

NEW YORK  
CITY BAR

*New York Law Journal*

**One if by Land,  
Two if by Cloud?**  
**Building a Thriving Small  
Law Firm On and Off-line**



**Thursday, November 13, 2014, 8:30 AM - 5:00 PM**

New York City Bar | 42 West 44th Street | New York, NY 10036 | [www.nycbar.org](http://www.nycbar.org)

# EXHIBITORS

## **Carr Workplaces**

*Versatile Office Solutions (NYC Bar Member Benefit)*

## **Casemaker**

*Legal Research (NYC Bar Member Benefit)*

## **Charles Griffin Intelligence**

*Legal and Corporate Investigations  
for Small Law Firms*

## **Citibank**

*Banking for Small Law Firms*

## **Clio**

*Practice Management Simplified*

## **CT**

*Registered Agent, Incorporation and Compliance  
Services for Small Law Firms  
Premium Sponsor - Cocktail Reception Sponsor*

## **Davis Forensic Group, LLC**

*Financial Investigation Support to Small Law Firms*

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

*Comprehensive Tech Support for Small Businesses*

## **Esquire Coaching**

*Empowering Lawyers to Happily Succeed  
in the Business of Law*

## **Findlaw**

*Websites for Law Firms  
Conference Sponsor - Coffee Break Sponsor*

## **Ignite Brand Group, LLC**

*Branding and Logos for Small Firms*

## **Innovate: An Online Marketing Group**

*Websites and Online Marketing*

## **Interstate Filings, LLC**

*Incorporation Services for New Businesses*

## **LawPay**

*Credit Card Processing for Lawyers*

## **LexisNexis**

*Premium Sponsor - Lunch Sponsor*

## **Mercer**

*Professional Liability Insurance  
(NYC Bar Member Benefit)*

## **My Pro Bookkeepers, Inc.**

*Bookkeeping/Accounting Consultants  
for Small Law Firms*

## **New York City Bar Association**

## **New York Law Journal**

## **TriNet Ambrose**

*Outsourced HR*

## **U.S. Small Business Administration**

*Government help for Small Firms*

## **Your 30 Wall Street Office, LLC**

*Startup Office, Phone and Answering Service  
for Small Firms*

## **Thomson Reuters Westlaw**

*Legal Research and Practice Management*

# WORKSHOPS

## 9:00 am - 10 am **PLENARY** Get More Clients!

Being a phenomenal lawyer isn't enough. If you want to have a thriving legal career, you have to become a marketing genius. In this practical and information-packed session, you will learn the number one mistake solo and small firm partners make in running their business. Panelists will teach effective marketing skills and systems that create a rush of clients (and cash flow) to fill your law practice.

**SPEAKERS:** **Ann Jenrette-Thomas, Esq.**, CEO, Esquire Coaching; **Amy Neiman, M.A.** CEO, a simplified life; **Vikram Rajan**, Co-founder, phoneBlogger.net; **Claudia Hernandez**, Innovate Websites – Startup Websites

## 10:15 am - 11 am **TRACK I** Small Firm Startup on a Shoestring Budget

Explore entity choice, startup websites, banking, startup tech, office space needs, legal notices and forms for a newly born law practice. Learn how to obtain a fee free guaranteed loan from the SBA, and how SBA can mentor and help start-ups with business plan development.

**MODERATOR:** **Mark Josephson**, Murray & Josephson, CPA, LLC

**SPEAKERS:** **Alex Englard**, Interstate Filings, LLC — Entity Choice; **Steve Luber**, Your30WallStreetOffice – Cost-Effective Office and Phone options; **Mairim Vant**, Effective Solutions – Cost Effective Startup IT; **Andy Knoll**, Citibank - Banking for Startup Law Firms; **Martha Soffer**, U.S. Small Business Administration

## 10:15 am - 11 am **TRACK II** Growing Your Firm in a Cost-Effective Way

Learn how to make your small practice grow and operate more efficiently, get valuable information on helping clients pay better by using credit cards, marketing with websites, outsourcing HR and bookkeeping services and effective branding.

**MODERATOR:** **Olivera Medenica**, Wahab and Medenica LLC

**SPEAKERS:** **TBD**, Findlaw; **Mark Berkowitz**, Trinet — Outsourced HR; **Erin Kim**, Ignite Brand Group — Branding and Logos for Small Law Firms; **Dan Carnet**, My Pro Bookkeepers, Inc. — Outsourced Bookkeeping

## 11:15 am - 12:00 pm **PLENARY** Legal Accounting

Learn the basics of accounting and how to better manage your funds on accounting principles that every lawyer should know: The basics of accounting for lawyers; How legal accounting differs from regular accounting; Report and reconciliation issues surrounding trust accounts; How to pick and integrate the best accounting tools for your practice; Steps to prepare your tax return for your firm's income.

**MODERATOR/SPEAKER:** **Mark Josephson**, Murray & Josephson, CPA, LLC

**SPEAKERS:** **Joshua Lenon**, Clio

**1:15 pm - 1:45 pm** **PLENARY** **Increasing Your Firm's Business By Utilizing NYC Bar Resources**

Joining 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:** **Alla Roytberg**, Director, Small Law Firm Center, New York City Bar

**SPEAKERS:** **George Wolff**, Director, Legal Referral Service (LRS), New York City Bar; **Arlene Bein**, Director of Membership & Marketing, New York City Bar; **Ronald Mirvis**, Head Librarian, New York City Bar Library; **Jim Corbett**, Casemaker

**2 pm - 3 pm** **PLENARY** **The Art and Science of Managing Client Expectations -  
Interactive Role Play and Panel Discussion**

Managing your client's expectations is critical to sustaining and growing your practice. Do it well and you could build significant goodwill resulting in additional business through referrals or otherwise. Do it poorly and risk unhappy clients and unnecessary stress.

Please join Jonathan Evan Goldberg - a litigation and employment law partner at Vandenberg & Feliu and President of Cherub Improv - and a team of actors for an interactive and improvised role play focused on handling client complaints and managing their expectations. Following, a distinguished panel of small firm owners will explore ways to improve your client communications so that you - and your clients - can sleep easy at night.

**MODERATOR/SPEAKER:** **Olivera Medenica**, Wahab and Medenica LLC

**SPEAKERS:** **Jonathan Evan Goldberg, Esq.**, Vandenberg & Feliu, LLP; Cherub Improv; **Jeffrey A. Margolis**, The Margolis Law Firm

**3:15 pm - 4 pm** **TRACK I** **Worst Case Scenario - The Do's and Don'ts of Case Selection,  
Management and Client Communications**

A panel discussion to highlight best practices, risk management issues and common mistakes lawyers make pertaining to client relations, case selection, effective communication, etc. Learn about malpractice coverage implications and an insurance perspective of ongoing issues facing attorneys in this litigious climate.

**MODERATOR:** **A. Michael Furman**, Furman Kornfield & Brennan LLP

**SPEAKERS:** **Bryan Jordan**, Claims Manager, Zurich; **Sharon Eure Burns**, Assistant VP, Zurich; **Lisa Tankoos**, Senior Underwriter, Zurich; **Izabell Lemkhen**, Furman Kornfeld & Brennan LLP

**3:15 pm - 4 pm** **TRACK II** **Solutions for Building Efficiency and Competitive Edge for Small Firms**

Thomson Reuters, a global legal solutions and technology leader discusses how rising case complexity and the need to do more with less, can create opportunities for small law firms. Learn how incorporating targeted technology solutions can help you complete effectively against larger firms, and get the most out of your practice and your workday.

**SPEAKERS:** **TBD**, Westlaw

# REGISTRATION

**REGISTER:** *online* www.nycbar.org  
*by fax* 212.768.8116  
*by mail* New York City Bar  
42 West 44th Street,  
New York, NY 10036  
Attn. Alla Roytberg

## ADMISSION:

**Register on or before October 1, 2014:**

\$35 Member  \$60 Non-members\*

**Register after October 1, 2014:**

\$50 Member  \$85 Non-members\*

Admission includes exhibition hall, workshops, networking breakfast, lunch, plenary sessions, and wind-down reception with wine, beer and gift raffle.

Space is limited. Please register for Symposium sessions no later than October 30. No refunds of Symposium Registration Fee after November 1.

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

Yes, I'd like to hear more from the exhibitors.  
*I understand that by checking this box, the City Bar will share my name and contact information with the Symposium exhibitors so I can receive information about their products, services, and special offers.*

## REGISTRANT

Name \_\_\_\_\_  
Firm \_\_\_\_\_  
Law School \_\_\_\_\_  
Address \_\_\_\_\_  
Tel. \_\_\_\_\_  
Email \_\_\_\_\_

## METHOD OF PAYMENT

- Check enclosed for \$ \_\_\_\_\_ made payable to the  
**New York City Bar**
- Charge \$ \_\_\_\_\_ to my  
 Mastercard  Visa  Amex

If you are paying by credit card, you may fax this form to 212.768.8116

Account # \_\_\_\_\_  
Expiration Date \_\_\_\_\_  
Cardholder's Name \_\_\_\_\_  
Signature \_\_\_\_\_

# AGENDA

Please indicate all sessions you will be attending:

## TRACK 1

- 8:30 AM - 9 AM  **Networking Breakfast**
- 9 AM - 10 AM  **Plenary Session:** Get More Clients!
- 10:15 AM - 11 AM  **Small Firm Startup on a Shoestring Budget**
- 11:15 AM - 12 PM  **Plenary Session:** Legal Accounting
- 12 PM - 1 PM  **Networking Lunch** *Sponsored by*
- 1:15 PM - 1:45 PM  **Plenary Session:** Increasing Your Firm's Business by Utilizing NYC Bar Resources
- 2 PM - 3 PM  **Plenary Session:** The Art and Science of Managing Client Expectations - Interactive Role Play and Panel Discussion
- 3:15 PM - 4 PM  **Worse Case Scenario: The Do's and Don'ts of Case Selection, Management and Client Communication**
- 4 PM - 5 PM  **Networking Reception** *Sponsored by*

## TRACK II

- 8:30 AM - 9 AM  **Networking Breakfast**
- 9 AM - 10 AM  **Plenary Session:** Get More Clients!
- 10:15 AM - 10:45 AM  **Growing Your Firm in a Cost-Effective Way**
- 11:15 AM - 12 PM  **Plenary Session:** Legal Accounting
- 12 PM - 1 PM  **Networking Lunch** *Sponsored by*
- 1:15 PM - 1:45 PM  **Plenary Session:** Increasing Your Firm's Business by Utilizing NYC Bar Resources
- 2 PM - 3 PM  **Plenary Session:** The Art and Science of Managing Client Expectations - Interactive Role Play and Panel Discussion
- 3:15 PM - 4 PM  **Solutions for Building Efficiency and Competitive Edge for Small Firms**
- 4 PM - 5 PM  **Networking Reception** *Sponsored by*

**"Seasoned Solo" Drop-In Networking Center**  
*Brainstorm about your practice with your colleagues in the "Seasoned Solo" Drop-In Center*