

Starting a Practice in New York

9:00 a.m. – 5:00 p.m.

Friday, May 16, 2014
New York City
– Affinia Manhattan

NYSBACLE

Program Fee Includes Luncheon

www.nysba.org/StartingaPracticeinNY2014

Special Co-Sponsor and
NYSBA Member Rate \$150*



INCLUDES
3.0 ethics credits

Get an overview of what it takes to start your own practice, from choosing a business entity to choosing office space and attracting new clients.

This program will provide practical and useful tips for starting a practice in New York.



NYSBACLE



ELECTRONIC
COURSE
MATERIALS

Course Materials

Electronic Course Materials!
Go to www.nysba.org/ECM
for more information!

AGENDA

8:30 a.m.

Registration

9:00 - 9:10

Welcome and Introduction

9:10 – 10:00

Starting Your Own Law Practice I: Creating Your “Launch Plan”

- Your Business Plan (Yes You Need One)
- Home Office or Rented Space?
- Should You Form a Professional Corporation or LLC?
- Your Office Equipment and Technology
- Your Financial and Operations Plan

Speakers: **Peter Giuliani**, Smock Law Firm Consultants
Cliff Ennico, Esq., Law Offices of Clifford R. Ennico

(1.0 areas of professional practice/law practice management)

10:00 – 10:25

Starting Your Own Law Practice II: Setting Up Your Practice Ethically

- The Five Things Every Solo Law Practice Needs to Avoid Ethical Issues
- Setting Up Your IOLA Account

Speaker: **Cliff Ennico, Esq.**, Law Offices of Clifford R. Ennico

(0.5 ethics)

10:25 – 10:35

Break

10:35 – 11:00

Getting Beyond “Everything That Comes In the Door” What Type of Law Should You Practice? Choosing the Right Legal Specialty (or Specialties) in a Tough Market

- Identifying Practice Areas with Growth Potential
- Doing “What’s Not Being Done”
- Letting the Market Tell You Who You Are
- When the Client, Not the Practice Area, is the “Specialty”

Speakers: **Cliff Ennico, Esq.**, Law Offices of Clifford R. Ennico
Peter Giuliani, Smock Law Firm Consultants

(0.5 areas of professional practice/law practice management)

11:00 – 11:50

Understanding Your Malpractice Insurance Policy Making Sure You Have the Right Amount, and the Right Coverage

- Applying for Coverage: How to Fill Out the Application Form
- Defining Your “Practice Areas” the Right Way
- Do You Need “Prior Acts” Coverage?
- How Much Coverage Do You Need?
- What Do You Do When Someone Threatens To Sue You?

Speaker: **Joe Rivera, Esq.**, Vice President, USI Affinity

(3.0 ethics)

11:50 – 12:15

Box Lunch Distribution

12:15 – 1:05

Maximizing Your Marketing | Turning Basic Business Cards, Letterhead and Websites into Marketing Statements “Marketing Alchemy: Setting New Entities on the Path to Prosperity”

Luncheon Keynote

- Define your target niche
- Crafting marketing messages
- Turn basics – business card, letterhead, etc. – into marketing statements
- Incorporate web resources from the beginning
- Select comfortable marketing activities
- Using social media resources effectively and ethically
- Attorney Advertising and the New York Rules of Professional Conduct

Speakers: **Carol Schiro Greenwald, Ph.D.**, MarketingPartners
Cliff Ennico, Esq., Law Offices of Clifford R. Ennico

(0.5 ethics)

1:05 – 1:10

Break

1:10 – 2:00

Get the Clients and Cases You Want | How to Build a Sophisticated Litigation Practice Outside the Big Firm

- Finding Clients
- Exploiting Your Small Size to Get the Clients and Cases You Want
- Practice and Time Management: Do it Right or Die
- Coordinating With Co-Counsel to Build Your Practice
- Special Pitfalls of Litigation to Avoid

Speaker: John Balestriere, Esq., Balestriere Fariello

(1.0 areas of professional practice/law practice management)

2:00 – 2:50

Managing and Organizing Your Practice

- Finance and Operations Issues
- Technology: Maximizing Efficiency
- Practice Management Software
- Engagement Letters
- Office Policies
- Procedure Memos and Templates
- Emergency Preparedness

Speakers: Marc Natale, Chief of Staff, Balestriere Fariello

John Balestriere, Esq., Balestriere Fariello

(1.0 areas of professional practice/law practice management)

2:50 – 3:00

Break

3:00 – 3:50

Human Resources (HR) Issues for the Solo or Small Law Practice

- When is the Right Time to Hire Your First Associate?
- The True Cost of Hiring Employees
- The Do's and Don'ts of Hiring Paralegals
- Are You a Lawyer or a Manager?
- Legal and Tax Issues for the Attorney-Employer

Speakers: David DePietto, Esq., NexFirm LLC
Carmel Mushin, Esq., RPCK Rastegar Panchal

(1.0 areas of professional practice/law practice management)

3:50 – 4:40

Cutting-Edge Ethical Considerations for the Solo Practitioner

- When You Are "More Than a Lawyer": Conflicts of Interest in the Real World
- Working for Chickens: Investing in Clients and Other Nontraditional Forms of Payment
- What Exactly is the "Practice of Law" and When Is It Unauthorized"?
- Partnering with Nonlawyers: the Do's and Don'ts
- Representing Family Members, Business Partners and Other Multiple Clients
- When Clients Cross State Lines: Doing Legal Work in Jurisdictions Other Than New York
- "Reader, Advisor, Barista, Attorney at Law": Combining a Law Practice with Other Sources of Income

Speakers: Cliff Ennico, Esq., Law Offices of Clifford R. Ennico
Carol Schiro Greenwald, Ph.D., MarketingPartners

(1.0 ethics)

4:40 – 5:00

Question and Answer Panel Discussion – Critical Issues for Solo Practitioners in New York

All Speakers

Program Luncheon Sponsored by:



AFFINITY

Refreshment Breaks Sponsored by:



INFORMATION AND POLICIES


Pre-registration Strongly Advised: You can save money and guarantee your seat and course materials by registering early. Registrations received or postmarked within 10 days of the event, or at the door, are subject to a higher registration fee. Seating is limited in all locations and registrations are taken on a first-come, first-served basis.

Cancellations are easy – full refunds are given: Your full registration fee will be refunded if you give us notice no later than the close of business (4:45 p.m. EST) on the day prior to the date of the program for which you registered. To cancel, write the State Bar Service Center at One Elk Street, Albany, New York 12207; or fax (518) 487-5618; or call (800) 582-2452. If you do not cancel and do not attend the program, access to a complete set of course materials in PDF format will be forwarded to you via e-mail in consideration of the registration fee. Non-registrants may purchase program materials after the final program date.

MCLE Credit: This program is acceptable for MCLE credit in New York and many other MCLE jurisdictions.

Tuition Assistance: New York attorneys may apply for tuition assistance to attend this program based on financial hardship. Any New York attorney who has a genuine financial hardship may apply for tuition assistance for a CLE program by completing a *Tuition Assistance Request Form* and returning it to the CLE Department no later than five working days prior to the program, explaining the basis of his/her hardship. If granted, the attorney will receive tuition assistance, depending on the individual's circumstances. For more details, please contact our State Bar Service Center at (800) 582-2452.

Recording of NYSBA Seminars in any form is strictly prohibited.

 **Accommodations for Persons with Disabilities:** NYSBA welcomes participation by individuals with disabilities. NYSBA is committed to complying with all applicable laws that prohibit discrimination against individuals on the basis of disability in the full and equal enjoyment of its goods, services, programs, activities, facilities, privileges, advantages, or accommodations. To request auxiliary aids or services or if you have any questions regarding accessibility, please contact Cindy O'Brien at (518) 487-5585 or cobrien@nysba.org

7.5 TOTAL CREDITS: 4.5 professional practice; 3.0 ethics

This course has been approved for MCLE credit in New York for all attorneys, including newly admitted (less than 24 months).

This program has also been approved for MCLE credit by the **State Bar of California** and the **Pennsylvania Continuing Legal Education Board** for **4.0** credit hours of substantive law and **2.5** credit hours of ethics. All inquiries regarding MCLE credits may be directed to (518) 487-5606.

This program has been approved by the **Board on Continuing Legal Education of the Supreme Court of New Jersey** for **7.9** hours of total CLE credit. Of these, **3.0** qualify as hours of credit for ethics/professionalism, and **0.0** qualify as hours of credit toward certification in civil trial law, criminal trial law, workers compensation law and/or matrimonial law. This course does not qualify under any of the nine specified new admit areas, in five of which New Jersey attorneys admitted in 2009 or thereafter, in their first full two-year compliance period, must take 15 of their 24 required credit hours (see [BACLE Reg. 201:2](#)).

This course includes 2.0 credit hours for the Continuing Professional Education (CPE) requirements of **New York** and **New Jersey** CPAs. Sponsor numbers: New York: 000026; New Jersey: 20CE00099900.

The New York State Bar Association's Committee on Continuing Legal Education has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the State of New York.

IMPORTANT NOTICE: PARTIAL CREDIT FOR PROGRAM SEGMENTS NOT ALLOWED. Under the New York State Continuing Legal Education Board Regulations and Guidelines, attendees at CLE programs cannot receive MCLE credit for a program segment unless they are present for the entire segment. Persons who arrive late, depart early, or are absent for any portion of the segment will not receive credit for that segment.

STARTING A PRACTICE IN NEW YORK

PROGRAM LOCATION

Friday, May 16, 2014 | 9:00 a.m. to 5:00 p.m. | New York City | ODI04 (live webcast option available)
Affinia Manhattan | 371 Seventh Avenue at 31st Street | New York, NY 10001 | 212-563-1800

PROGRAM DESCRIPTION

Are you considering opening your own firm? Are you a recent law school graduate just starting out? Are you considering leaving your place of employment and starting your own practice? The New York State Bar Association Law Practice Management Committee is pleased to present an MCLE program on Starting a Practice in New York.

This full-day program will provide an overview of what it takes to own your own practice. From choosing a business entity to choosing office space and attracting new clients, this program will provide practical and useful tips for starting a practice in New York.

Focusing on solo practice, this year's program topics include: setting up bank accounts; general accounting information; tax concerns; setting up IOLA accounts; client retainer agreements and intake forms; collecting payments; leaving your old firm; handling referral business; the ethical issues of using the Internet to market your practice; social media considerations; increasing your list of contacts; and much more.

PROGRAM FACULTY

Program Chair:

Clifford R. Ennico, Esq., Law Offices of Clifford R. Ennico, Fairfield, CT

Speakers:

John Balestriere, Esq., Balestriere Fariello

David DePietto, Esq., NexFirm LLC

Peter Giuliani, Smock Law Firm Consultants

Carol Schiro Greenwald, Ph.D., MarketingPartners, Author of *"Build Your Practice the Logical Way: Maximize Your Client Relationships"*

Carmel Mushin, Esq., RPKC Rastegar Panchal

Marc Natale, Chief of Staff, Balestriere Fariello

Joe Rivera, Esq., Vice President, USI Affinity

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1.800.582.2452 | source code **PUB2108** | www.nysba.org/deskbook Use coupon code **CLES2014** when you order online and save 20%*

*Offer expires 30 days after program date.

NOTE: Newly admitted attorneys must attend in person to receive New York MCLE credit

Webcast

Can't Attend in Person?

This program offers a simultaneous live webcast option allowing you to "attend" the program from the convenience of your office.

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NYSBA Law Practice Management

Whether you're a solo practitioner or a managing partner at a national law firm, you'll find law practice management resources to meet your day-to-day practice needs. Checklists, best practices, publications, and continuing legal education programs provide up-to-date information and practical tips to help you better manage your law practice.

Starting a Practice | Managing Your Practice | Protecting Your Practice | Marketing Your Practice
Technology and Your Practice | Selling Your Practice and Retirement | Planning Ahead

www.nysba.org/LPM

Starting a Practice in New York

7.5 MCLE Credits

Friday, May 16, 2014

Affinia Manhattan

Program includes luncheon

www.nysba.org/StartingaPracticeinNY2014

4 WAYS TO REGISTER

Online www.nysba.org/CLE
www.nysba.org/LPM

Call 1.800.582.2452 (U.S. and Canada) or 518.463.3724 in Albany & surrounding area

Mail State Bar Service Center
New York State Bar Association
One Elk Street
Albany, NY 12207

Fax 518.463.5993

Pricing NYSBA members & Co-sponsoring Organization
Members: \$175.00
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*through April 30, 2014

Note Registration fees for live programs increase ten days prior to the program date.

Source Code: CL4183