

Starting a Solo Practice in New York

Basic Business Skills for Starting and Running a Successful Practice

NYSBACLE

Webcast

Simultaneous live webcast option allows you to "attend" the program from the convenience of your office.

Thursday, May 14, 2015
9:00 a.m. – 5:00 p.m.

New York City
Executive Conference Center
1601 Broadway at 48th Street



includes
4.0 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.

\$175* NYSBA Member and Co-Sponsoring Organization Rate

Program Fee Includes Lunch

www.nysba.org/StartingaPracticeinNY2015



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



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 firm? The New York State Bar Association Law Practice Management Committee is pleased to present a spring 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.

Program Fee Includes Buffet Lunch Sponsored by USI Affinity

PROGRAM CO-SPONSORS

- Albany County Bar Association

Amistad Long Island Black Bar Association

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Association of Black Women Attorneys

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Torts, Insurance and Compensation Law Section

Trial Lawyers Section

Trusts and Estates Law Section

Young Lawyers Section

Committee on Continuing Legal Education

Committee on Lawyers in Transition

Lawyer Assistance Committee

Law Practice Management Committee

8.0 TOTAL CREDITS: 4.0 Professional Practice; 4.0 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 **3.5** credit hours of substantive law and **3.0** 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 **8.0** hours of total CLE credit. Of these, **4.0** qualify as hours of credit for ethics/professionalism, and **4.0** 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.

AGENDA

8:30 a.m.	Registration
9:00 – 9:10	Welcome and Introduction
9:10 – 10:00	<div>Creating Your “Launch Plan”<ul style="list-style-type: none">Your Business Plan (Yes You Need One)Home Office or Rented Space?Should You Form a Professional Corporation or LLC?Your Office Equipment and TechnologyYour Financial and Operations PlanGetting Beyond “Everything That Comes In the Door”Identifying Practice Areas with Growth PotentialDoing “What’s Not Being Done”Letting the Market Tell You Who You AreWhen the Client, Not the Practice Area, is the “Specialty”</div> <div>Speakers: Peter Giuliani, Smock Law Firm Consultants Cliff Ennico, Esq., Law Offices of Clifford R. Ennico <i>(1.0 areas of professional practice/law practice management)</i></div>
10:00 – 10:50	<div>Risk Management Client Intake, Letters of Engagement, Retainers, and IOLA Best Practices for Lawyers</div> <div>Speakers: Marian C. Rice, Esq., L’Abbate Balkan Colavita & Contini, LLP, Garden City, NY Joe Rivera, USI Affinity <i>(1.0 ethics)</i></div>
11:00 – 11:50	<div>Understanding Your Malpractice Insurance Policy Making Sure You Have the Right Amount, and the Right Coverage</div> <div><ul style="list-style-type: none">Applying for Coverage: How to Fill Out the Application FormDefining Your “Practice Areas” the Right WayDo You Need “Prior Acts” Coverage?How Much Coverage Do You Need?What Do You Do When Someone Threatens To Sue You?</div> <div>Speakers: Marian C. Rice, Esq., L’Abbate Balkan Colavita & Contini, LLP, Garden City, NY Joe Rivera, USI Affinity <i>(1.0 ethics)</i></div>
11:50 – 12:15 p.m.	<div>Lunch Buffet Sponsored By</div> <div></div>
12:15 – 1:05	<div>Maximizing Your Marketing Turning Basic Business Cards, Letterhead and Websites into Marketing Statements and Ethical Considerations</div> <div><ul style="list-style-type: none">Define your target nicheCraft marketing messages that speak to that audienceTurn basics – business card, letterhead, etc. – into marketing statementsIncorporate web resources from the beginningSelect comfortable marketing activitiesUsing social media resources effectively and ethicallyAttorney Advertising and the New York Rules of Professional Conduct</div> <div>Speakers: Carol Schiro Greenwald, Ph.D., Greenwald Consulting Author of “Build Your Practice the Logical Way: Maximize Your Client Relationships” Cliff Ennico, Esq., Law Offices of Clifford R. Ennico <i>(1.0 ethics)</i></div>
1:05 – 1:10	Break
1:10 – 2:00	<div>Get the Clients and Cases You Want How to Build a Sophisticated Litigation Practice Outside the Big Firm</div> <div><ul style="list-style-type: none">Finding ClientsExploiting Your Small Size to Get the Clients and Cases You WantPractice and Time Management: Do it Right or DieCoordinating With Co-Counsel to Build Your PracticeSpecial Pitfalls of Litigation to Avoid</div> <div>Speaker: John Balestriere, Esq., Balestriere Fariello <i>(1.0 areas of professional practice/law practice management)</i></div>


AGENDA

2:00 – 2:50	<div>Managing and Organizing Your Practice<ul style="list-style-type: none">Finance and Operations IssuesTechnology: Maximizing EfficiencyPractice Management SoftwareOffice PoliciesProcedure Memos and TemplatesEmergency Preparedness</div> <div>Speakers: Marc Natale, Chief of Staff, Balestriere Fariello John Balestriere, Esq., Balestriere Fariello John R. McCarron, Jr., Esq. <i>(1.0 areas of professional practice/law practice management)</i></div>
2:50 – 3:00	Break
3:00 – 3:50	<div>Human Resources (HR) Issues for the Solo or Small Law Practice</div> <div><ul style="list-style-type: none">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 Program Can You Put in 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?</div> <div>Speakers: David DePietto, NexFirm LLC Carmel J. Mushin, Esq., RPCK Rastegar Panchal <i>(1.0 areas of professional practice/law practice management)</i></div>
3:50 – 4:40	<div>Cutting-Edge Ethical Considerations for the Solo Practitioner</div> <div><ul style="list-style-type: none">When You Are “More Than a Lawyer”: Conflicts of Interest in the Real WorldWorking for Chickens: Investing in Clients and Other Nontraditional Forms of PaymentWhat Exactly is the “Practice of Law” and When Is It “Unauthorized”?Partnering with Nonlawyers: The Do’s and Don’tsRepresenting Family Members, Business Partners and Other Multiple ClientsWhen 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 IncomeUsing a “Virtual Office” for Your Practice</div> <div>Speakers: Cliff Ennico, Esq., Law Offices of Clifford R. Ennico Carol Schiro Greenwald, Ph.D., Greenwald Consulting <i>(1.0 ethics)</i></div>
4:40 – 5:00	Question and Answer Panel Discussion – Critical Issues for Solo Practitioners in New York
5:00 p.m.	Adjournment

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PROGRAM LOCATIONS

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Thursday, May 14, 2015 | PC: 0DW94

9:00 a.m. – 5:00 p.m.

New York City

Executive Conference Center

1601 Broadway at 48th Street

New York, NY 10019

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

Program Luncheon Sponsored by:



AFFINITY

PROGRAM FACULTY

Overall Planning Chair: **Clifford R. Ennico, Esq.**, Law Offices of Clifford R. Ennico, Member, NYSBA Law Practice Management Committee

Program Faculty: **Peter A. Giuliani**, Smock Law Firm Consultants, Westin, CT * **Marian C. Rice, Esq.**, L'Abbate Balkan Colavita & Contini, LLP * **Joe Rivera**, USI Affinity * **John G. Balestriere, Esq.**, Balestriere Fariello, New York, NY * **Carol Schiro Greenwald, Ph.D.**, Greenwald Consulting * **Marc Natale**, Chief of Staff, Balestriere Fariello * **John R. McCarron, Jr., Esq.** * **David DePietto**, NexFirm LLC * **Carmel J. Mushin, Esq.**, RPCK Rastegar Panchal

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 (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.

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

www.nysba.org/LPM

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Includes 4.0 Ethics Credits
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4 WAYS TO REGISTER

Online www.nysba.org/CLE

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

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

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

Fax **518.463.5993**

Pricing **NYSBA members: \$175.00***
Non-members: \$275.00*

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

Source Code: CL4258