

NEW YORK STATE BAR ASSOCIATION

# TECHNOLOGY SUMMIT

CONTINUING LEGAL EDUCATION  
PROGRAM AND EXPO

9.19.19 - 9.20.19

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**Earn 24 MCLE Credits** | Satisfy Your Biennial NY MCLE Requirement

[www.nysba.org/2019TechSummit](http://www.nysba.org/2019TechSummit)



NEW YORK STATE  
BAR ASSOCIATION

# NEW YORK STATE BAR ASSOCIATION TECHNOLOGY SUMMIT

New York attorneys from many firms and disciplines will come together to address key areas in technology and the law at the New York State Bar Association's inaugural Tech Summit.

Get answers to tech questions and discover ways you can be more efficient and productive in your practice. Gain key practical skills, save time and money, network with your colleagues and improve your practice.

Nationally recognized experts and New York attorneys including members of the NYSBA Committee on Technology and the Legal Profession will come together to explore how new technologies are affecting law firms and client information.

The day-and-a-half long event includes three program tracks providing attendees the information needed to stay abreast of recent technology innovations, legislation and what tech challenges lie ahead.

- Hands-on tech learning
- How new technologies affect the practice of law
- Sponsor/exhibitors presentations on a range of technology topics and applications

## **Satisfy Your Biennial MCLE Requirement**

- The program tracks and sessions will carry skills, law practice management, areas of professional practice and ethics credits
- All breakout sessions and plenaries will be recorded
- Participants will receive access to all the program recordings including two bonus online archives, and in total will receive 24 credit hours, satisfying the NY biennial MCLE requirement

Learn more | [www.nysba.org/2019TechSummit](http://www.nysba.org/2019TechSummit)

Register today and **guarantee your seat at the program** –  
and **satisfy your biennial MCLE requirement** for one low price

# AGENDA

## Agenda | Day 1

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. | Greenberg Traurig, LLP | Albany, NY

9:00 – 9:50 a.m.

### Keynote Address | Jack Newton | Themis Solutions Inc./Clio

#### 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 a.m.

### 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](http://www.macsinlawbook.com)) and the popular blog Apps in Law ([www.appsinlaw.com](http://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 Hackers 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

Harry Srolovitz | Atlantic, Tomorrow's Office | New York, NY



# AGENDA

11:50 – 1:00 p.m.

## **Luncheon Keynote – Deborah Snyder**

### **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 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 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 G. 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**

# AGENDA

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 questions 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 | Toronto, 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 of 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)*

Panelists:

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

5:00 p.m.

**Reception** | Exhibit Hall Give Away

## **Agenda | Day 2**

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 to 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

# AGENDA

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 Areas of Professional Practice)*

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, Esq. | JP Morgan 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**

The program concludes with our experts gathering together to answer the most frequently asked questions and to summarize the top tips on cybersecurity, tech advice, websites, apps, practice management advice, and more! Don't miss this supercharged summary of the best ideas from throughout the summit!

*(1.0 Ethics)*

Panelist:

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

1:00 p.m.

## **Adjournment**

# EXHIBITOR SPEAKING TRACKS

## Day One | September 19

10:10 a.m. – 11:00 a.m.



### **WANTED: A Practical Contingency Plan for a SaaS Provider's Demise**

What is more important for your client, being first to market or fast to market? This is a critical question for decision makers when it comes to outsourcing business-critical software to a small, possibly unproven SaaS company. Technology is constantly changing and risk of partnering with the "safest" provider needs to be weighed against technology advances. Learn how to help your clients mitigate risk with a Business Contingency Plan geared for SaaS that's practical for both the subscriber and provider.

Jonathan Chisholm | Manager of Strategic Partnerships | Iron Mountain

11:00 a.m. – 11:50 a.m.



### **How Technology Can Help You Deliver an Exceptional Client Experience**

A commitment to your client won't go out of style, like the old school ways some attorneys still advertise, bill, and onboard will. Join Tom West, Chief Growth Officer at LawPay, to learn how new school attorneys leverage technology to provide efficient services that retain clients and improve their overall experience with your law firm.

Tom West | CEO | LawPay

1:00 p.m. – 1:50 p.m.



### **Shared Speaking Track**

#### **How to Virtually Win and Work a Case from Start to Finish**

Smith.ai is a superior virtual receptionist service for live calls and web chat. Our AI-backed, U.S.-based receptionists help solo and small-firm attorneys capture and qualify leads, respond to clients, schedule appointments, and collect payments. Our CRM, calendar, and billing integrations, plus free spam blocking, result in fewer interruptions and chores, for a more productive and professional firm. Attorneys who use Smith.ai report more qualified leads, greater client satisfaction, boosted marketing results, and improved work/life balance.

Get a 10-call/5-chat free trial at <https://smith.ai> — and use code NYSBA50 for \$50 off your first month of calls or chats!

Maddy Martin | Head of Growth and Education | Smith.ai



#### **How to Virtually Win and Work a Case from Start to Finish**

Documate



#### **How to Virtually Win and Work a Case from Start to Finish**

LAWCLERK

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**\$795 NYSBA Members | \$1195 Non-Members**

**\$750 Special Co-sponsoring Section Member Rate through August 31, 2019.**

**Earn all 24 credits.** All breakout sessions and plenaries will be recorded.  
Each registrant will receive access to the online archives including two bonus tracks.

Continental breakfasts, a lunch buffet and cocktail reception are included.

Register Online | [www.nysba.org/2019TechSummit](http://www.nysba.org/2019TechSummit)

# ANNUAL MEETING

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Please Join Us

**JANUARY 27 – 31, 2020**

NEW YORK CITY

**[nysba.org/am2020](https://nysba.org/am2020)**



NEW YORK STATE  
BAR ASSOCIATION

# NEW YORK STATE BAR ASSOCIATION

## REGISTRATION FORM

Name \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone ( \_\_\_\_\_ ) \_\_\_\_\_ Fax ( \_\_\_\_\_ ) \_\_\_\_\_

Email \_\_\_\_\_

Days Attending \_\_\_\_\_

## ATTORNEY REGISTRATION

☐ \$795 NYSBA Member

☐ \$1195 Non-NYSBA Member

12.0 MCLE Credits\* (plus 12 Credits online, on demand) Earn 24 credits total\* (including 4.0 ethics credits and 1.0 credit in diversity, inclusion and elimination of bias).

\*All breakout sessions will be recorded. Registrants will receive access to the recorded sessions and two bonus tracks. View the sessions you miss, online, on demand and satisfy your MCLE requirement.

This program has also been approved for MCLE credit by the State Bar of California, the Pennsylvania Continuing Legal Education Board and the Board of Continuing Legal Education of the State of New Jersey. If you require MCLE credit in other states, we can provide you a Uniform MCLE Form.

## PAYMENT INFORMATION

☐ Check or money order enclosed in the amount of \$ \_\_\_\_\_

(Make checks payable to New York State Bar Association.)

☐ Charge \$ \_\_\_\_\_ to ☐ American Express ☐ Discover

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## 2019 Technology Summit

September 19-20

Crowne Plaza Times Square

1605 Broadway

New York, NY 10019

### Rooms for September 18 & 19, 2019

#### Single/Double rate of \$349

Make reservations at **1-888-233-9527** and mention the NYSBA Tech Summit Room Block or use the reservation website **<https://book.passkey.com/go/AS9>**. The cutoff date is Thursday, August 29, 2019.

### INFORMATION AND POLICIES

**This program is transitional and suitable for both newly admitted and experienced attorneys.**

**Cancellations:** Registrations cancelled less than 10 days before the program will be assessed a \$200 cancellation fee as materials will be distributed online to registrants. No refunds after September 10, 2019. A credit can be offered towards another program.

**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](http://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](mailto:cobrien@nysba.org).

**[www.nysba.org/CLEProgramPolicies](http://www.nysba.org/CLEProgramPolicies)**

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