



**Solo/Small Firm Success Strategies:  
Boot Camp & Advanced Skills Training**  
Co-sponsored by the KCBA Solo/Small Firm Section

Friday, October 30, 2009  
Red Lion Hotel, 1415 Fifth Avenue, Third Floor, Seattle

5.50 General and 1.00 Ethics CLE Credits Approved

**Two Tracks: Boot Camp and Advanced Skills Training!**

This program has practical information about how to maximize efficiency, financial gain, professional image and technologies for the solo and small firm practice.

**Featuring National Speaker: Jay Fleischman, Jay Fleischman, Esq.,** Founder, LegalPracticePro.com LLC, Brooklyn, New York

**Plus: What I Wish I'd Known** panel that will save you time and money with their insights and useful tools to creating your vision of a law practice.

**Join us immediately following the CLE for our famous Networking Happy Hour!**

**AGENDA**

- |                |  |
|----------------|--|
| 8:00–8:25am    | <b>Registration and Coffee Service</b>   |
| 8:25-8:30am    | <b>Welcome and Overview</b><br><i>Program Co-Chairs: D. Jill Pugh, Law Office of D. Jill Pugh<br/>W. James Kotlowski, Law Office of W. James Kotlowski</i> |
| 8:30 – 9:30am  | <b>Advanced Skills Training</b><br><b>Choosing Your Ideal Practice/Adding New Concentrations</b><br><i>Karen Summerville, Legal Career Management</i>      |
| <b>OR</b>      |  |
| 8:30–9:30am    | <b>Boot Camp</b><br><b>Choice of Entity/Tax Issues for the Solo/Small Firm</b><br><i>Jason Hanson, Robert A. Underhill P.C.</i>                            |
| 9:30 – 10:30am | <b>Advanced Skills Training</b><br><b>Technology &amp; Your Practice</b><br><i>Tara Roberts, Puget Sound Law<br/>Stacey Romberg, Attorney at Law</i>       |
| <b>OR</b>      |  |
| 9:30–10:30am   | <b>Boot Camp</b><br><b>Business Plans: Get Your Foundation Set</b><br><i>Joseph A. Shaub, Attorney at Law, Counselor &amp; Mediator</i>                    |
| 10:30–10:45am  | <b>Break</b>   |

10:45–11:45am      **Advanced Skills Training**  
**Time Management: You Can't Control Time But You Can Manage Yourself**  
*Barbara Nelson, Successfully Solo*

**OR**

10:45–11:45am      **Boot Camp**  
**The Basics of Client Intake, File Management**  
*Beverly Michaelis, Practice Management Advisor,  
Oregon State Bar*

11:45–1:00pm      **Lunch on your own**

1:00–2:00pm      **Advanced Skills Training**  
**Planning (and Expanding) Your Bankruptcy Practice With Better Communication Through Online Marketing and Social Media Channels**  
*Jay Fleischman, Esq., Founder, LegalPracticePro.com LLC,  
Brooklyn, New York*

**OR**

1:00–2:00pm      **Boot Camp**  
**IOLTA/Trust Accounting: Mastering the Basics**  
*Cheryl Heuett, WSBA auditor*

2:00 – 3:00pm      **Advanced Skills Training**  
**Planning Your Retirement**  
*Mike Long, Attorney and Counselor,  
Oregon Attorney Assistance Program*

**OR**

2:00–3:00pm      **Boot Camp**  
**Ethics: Leaving Your Old Firm, Taking Clients With You?**  
*D. Jill Pugh, Law Office of D. Jill Pugh*

3:00-3:15pm      **Break**

3:15–3:30pm      **PLENARY SESSIONS**  
**Choosing Legal Malpractice Insurance**  
Mainstreet Financial

3:30–4:45pm      **Question & Answer Session: “What I Wish I’d Known ...”**  
*Rebecca Wiess, Attorney at Law*  
*Kimberlee Gunning, Law Office of Kimberlee L. Gunning, PLLC*  
*Tahmina Watson, Watson Immigration Law*  
*Robert D. Butler, The Law Offices of Robert D. Butler*

- Docket Control
- Malpractice Avoidance
- Time Management
- Increasing Office Efficiency
- Business Planning
- Office Financial Management
- Billing & Collections Procedures
- Office Technology
- Communicating with Clients to Improve Lawyer-Client Relationship
- How to Conduct Electronic Legal Research

4:45pm Evaluations and Adjournment

4:45pm **Networking Happy Hour**

*SPONSORED BY: Sterling Bank*

**Join us immediately following the CLE for our famous Networking Happy Hour**  
*Network, Give and Get Referrals Exchange Business Cards Enjoy a Little Camaraderie*

---

---

### **KCBA Registration Form**

\*\*\*\*\*

#### **Solo/Small Firm Success Strategies**

Friday, October 30, 2009; Red Lion Hotel, 1415 Fifth Avenue, 3<sup>rd</sup> Floor, Seattle

**5.50 General and 1.00 Ethics CLE Credits Approved**

#### **5 WAYS TO REGISTER!**

MAIL KCBA CLE, 1200 Fifth Ave., Suite 600, Seattle, WA 98101  
WEB [www.kcba.org/CLE](http://www.kcba.org/CLE)  
CALL CLE Department: 206.267.7004  
FAX 206.267.7099  
EMAIL Complete the following and send to Denise Medlock, [denisem@kcba.org](mailto:denisem@kcba.org)

#### **REGISTRATION FEES**

Materials: KCBA is going **green!** We will be distributing course materials in an electronic format – searchable PDF files that you can download to your computer. You may print the materials and bring them to the program. We will have the following materials available at the program: cover page, PowerPoint presentations, and note pages. Approximately 3 days before the program, you will receive via email a link/instructions on how to download your materials.

Priority Registration received by 5:00pm, October 27

\_\_\_\_\_ \$175 **KCBA Solo/Small Firm Section Members**  
\_\_\_\_\_ \$185 KCBA Members  
\_\_\_\_\_ \$150 Non-Attorney Employees of KCBA Members  
\_\_\_\_\_ \$235 Non-Kcba Member Lawyers\*\*\*  
\_\_\_\_\_ \$180 Not An Attorney/General Public

**Although you may certainly attend any of the sessions, in order for us to set up the meeting rooms appropriately, please indicate which track you will be attending for most of the day:**

\_\_\_\_\_ **Boot Camp**                      \_\_\_\_\_ **Advanced Skills Training**

Registration Fee Received after 5:00pm, October 27

\_\_\_\_\_ \$185 **KCBA Solo/Small Firm Section Members**  
\_\_\_\_\_ \$195 KCBA Members  
\_\_\_\_\_ \$160 Non-Attorney Employees of KCBA Members  
\_\_\_\_\_ \$250 Non-Kcba Member Lawyers\*\*\*  
\_\_\_\_\_ \$195 Not An Attorney/General Public

## Solo/Small Firm Success Strategies

\_\_\_\_\_ State Bar Number

\_\_\_\_\_

Mr./Ms. First Name

\_\_\_\_\_

Last Name

\_\_\_\_\_

Firm/Organization

\_\_\_\_\_

Address

\_\_\_\_\_

City

\_\_\_\_\_

State

\_\_\_\_\_

Zip Code

\_\_\_\_\_

Telephone Number and Email address (confirmation sent via email)

Method of Payment: \_\_\_\_\_ Check Enclosed ( check # \_\_\_\_\_ payable to: KCBA)

Exp. Date: \_\_\_\_\_ VISA or MasterCard or American Express

Card No. \_\_\_\_\_

Name as it appears on card \_\_\_\_\_

Signature \_\_\_\_\_

### Important Notices:

\*\*Please advise KCBA one week in advance of any condition that may impact your participation at the seminar so we may ensure appropriate and comfortable accommodation.

\*\*If you must cancel, tuition will be refunded less \$40, if cancellation is received in writing ([cle@kcba.org](mailto:cle@kcba.org) or fax, 206.267.7099) by October 27, 2009. After this date, no refunds will be permitted, however, substitute attendees are welcome.

\*\*Walk-in registrations are welcome as space permits.

\*\*\*Attorneys: Consider KCBA membership and save at least \$50.00 on the registration fee for this program. Similar savings are offered on all KCBA CLE programs throughout the year, which could add up to savings that will more than cover your annual membership. Cost of membership is only \$190.00 per year. For Associates, the cost is only \$90.00 per year (working and living outside of King County). Visit [www.kcba.org](http://www.kcba.org) to join online or contact the Membership Department at 206.267.7016.