

**New York State Bar Association
2019 Tech Summit**
Continuing Legal Education Program and Expo

9/19/19-9/20/19
Crowne Plaza Times Square | NYC

Agenda | Day One

8:00 a.m. Registration

8:45 a.m. **Welcome and Introduction**

Paul J. Unger, Esq., Program Co-Chair | Affinity Consulting Group | Columbus, OH

Mark A. Berman Esq., Program Co-Chair | Ganfer Shore Leeds & Zauderer LLP | New York, NY

Welcoming Remarks | NYSBA President

Henry M. Greenberg, Esq. | Greenburg Traurig, LLP | Albany, NY

9:00 – 9:50 a.m. **Keynote Address**

Delivering a Data-Driven Client Experience

Data has the power to transform industries. Despite being a potential treasure trove of insights, the legal profession has not leveraged data to drive better decisions. The Legal Trends Report changes all of that. In this talk, learn how lawyers have the opportunity to leverage data and technology to service their clients in a more efficient, effortless fashion. Research that demonstrates the chasm between lawyer and client expectations has the power to transform the delivery of legal services

(1.0 Law Practice Management)

Speaker: Jack Newton | Themis Solutions Inc./Clio | Vancouver, BC

9:50 – 10:10 a.m. Exhibit Hall Break

10:10 – 11:00 a.m. **Cybersecurity and Ethical Pitfalls of Everyday Law Office Computing**

Rule 1.6 requires a lawyer to make “reasonable efforts” to prevent the disclosure of confidential client information. “Reasonable

precautions” must be taken to prevent client information from falling into the wrong hands. In a digital world, the exact meaning of “reasonable precautions” may be subject to debate. However, it’s hard to argue that doing nothing to protect client data would meet the standard. You don’t have to be a security expert or techie to protect yourself and your office. Learn how to cover all the bases of computer, smartphone, tablet, email, wireless and document encryption. Establish best practices in your office and make sure your confidential information remains safe.

(1.0 Ethics)

Panelists: Paul J. Unger, Esq., Program Co-Chair | Affinity Consulting Group | Columbus, OH

Mark A. Berman, Esq., Program Co-Chair | Ganfer Shore Leeds & Zauderer LLP | New York, NY

11:00 – 11:50

The Latest on How Macs, iPhones and iPads Can be Used Effectively in a Law Practice | An Apple a Day Keeps the Lawyer Working Efficiently

Have an iPad but aren’t using its full potential? Bring it with you to this session where you’ll learn the latest tips and tricks for effectively incorporating it into your everyday workflow! Brett Burney, author of the ABA-published book “Macs in Law” (www.macsinlawbook.com) and the popular blog Apps in Law (www.appsinlaw.com), will guide you through how to give stunning presentations on your iPad, how to access & edit Microsoft Word documents, handwrite & type notes, manage your email & calendar, and much more. Brett will tell you the best apps for accomplishing your work and how you can ethically protect the data you’re carrying on your mobile devices.

(1.0 Law Practice Management)

Speaker: Brett Burney, Esq. | Burney Consultants LLC | Chagrin Falls, OH

Cybersecurity – Law Firm Hackers Just Because You're Cyber-Paranoid, Doesn't Mean the Hacker's Aren't Out to Get You!

Law firms are ripe targets for cybercriminals because of the client confidences, personal information and intellectual property they hold as well as their direct and indirect roles in the transfer of funds.

The threats are real, and lawyers and law firms have professional duties to protect themselves and their clients from cybercrime. Come hear this lively panel of experts discuss the threats and how to protect yourself.

(1.0 Law Practice Management)

Panelists: Joseph V. DeMarco, Esq. | DeVore & DeMarco, LLP | New York, NY

John Bandler, Esq. | Bandler Group LLC | New York, NY

Bill McLaughlin, CTO | Atlantic Tomorrow | New York, NY

11:50 – 1:00 p.m. **Luncheon Keynote**

Mega Trends and Cyber Predictions 2020 & Beyond – Perspective for Lawyers and Law Firms

Presentation will focus on technology trends and business influences driving cyber security; and examine new business models and shifts in organizational culture and society that will impact managing risk and enabling business value creation - what to know and what to be ready for.

(1.0 Law Practice Management)

Speaker: Deborah Snyder, MBA, GCIS, GSTRT, CISSP, CRISC, PMP | NYS Chief Information Security Officer | NYS Office of Information Technology Services | Albany, NY

1:00 – 1:50 p.m. **PDF Master Class Power Hour**

If you are committed to paper reduction and learning how to manage a digital file, you must master PDF software. Moving beyond the basics of your PDF software can reap great rewards. In this “tricks” style session, the speaker will teach you the killer legal features of Adobe Acrobat and Nuance PowerPDF, two of the most commonly used PDF solutions in the legal industry.

(1.0 Skills)

Speaker: Paul J. Unger, Esq., Program Co-Chair | Affinity Consulting Group | Columbus, OH

Cyber Insurance Demystified | Necessary, Expensive and Confusing

Law firms in particular are currently under siege from clever cybercriminals on the hunt for a variety of enticing and lucrative data. The often costly consequences of cyberattacks, both financially and to a firm's reputation, are inevitable and in many cases can put a firm out of business. However, you can be prepared with Cyber Liability insurance and social engineering coverage through the New York State Bar Insurance Program with USI Affinity, a representative of whom is on the panel. This panel will address discuss data breach risks and exposures to law firms, what is covered by appropriate insurance as well as the critical steps law firms need to take to ensure proper coverage and what to do after there is a breach as it relates to insurance coverage.

(1.0 Law Practice Management)

Panelists: Marian C. Rice, Esq. | L'Abbate Balkan Colavita & Contini, LLP | Garden City, NY

Mike Mooney | USI Affinity | Philadelphia, PA

Patrick J. Burke, Esq. | Phillips Nizer LLP | New York, NY

1:50 – 2:00 p.m. Break

2:00 -2:50 p.m. **Hey Siri, Hey Alexa . . . Is this Admissible?**

“Hey Siri, play music from ‘My Favorite Songs’ playlist, and erase that comment I made about a bank robbery ...” They’re listening to us, but how much information do personal digital assistants like Siri, Alexa, Cortana, and Google Assistant record and retain? And what duties do parties have to collect and produce this information? It’s only a matter of time before many of us will encounter these questions. This panel will provide you with the details and information you need regarding the privacy, constitutional, authentication, and admissibility considerations involved, though

there may be more questions than answers. Just ask Alexa to add the date to your calendar.

(1.0 Areas of Professional Practice)

Panelists: Brett Burney, Esq. | Burney Consultants LLC |
Chagrin Falls, OH

Hon. Lisa Margaret Smith | Magistrate Judge | United
States District Court for the SDNY | White Plains, NY

Shawndra Jones, Esq. | Epstein Becker & Green,
P.C. | New York, NY

**Microsoft Office 365 | What Your Law Firm needs to Know
When It Comes to Confidentiality and Shared Files**

Office 365 offers a compelling combination of local software, document/email management and cloud services. Even if you already subscribe to Office 365, there are dozens of extra applications that come with it that you could be using. Learn how it works, what it does best, and the different packages available. You'll soon see why Office 365 is rapidly taking over the legal market.

(1.0 Ethics)

Speakers: Paul J. Unger, Esq., Program Co-Chair | Affinity
Consulting Group | Columbus, OH

Dominick Ciacciarelli | Kraft Kennedy | New York, NY

2:50 – 3:15 p.m. Break

3:15 – 4:05 p.m. **How to Start Up or Start Over with Tech . . . in the Cloud and on the Ground**

Getting the right technology for your practice shouldn't be a game of chance. It's too expensive and too important, but how do you avoid mistakes? What are best practices for law office accounting, legal case management, electronic file/document organization and generating complex documents? How do you pick the right computer when it's time to replace what you have? How should

mobile devices factor into your practice? How can you access everything at the office when you're not at the office? What are the best "cloud" services for lawyers? This seminar will answer those questions and more. It provides a complete legal technology roadmap in plain english, covering all areas of law office technology and practice management. Stop letting technology just happen to you and take control! We'll show you how.

(1.0 Skills)

Panelists: Paul J. Unger, Esq., Program Co- Chair | Affinity Consulting Group | Columbus, OH

Sarah E. Gold, Esq. | The Gold Law Firm | Albany, NY

Who's Reading Your Email — Who Owns Your Social Media and Data?

As email has become the primary form of business communication, and people share increasing amounts of information about themselves on social media, the question of ownership of emails created by employees and the purposes for which those emails and their social media can be used, become more and more significant. Courts and administrative agencies including the National Labor Relations Board have weighed in on employees' rights to personal emails created on employers' computers and the extent to, and circumstances under, which employees' social media posts can be used as the basis for adverse employment actions and discipline. This panel will discuss the key takeaways from these decisions and provide tips on creating an effective and defensible corporate social media policy.

(1.0 Areas of Professional Practice)

Panelists: Gail L. Gottehrer, Esq. | Law Office of Gail Gottehrer LLC | Stamford, CT

Ignatius A. Grande, Esq. | Berkeley Research Group | New York, NY

Dauphine A. Dunlap, Esq. | Miller Thomson LLP | Ottawa, ON

Claudine English-Tucci, Esq. | CHUBB | Whitehouse Station, NY

4:10 – 5:00 p.m.

50 Tips, Tricks, Websites & Apps in 50 Minutes

Covering all the latest developments in legal technology. Learn where to go for legal-specific tech help, gadgets and utilities that will help you communicate with your clients better and improve the service you render, tablet and cloud-computing tips, software that can help you explain difficult concepts to clients more effectively, ways you can securely share documents with clients and opposing counsel securely, and more!

(1.0 Law Practice Management)

Panelist: Paul J. Unger, Esq., Program Co-Chair | Affinity Consulting Group | Columbus, OH

5:00 p.m.

Reception | Exhibit Hall Give Away

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8:00 a.m. Registration and Continental Breakfast

9:00 – 9:50 a.m. Opening Plenary

**How to Manage Your Workload in the Age of Digital Chaos –
Time, Task, Email & Digital Detox**

Is technology a servant to you or are you a servant to technology? The average American worker switches tasks on the computer 564 times a day. We are sinking in information overload! This seminar plenary will not only teach you how to manage your daily tasks & email, but you will also learn how manage technology so it is your servant, and not the other way around. Learn to improve communication and how to achieve your personal professional goals. Attend this seminar session and enhance your time management and technology skills to regain control of your crazy inbox and task list.

(1.0 Skills)

Speaker: Paul J. Unger, Esq., Program Co-Chair | Affinity Consulting Group | Columbus, OH

9:50 – 10:10 a.m. Break | Exhibit Hall

10:10 – 11:00 a.m. **Microsoft Outlook Power Hour**

In this session, let us show you there is way more to Outlook than just sending and receiving email. Learn how to maximize the use of Outlook with shortcuts, quick steps, rules, integrated tasks, calendar, contacts, notes, and much, much more.

(1.0 Skills)

Speaker: Paul J. Unger, Esq., Program Co-Chair | Affinity Consulting Group | Columbus, OH

Solutions to eDiscovery Problems | Ethics and Tech

"Do you worry about preserving ESI and avoiding spoliation sanctions? Does the thought of collecting, reviewing, and producing terabytes of data keep you up at night? What if privileged information goes out the door by mistake? And how do I comply with my e-discovery obligations without breaking the bank? This panel will discuss legal and technical approaches to resolving these and other e-discovery issues."

(1.0 Ethics)

Panelists: Shoshanah Bewlay, Esq. | General Counsel | NYS Office of Information Technology Services | Albany, NY

Hon. James C. Francis IV. (Ret) | Distinguished Lecturer | CUNY Law School | Queens, NY

Professor Michael L. Fox | Mount Saint Mary College | Columbia University School of Law | Newburgh, NY

11:00 – 11:10 a.m. Break

11:10 – 12:00 p.m. **Fight the Paper | How to Go Paperless and Stay Paperless!**

Sick of dealing with all of the paper and having case information located in 10 places? Can't find the answers to questions quickly enough? Learn how to organize & manage your digital files and stop maintaining paper files. To really solve this problem, you need the right tools, protocols, a better way to search for files, and an electronic filing system to hold it all. This seminar lays out the roadmap to follow if you want to unbury yourself, from hardware to software to procedures. It's not overly complicated and it's not expensive. Learn how to liberate yourself and your office.

(1.0 Skills)

Speaker: Paul J. Unger, Esq., Program Chair | Affinity Consulting Group | Columbus, OH

How Attorneys and Judges are Addressing New Technologies including Autonomous Vehicles, Biometrics and Blockchain

New technologies seem to appear on an almost daily basis. These technologies have -- and invariably will -- become the subject of litigation. The technologies will also become a focus of discovery and raise questions about admissibility. This session will examine how new technologies might "fit" into existing paradigms of the practice of law

(1.0 Ethics)

Panelists: Gail L. Gottehrer, Esq. | Law Office of Gail Gottehrer LLC | Stamford CT
Ronald J. Hedges, Esq. | Dentons US LLP | New York, NY
Kiriaki Tourikis | JPMorgan Chase & Co. | New York, NY

12:00 – 12:10 p.m. Break

12:10 – 1:00 p.m. **Closing Plenary | Legal Ethics in the Digital Age**

(1.0 Ethics)

Panelist: Pery D. Krinsky, Esq. | Krinsky, PLLC | New York, NY

1:00 p.m. Adjournment