



SMALL FIRMS AND SOLO PRACTITIONERS CONFERENCE

THURSDAY, SEPT. 10, 2020

Live in New Castle County at Delaware State Bar Association

Live webcast in Kent County at Morris James LLP

Live webcast in Sussex County at Tunnell & Raysor

5.3 hours CLE credit including 1.0 hour Enhanced Ethics credit for Delaware and Pennsylvania

ABOUT THE PROGRAM

As practicing attorneys of Small and Solo Firms, you need to run your own professional services firms. This Seminar will help you understand the unique complexities of ethically managing a law firm as a business. Firms seeking to improve efficiency, make better use of available technology, and ultimately improve their revenue and profits should attend. If you hope to hit and exceed your personal and financial goals, you will benefit from this Seminar.

Presented by The Small Firms and Solo Practitioners Section
of the Delaware State Bar Association



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Moderator

Melissa M. Green, Esquire
Linarducci & Butler, P.A.

Program

8:30 a.m. – 9:00 a.m.

Registration Check-in

9:00 a.m. - 10:00 a.m.

Multiple Employer Plans

Multiple employer plans (“MEPs”) are unique arrangements under which multiple employers join forces to participate in a single retirement plan that promises such benefits as streamlined administration, consolidated investment opportunities, and reduced fiduciary liability for adopting employers. We will explore the underpinnings of MEPs from an Internal Revenue Code (“IRC”) and from an Employee Retirement Income Security Act (“ERISA”) perspective and provide useful information in determining whether a MEP would be an appropriate mechanism by which to establish and operate a qualified retirement plan.

Zachary Golen, AIF®

Broad Street Financial, LLC

Paul M. Mitchell, CFP®, CFPS

Financial Planner, MassMutual Greater Philadelphia

Chuck Rolph, JD, MSFS, CFP®, AIF®

*Director, Advanced Consulting Group
Nationwide*

10:00 a.m. – 10:45 a.m.

Attorneys’ Preferred Insurance Program

Join USI Affinity for a seminar to learn about the new Attorneys’ Preferred Insurance Program. This session will discuss how the new program focuses on addressing the most commonly overlooked gaps in coverage and assists to mitigate claims before they arise. This program will provide practical tips to help improve your practice and lessen the possibility of a malpractice claim. The program includes an overview of Professional Liability, claims trends, common pitfalls and gaps in coverage, and risk management solutions.

Mike Mooney, Senior Vice President
*Professional Liability Practice Leader
USI Affinity*

10:45 a.m. – 11:00 a.m.

Break

11:00 a.m. – 12:00 p.m.

Complaints, Malpractice, and Ethics

“An Ounce of Prevention Is Worth a Pound of Cure” in limiting your exposure to client complaints. Defending fee disputes, legal malpractice claims and disciplinary complaints can be personally and economically draining. Although it is impossible to please every client every time, employing simple, prospective strategies to protect your business and your license are well worth the effort. Panelists will highlight common errors made by lawyers that can lead to disgruntled clients and troublesome complaints. Mike Mooney of USI will discuss trends in legal malpractice claims and risk management planning. Dennis Schrader, Chip Slanina and Kathy Vavala will discuss recent cases, best practices, and prevention strategies to help you mitigate against client-generated fee disputes, legal malpractice claims and disciplinary complaints.

Charles Slanina, Esquire

Finger & Slanina, LLC

Kathleen M. Vavala, Esquire

Office of Disciplinary Counsel

Mike Mooney, Senior Vice President

Professional Liability Practice Leader

USI Affinity

Dennis L. Schrader, Esquire

Morris James LLP

12:00 p.m. – 1:00 p.m.

Lunch (provided)

PROGRAM CONTINUED ON NEXT PAGE



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Program

PROGRAM CONTINUED FROM PREVIOUS PAGE

1:00 p.m. – 2:00 p.m.

Scaling Law Firm Growth through Intake Policies & Procedures

Every type of law firm, from new practices to established firms, can benefit from streamlining its client intake. Gain hands-on, reality-based tips on scaling your law firm and making more money by creating a predictable process for every client who walks through your door. Learn how to track every lead and ensure that potential new clients have amazing interactions with your firm by implementing clearly-documented policies and procedures which will allow you and your team to onboard clients easily, every time.

What You'll Learn:

- How to design a systematic process for onboarding new clients.
- Best practice procedures to optimize your law firm.
- Examples of key policies that make intake client-friendly

2:00 p.m. – 2:45 p.m.

An Ongoing Look at Billing Models and Alternative Fee Arrangements for Small Firms

Flat fees make clients happy, hourly fees are all about attorney discipline and contingent fees are like a trip to the casino – all have their place – let's talk! Learn about these three billing methods and discuss some billing "pitfalls" that even clever attorneys make. Join a discussion of the three-party relationship involved with defense work, the responsibilities unique to representing clients when retained by a third entity, and the duties to make that three-party relationship clear to the Defendant/Client.

Denise Del Giorno Nordheimer, Esquire
The Law Offices of Denise D. Nordheimer, Esquire, LLC
 Jennifer M. Mensinger, Esquire
Poole, Mensinger, Cutrona & Ellsworth-Aults
 Miranda Clifton, Esquire
Young & McNelis

2:45 p.m. – 3:00 p.m.

Break

3:00 p.m. – 3:45 p.m.

What I Wish They Taught Me In Law School

Law school is not business school and there is a large "knowledge gap" as you learn to be both a lawyer and a small business owner. Let's discuss some things that are simple, but can be transformative in the growth and successful operation of a law office. I learned it on the street, so you don't have to.

Denise Del Giorno Nordheimer, Esquire
The Law Offices of Denise D. Nordheimer, Esquire, LLC

Jennifer M. Mensinger, Esquire
Poole, Mensinger, Cutrona & Ellsworth-Aults





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Live webcast in Sussex County at Tunnell & Raysor, 30 E. Pine St., Georgetown, DE

THREE WAYS TO REGISTER:

- NEW! Register online at www.dsba.org/cle. Log in and select Live Seminars (DSBA members only).
- Fax this completed form with credit card information to (302) 658-5212
- Mail this completed form with check or credit card information to:
Delaware State Bar Association, 405 N. King St., Suite 100, Wilmington, DE 19801

[REGISTER ONLINE](#)

SMALL FIRMS AND SOLO PRACTITIONERS CONFERENCE | Thursday, Sept. 10, 2020

Please return by Thursday, Sept. 3, 2020 • DSB09102020SMALL

LOCATION:

- Delaware State Bar Association in Wilmington Morris James in Dover Tunnell & Raysor in Georgetown

SELECT REGISTRATION TYPE:

All rates include the CLE Seminar and Material Download

\$250.00 Members and Staff Registering On or Before 9/3/20 \$270.00 Members and Staff Registering After 9/3/20

\$370.00 Non-Members

PA Credit – Add \$15.00 PA ID No. _____

Name: _____ DE ID No.: _____

E-mail: _____

Employer/Firm: _____ Phone: _____

Address: _____

Check/Charge in the amount of \$ _____ enclosed. Please make checks payable to DSBA. MasterCard

Visa Amex Discover Card No.: _____ Exp. Date: _____ Signature

(Required if card purchase): _____

General Information

Return registration form to Delaware State Bar Association, 405 N. King St., Suite 100, Wilmington, Delaware 19801, or by fax to (302) 658-5212. A confirmation will be emailed to the registrant. Please keep a copy of this form as your receipt. **CANCELLATION POLICY:** Registrants may receive a full refund less a \$25 cancellation fee for live seminars, if request is made in writing and received no later than one week prior to the seminar. PA CLE Credit will be reported according to the PA CLE Board rules: www.pacle.org. Unpaid registrants who fail to attend are responsible for the full cost of the live seminar. A registration for a live seminar may be transferred to another attorney. Call DSBA at (302) 658-5279 for more information. Visit www.dsba.org for all seminar policies.

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