY: Lessons Learned: Small Law Firm Owners' Roundtable

**4:00 PM - 5:00 PM**  
Wine Reception and Raffle

Register on or before September 30, 2016:

\$50 Member       \$85 Non-members\*

Register after September 30, 2016:

\$65 Member       \$100 Non-members\*

Admission includes Exhibit Hall, Workshops, Networking Breakfast, Lunch, Plenary Sessions, and Wine Reception.

Space is limited. No refunds of Symposium registration fees after November 1.

\*For membership information, visit [www.nycbar.org](http://www.nycbar.org) or call 212-382-6665.

### REGISTRANT

Name \_\_\_\_\_

Address \_\_\_\_\_

Tel. \_\_\_\_\_

Email \_\_\_\_\_

Firm \_\_\_\_\_

Law School \_\_\_\_\_

### METHOD OF PAYMENT

Check for \$ \_\_\_\_\_ enclosed.

Please make payable to the **New York City Bar Association**

Charge \$ \_\_\_\_\_ to my

Mastercard       Visa       Amex

If you are paying by credit card, please fax this form to 212.382.6760.

### SEASONED SOLO DROP-IN CENTER

Brainstorm about your practice with your colleagues.