NEW YORK STATE BAR ASSOCIATION

NYSBA CLE

Thursday, November 14, 2013
9:00 a.m. – 5:00 p.m. Webcast
New York City

Webcast
Can't attend in person? This program is also available via a simultaneous live webcast option.

Newly admitted attorneys (less than twenty-four months) must attend the program in person to receive New York MCLE credit.

7.5 MCLE Credits

INCLUDES 2.0 ethics credits

See inside for more details.

Starting Your Own Practice in New York

Basic Business Skills for Starting and Running a Successful Firm

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$175 Special Co-sponsoring Organization and NYSBA Member Rate includes Networking Luncheon and Keynote Presentation by Carol Schiro Greenwald and Cliff Ennico

NYSBA

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 a CLE 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.

Agenda

8:30 a.m. **Registration**

9:00 – 9:10 a.m. **Welcome and Introduction**

9:10 – 10:00 a.m.
Starting Your Own Law Practice: The Basics
- Your Business Plan (Yes You Need One)
- Choosing a Legal Entity
- Home Office or Rented Space?
- Your Office Equipment and Technology

Panelists: **Peter Giuliani**, Smock Law Firm Consultants
Roberto Cuan, Esq., Cuan & Singh

10:00 – 10:25 a.m.
Attorney Escrow and IOLA – What You Need to Know in New York
Panelists: **Christine Fecko, Esq.**, IOLA
Jay L. Hack, Esq., Gallet Dreyer & Berkey, LLP

10:25 – 10:35 a.m. **Break**

10:35 – 11:25 a.m.
Getting Beyond "Everything That Comes In the Door"
- 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: **Clifford R. Ennico, Esq.**, Law Offices of Clifford R. Ennico
Peter Giuliani, Smock Law Firm Consultants

11:25 – 11:50 a.m.
When There Are No Barriers Between Work and Life
Work-Life Issues and the Solo Practice
Panel Discussion with Audience Participation
- Dealing with Time Pressures and Procrastination
- Dealing with Loneliness, Depression and Frustration
- When There Just Isn't Enough Money Coming In
- Developing a "Support Team" or Virtual Office
- Relationships and the Solo Lawyer
- Lawyers Assistance

Moderator: **Erin K. Flynn, Esq.**, Law Offices of Erin Flynn

11:50 a.m. – 12:15 p.m. **Box Lunch Distribution**

12:15 – 1:05 p.m.
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
- Craft marketing messages that speak to that audience
- 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, *Author of "Build Your Practice the Logical Way: Maximize Your Client Relationships"*
Clifford R. Ennico, Esq., Law Offices of Clifford R. Ennico

1:05 – 1:10 p.m. **Break**

1:10 – 2:00 p.m.
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 G. Balestriere, Esq.**, Balestriere Fariello

2:00 – 2:50 p.m.
Managing and Organizing Your Practice
- Beyond the Solo Practice
- When Should You Hire Your First Associate, Paralegal, or Administrator?
- Human Resource Issues (Payroll, Insurance, General Accounting)
- Technology: Maximizing Efficiency
- Practice Management Software
- Engagement Letters
- Office Policies
- Procedure Memos and Templates
- Emergency Preparedness

Panelists: **Marc Natale**, Balestriere Fariello
Roberto Cuan, Esq., Cuan & Singh, P.C.

2:50 – 3:00 p.m. **Break**

3:00 – 3:50 p.m.
Becoming a "Bathrobe Lawyer": How to Build a Successful Solo Practice Out of a Home Office
- Can You/Should You Work Out of Your Home?
- Setting Up Your Home Office
- Marketing, Managing and Growing Your Home-Based Practice
- Time Management for the Home-Based Lawyer
- Dealing with Temptations, Interruptions and "Sidetracks"
- Legal and Tax Issues for the Home-Based Lawyer

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

3:50 – 4:40 p.m.
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't's
- 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: **Clifford R. Ennico, Esq.**, Law Offices of Clifford R. Ennico
Erin K. Flynn, Esq., Law Offices of Erin Flynn

4:40 – 5:00 p.m.
Question and Answer Panel Discussion – Critical Issues for Solo Practitioners in New York

7.5 MCLE CREDITS: 5.5 Areas of Professional Practice and/or Law Practice Management; 2.0 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 **5.0** credit hours of substantive law and **1.5** 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, 2.0 qualify as hours of credit for ethics/professionalism, and 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 BCLE Reg. 201:2).

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.

Program Faculty

Overall Planning Chair:

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

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

Peter A. Giuliani, Smock Sterling Strategic Management Consultants, Weston, CT

Roberto Cuan, Esq., Cuan & Singh, PC, Teaneck, NJ

Carol Schiro Greenwald, MarketingPartners, Larchmont, NY

John Gerard Balestriere, Esq., Balestriere Fariello, New York, NY

Erin K. Flynn, Esq., Law Office of Erin Flynn, New York, NY

Marc Natale, Balestriere Fariello, New York, NY

Christine M. Fecko, Esq., IOLA Fund of the State of New York, New York, NY

Jay L. Hack, Esq., Gallet Dreyer & Berkey, LLP, New York, NY

This program sold out in May 2012 and May 2013. Based on member feedback, we are bringing it back this fall and moving to a larger venue.

Reviews from the May 2013 program:

"The course was useful to an attorney in practice for over 25 years. New ideas from other experienced attorneys are always useful. This program was not only good for someone looking to start a practice."

"One of the best CLE programs at the NYSBA."

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**.

Group Discounts: Subject to availability and exclusions, group discounts are available to law firms and organizations sending 3 or more employees to any one NYSBA CLE program. Please contact Jane Nielsen, at (518) 487-5586 for more information.

CLE Coupon Plan: For more information on our CLE Coupon Plan offering substantial savings on full-day, live programs, please contact the Registrar's Office at 1.800.582.2452.

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

Not a NYSBA Member?

With NYSBA Membership You Can Do More *WITH* More:

1. Save money with members-only discounts on CLE of more than 30%
2. Stay informed with up-to-date, accurate members-only information and publications
3. Access members-only job and career resources at www.nysba.org/jobs
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Become a NYSBA Member Today! Go to **www.nysba.org/join** or Call **518.487.5577**

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ELECTRONIC COURSE MATERIALS

All program materials will be distributed exclusively online in searchable PDF format, allowing attendees more flexibility in storing this information and allowing you to copy and paste relevant portions of the materials for specific use in your practice. A *CLE NotePad*© (paper) will be provided to all attendees at the live program site. The *CLE NotePad*© includes lined pages for taking notes on each topic, as well as any PowerPoint presentations submitted prior to printing. Traditional printed course books can be ordered at the program site for a discounted price and will be shipped subsequent to the program date.

Special Offer from the NYSBA Bookstore

Save 20% on our featured product

Best Practices in Legal Management: A Comprehensive Guide

- Strategic and Organizational Planning
- Business Development
- Legal Practice Management
- Human Resources
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PN: 4131 / **Member $139** / List $179 / 498 pages

1.800.582.2452 | www.nysba.org/bestpracticesbook

Mention code **CLES2013** and save 20%.*

**Offer expires in 30 days.*

4 WAYS TO REGISTER

Online **www.nysba.org/CLE**

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

Use the order form located next to the address section on back page:

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**
Non-members: $275.00

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

Source Code: CL4136

Program Location

Important Note: If you plan to pre-register within 10 days of the program or register at the door, please call us at **(800) 582-2452** or in Albany and surrounding area, dial **(518) 463-3724**, to verify that the program is not sold out or that the date or location has not been changed. Those who pre-register in advance of the program will automatically be notified of any such changes and will receive a full refund up to the day prior to the program, if they cannot attend and notify us of their cancellation. Please pre-register as early as possible.

Thursday
November 14, 2013
New York City
PC: 0DD54
Webcast

The New Yorker Hotel
481 Eighth Avenue @ 34th Street
New York, NY 10001
212-244-0719

Webcast

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Newly admitted attorneys (less than twenty-four months) must attend the program in person to receive New York MCLE credit.

Register Online www.nysba.org/StartingaPracticeFall2013.

See our Fall 2013 schedule online at www.nysba.org/cle

NEW YORK STATE BAR ASSOCIATION
CONTINUING LEGAL EDUCATION

Registrant note: Is your name and address listed correctly on the mailing label at the right? If not, please contact the State Bar Service Center at 800.582.2452/518.463.3200. If you receive multiple copies of this brochure, please pass them along to colleagues who may be interested in this program.

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Please complete this form and mail it with your payment to:

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

Name _____
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Firm _____

Business Address _____
STREET/SUITE NUMBER/CITY/STATE/ZIP

Telephone (_____) _____

NYSBA CLE *presents*

Starting Your Own Practice in New York

Basic Business Skills for Starting and Running a Successful Firm

www.nysba.org/StartingaPracticeFall2013

7.5 MCLE Credits

INCLUDES
2.0 ethics credits

See inside for more details.

NYSBA

REGISTER EARLY, SAVE MONEY, AND GUARANTEE YOUR SEAT AT THE PROGRAM!!!