

Upcoming LPM Programs of Interest:

**Managing Partners Roundtable:
Emerging Technologies for Law Firms**
Tuesday, April 10, 2018 | 9:00 a.m. - 12:00 p.m.
NYC & Webcast | 3.0 MCLE Credits
www.nysba.org/EmergingTech2018

Attorney Fee Dispute Resolution
Tuesday, April 10, 2018 | 3:00 p.m. - 5:00 p.m.
NYC & Webcast | 2.0 MCLE Credits
www.nysba.org/AFDR2018

Technology in Your Practice
Tuesday, April 17, 2018 | 9:00 a.m. - 5:00 p.m.
NYC & Webcast | 7.0 MCLE Credits
www.nysba.org/TechPractice2018

Starting a Solo Practice in New York
Thursday, May 10, 2018 | 9:00 a.m. - 5:00 p.m.
NYC & Webcast | 7.5 MCLE Credits
www.nysba.org/StartingAPractice2018

Buying and Selling Your Practice
Tuesday, May 15, 2018 | 9:00 a.m. - 11:00 p.m.
NYC & Webcast | 2.0 MCLE Credits
www.nysba.org/BuyingandSelling2018

The Lawyer as Employer
Tuesday, May 15, 2018 | 12:00 p.m. - 2:00 p.m.
NYC & Webcast | 2.0 MCLE Credits
www.nysba.org/LawyerEmployer2018



Join or Renew Your NYSBA Membership and Save


- Save money with members-only discounts on CLE of more than 30%
- Stay informed with up-to-date, accurate members-only information and publications
- Access members-only job and career resources at www.nysba.org/jobs
- Network with the best via exclusive, members-only Section benefits

Learn more | www.nysba.org/join

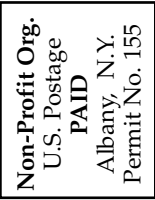
Information and Policies

Cancellations Are Easy: Full refunds are given with notice three days prior to the program date. Registrations cancelled less than three business days from the program date will be assessed a cancellation fee of \$25.00.

Tuition Assistance: Any New York attorney who has a genuine financial hardship may apply for tuition assistance for a CLE program. Learn more at www.nysba.org/TuitionAssistance.

 **Accommodations for Persons 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 cobrien@nysba.org.

www.nysba.org/CLEProgramPolicies



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 | Technology and Your Practice
Marketing Your Practice | Escrow Accounts, IOLA, Ethics | Selling Your Practice and Retirement | Planning Ahead

www.nysba.org/LPM

Starting a Solo Practice in New York

7.5 MCLE Credits

Thursday, May 10, 2018
9:00 a.m. – 5:00 p.m.
NYC & Webcast

Executive Conference Center
1601 Broadway at 48th Street
New York, NY

NYSBA Member: 195
Non-member: \$295
Includes Lunch!

4 WAYS TO REGISTER

Call

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

Mail

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

Fax

518.463.5993
Download an order form online at www.nysba.org/CLEOrderForm

Online

www.nysba.org/CLE
www.nysba.org/StartingAPractice2018

Please Note

• Registrations cancelled less than three days from the program date will be assessed a \$25.00 cancellation fee.

Source Code: CL4701

NEW YORK STATE BAR ASSOCIATION

Starting a Solo Practice in New York

Thursday, May 10, 2018
9:00 a.m. – 5:00 p.m.

NYC & Webcast

Executive Conference Center
1601 Broadway at 48th Street
New York, NY

NYSBACLE

Live Program & Webcast





Topics Include:

Creating a Business Plan • Managing Your Practice • How to Get Clients
How to Build Your Practice • Maximizing Marketing • Risk Management
Malpractice Insurance • HR Issues • Ethical Considerations

Special NYSBA Member Rate: \$195 includes Lunch

Sponsored by the Law Practice Management Committee and the Committee on Continuing Legal Education of the New York State Bar Association



Program Description

Starting up a solo or small firm has its own unique financial, technical and practical concerns, but beginning a practice also has its own set of rewards, fulfillment and accomplishments. To maximize your chances for success, you must have a plan.

This program provides an overview of what it takes to own your own practice. From choosing a business entity to choosing office space and attracting new clients, get practical and useful tips for starting a practice in New York. Focusing on solo practice, 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.

Who Should Attend

Attorneys considering opening their own firm
Recent law school graduates
Attorney considering leaving their place of employment and starting their own practice

Prior Program Reviews

“Extremely valuable seminar with lots of great content!”
“This seminar was so helpful and very informative. I enjoyed it immensely.”
“Great Presenters!”
“All speakers presented excellent concepts and content.”

Program Faculty

Program Chair
Clifford R. Ennico, Esq. | Law Offices of Clifford R. Ennico |Fairfield CT

Speakers
David DePietto | NexFirm LLC | NYC
Clifford R. Ennico, Esq. | Law Offices of Clifford R. Ennico | Fairfield, CT
Gary B. Fiebert | Smock Law Firm Consultants | Roslyn, NY
Dr. Carol Schiro Greenwald | MarketingPartners | NYC
Lana James-Moore | USI Affinity | NYC
Jillian Lee McNeil, Esq. | Balestriere Fariello | NYC
Marc Natale | Balestriere Fariello | NYC
Marian C. Rice, Esq. | L’Abbate Balkan Colavita & Contini, LLP | Garden City, NY



Join the conversation! Follow [@NYSBACLE](#) and [@NYSBALPM](#) on Twitter

Register Today | www.nysba.org/StartingAPractice2018

7.5 MCLE Credits

This course is approved for MCLE credit in New York for all attorneys, including those newly admitted.

New York: 7.5 Total Credits: 3.5 Ethics, 4.0 Areas of Professional Practice, 0.0 Diversity, Inclusion and Elimination of Bias

California and Pennsylvania: 4.0 Substantive Law, 2.5 Ethics

New Jersey: 7.5 Total Credits: 3.5 Ethics/Professionalism, 0.0 towards certification in civil trial law, criminal trial law, workers compensation law and/or matrimonial law

Uniform Certificates of Attendance can be issued for use in other jurisdictions.

The New York State Bar Association 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.

For information about the CLE Rules, visit www.nycourts.gov/attorneys/cle

Program Agenda	
8:30 a.m.	Registration
9:00 – 9:10 a.m.	Welcome and Introduction
9:10 - 10:00 a.m.	Creating Your Launch Plan <ul style="list-style-type: none">• Your Business Plan (Yes, You Need One)• What Type of Law Will You Practice?• Home Office or Rented Space?• Should You Form a Professional Corporation or LLC?• What Equipment and Technology Do You Need?• What are the Five Things Every Solo Law Practice Must Have to Be Successful? Clifford R. Ennico, Esq. Law Offices of Clifford R. Ennico
	Gary B. Fiebert, Esq. Smock Law Firm Consultants <i>(1.0 Areas of Professional Practice)</i>
10:00 – 10:50 a.m.	Managing Your (Cyber) Practice <ul style="list-style-type: none">• Maximizing Efficiency: Hardware/Software/Cloud• Cybersecurity: Preventing and Mitigating Risk• Operational Issues: Data Management• Emergency Preparedness Jillian L. McNeil, Esq. Balestriere Fariello
	Marc M. Natale Balestriere Fariello <i>(1.0 Areas of Professional Practice)</i>
10:50 – 11:00 a.m.	Break
11:00 – 11:50 a.m.	Get the Clients and Cases You Want: How to Build a Sophisticated Litigation Practice Outside the Big Firm <ul style="list-style-type: none">• 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 Jillian L. McNeil, Esq. Balastriere Fariello <i>(1.0 Areas of Professional Practice)</i>
11:50 a.m. – 12:15 p.m.	Lunch Buffet
12:15 – 1:00 p.m.	Maximize Your Marketing: Turn Basic Business Cards, Letterhead and Websites into Marketing Statements <ul style="list-style-type: none">• Define Your Target Niche• Craft Marketing Messages That Speak to That Audience• Turn Basics – Business Card, Letterhead – Into Marketing Statements• Incorporate Web Resources From the Beginning• Select Comfortable Marketing Activities• Use Social Media Resources Effectively and Ethically• Attorney Advertising and the New York Rules of Professional Conduct Clifford R. Ennico, Esq. Law Offices of Clifford R. Ennico
	Carol Schiro Greenwald, Ph.D. MarketingPartners <i>(0.5 Ethics)</i>

1:00 – 1:50 p.m.

1:50 – 2:40 p.m.

2:40 – 2:50 p.m.

2:50 – 3:40 p.m.

3:40 – 4:30 p.m.

4:30 – 5:00 p.m.

5:00 p.m.

Risk Management: Client Intake, Letters of Engagement, Retainers and IOLA, Best Practices for Lawyers

Lana James Moore
USI Affinity

Marian C. Rice, Esq.
L’Abbate Balkan Colavita & Contini, LLP
(1.0 Ethics)

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

- Applying Your 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?

Lana James Moore
USI Affinity

Marian C. Rice, Esq.
L’Abbate Balkan Colavita & Contini, LLP
(1.0 Ethics)

Break

Human Resources Issues for the Solo or Small Practice

- What Types of Staff Members Should You Hire?
- When Is the Best Time to Hire?
- How Can You Create a Competitive Competition Structure You Can Afford?
- What Types of Incentive Programs Can You Put Into Place?
- How Will You Manage Your Team?
- Partner, Employee or Contractor – Which Is Best?
- What Legal and Tax Responsibilities Do You Have as an Employer?
- How Will You Deal with the Affordable Care Act?

David DePietto
NexFirm LLC

Carol Schiro Greenwald, Ph.D.
MarketingPartners
(1.0 Areas of Professional Practice)

Cutting Edge Ethical Considerations for the Solo Practitioner

- What Exactly Is the “Practice of Law” and When Is It “Unauthorized”?
- When Clients Cross State Lines: Doing Legal Work in Jurisdictions Other Than New York
- Current Ethics Opinions You Should Know
- “Reader, Advisor, Barista, Attorney at Law”: Combining a Law Practice with Other Sources of Income
- Can You “Crowdfund” a Law Practice?

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

Carol Schiro Greenwald, Ph.D.
MarketingPartners
(1.0 Ethics)

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

Adjournment