MAY 14-15, 2015

vba solo & small firm Conference

Basin Harbor Club, Vergennes

Entertaining by Vermont based indie-folk duo The DuPont Brothers

Vermont beer & wine tasting

Yoga with Samara Anderson

The Solo and Small Firm Conference is all about the great people you meet and the programming designed by and for solo and small firm lawyers. Sign up now for the conference where you will have an opportunity to share practice tips, develop friendships, and build your referral network. Get energized and stay on top of the latest developments in the law, technology, ethics, managing your practice, and more.

11 MCLE Credits (including 1.5 hours ethics credits)
Personally inspiring for me to focus on law as a business & think about ways I can be more productive...& be a better leader.

Join us for the 6th VBA Solo and Small Firm Conference, May 14-15, at the Basin Harbor Club in Vergennes. The program this year features 11 hours of MCLE credit, incl.1.5 ethics. Programs will address topics such as starting your own practice, managing your practice effectively and efficiently, the latest in law firm technology, ethics, & health of the small or solo firm attorneys. Joining us are nationally known speakers Susan Cartier Liebel, Founder & CEO of Solo Practice University; Jared Correia, practice management expert & Assistant Director at LOMAP in Massachusetts; and practice management consultant Dustin Cole. Also joining us are: Arthur Greene of Arthur Greene Consulting; Wendelyn Duquette, Founder of Quick$tart, LLC; John O’Brien with Attorneys in Balance; and Rebecca Skeeles from Casemaker. Programs will examine specific practice topics as well as broader questions about the future of the legal profession and of small firm practice in Vermont.

We’ve added a VT beer & wine tasting at Thursday evening’s reception with live music from The DuPont Brothers, & Friday morning yoga with attorney/yoga instructor, Samara Anderson. There’s a full range of sponsors with products you can use and loads of opportunities to network with fellow practitioners and our speakers in a relaxed and comfortable environment. Bring your family and take advantage of all the Basin Harbor Club has to offer, including golf, hiking, and boating – or just kicking back and enjoying the scenery.

The VBA Solo & Small Firm Conference is designed as a relaxing opportunity to learn & network. Dress throughout the two-day event is casual. Come, relax, enjoy, & reinvigorate your professional life! The VBA Solo & Small Firm Conference is much more than a CLE program—it’s a unique event that you simply have to experience for yourself. When you do, you won’t want to miss it again. Don’t miss out! Sign up today!!

Here’s what attendees at our 2013 Solo & Small Firm Conference had to say!

The most practical, friendly CLE I have ever attended!

The conference helped fill in my action plan!

This event had the most practical & useful knowledge so far

This is a great event at an exceptional venue...I am a regular & intend to remain so.

I was able to meet just the right contacts through the presenters & exhibitors to take my business further.

Personally inspiring for me to focus on law as a business & think about ways I can be more productive...& be a better leader.

The food was excellent!
SPECIAL THANKS TO **ALPS**—OUR CONFERENCE CO-SPONSOR
AND THANK YOU TO ALL OF OUR 2015 SPONSORS!

**SILVER SPONSORS:**

- B & F Financial Analytics, Inc.
- Casemaker
- Exchange Authority, LLC
- Pinnacle Financial

**BRONZE SPONSORS:**

- Arthur G. Greene Law Firm Consulting
- Quick$tart, LLC
- A.R. Totten & Associates
- Vermont Attorneys Title Corporation
- Technology Consultants, Inc.
- PracBuilder

**AGENDA**

**THURSDAY, MAY 14, 2015**

**11:00am Registration and Lunch-To-Go!**

**12:00—1:00 Lunch Plenary**

1) Building the 21st Century Solo/Small Firm Practice or This is What I’d Do If I Was Building My Practice Today

**1:10—2:40 Concurrent Sessions**

2a) Views from the Bench

2b) Building a 21st Century Solo/Small Firm Practice: A Follow-up Conversation

2c) Should I? Getting It Right with Client Selection

2d) Stress Management for Attorneys

**2:40—3:00 BREAK WITH OUR SPONSORS!**

**3:00—4:30 Concurrent Sessions**

3a) Coping with Student Loans

3b) The Good, the Bad, & the Ugly of Web, Social Media & Advertising

3c) Tax Savings for Small Law Firms

3d) Balanced Living for Attorneys: A Primer

**5:00—7:30 Reception and Dinner**

VT Beer and Wine Tasting

Music by **The DuPont Brothers**

(must be registered to attend)
AGENDA
FRIDAY, May 15, 2015
7:00am—Morning Wake-Up Yoga with Samara Anderson
7:30am—9:30am Breakfast and Registration

9:00—10:30 Concurrent Sessions

4a) Starting Your Own Firm
4b) Balancing Budgets: You Don’t Have To Spend a Lot of Money for that Law Firm
4c) Ethical Traps for Solos & Small Firms
4d) Financial Aspects of Succession Planning: Valuing a Law Practice

10:30—11:00 BREAK WITH OUR SPONSORS!

11:00—12:30 Concurrent Sessions

5a) Making It Work: Tips from Those Who’ve Done It
5b) Unleashing the Power of Casemaker
5c) Six Principles for Increasing Efficiency, Quality, and Client Services
5d) Hey You, Get Off of My Cloud (And Out of My Data)

12:30—12:45 BREAK WITH OUR SPONSORS!

12:45—1:45 Lunch Plenary

6) Big Enough Data: Analytics in the Small Law Firm Environment

1:45—2:00 BREAK WITH OUR SPONSORS!

2:00—3:30 Concurrent Sessions

7a) Unleashing the Power of Casemaker: Advanced
7b) Office Accounting: Take Control of Your Finances to Take Control of Your Practice
7c) Don’t Shut the Doors: Transition Your Practice to the Next Generation
7d) Tax Issues You’ll Face in Your Solo or Small Firm Practice

3:30—3:45 BREAK WITH OUR SPONSORS!

3:45—5:15 Concurrent Sessions

8a) The Un-Program
8b) The Shoeless Cobbler: When It Comes to Employment Law Compliance, Law Firms Can Be Their Own Worst Client
8c) All About the Benjamins: Fee Rules in Veterans Disability Cases
**Thursday, May 14, 2015**

### 11:30 am Registration and Lunch Pick Up

### 12:00—1:00 Lunch  Plenary Session

1) Building the 21st Century Solo or Small Firm Practice or This Is What I'd Do If I Was Building My Practice Today  
Speaker: Susan Cartier Liebel, Solo Practice University

The legal services industry will change more in the next two decades than in the last 200 years. So how do you build a solo/small firm practice in the 21st century? Join Founder & CEO of Solo Practice University, Susan Cartier Liebel, for this detailed look at how to build a client-centric practice from top to bottom. Who are your potential clients? How do you control the message they receive about your practice? How do you employ social media & your website to communicate with these prospective clients? What technologies must you be familiar with? How do you maximize your time, meet your professional obligations, meet the obligations of your business? What about security & portability? What tools are used today that will help you fulfill your obligations to your clients & your business? Learn the answers to these questions & more in this exciting, stimulating, & provocative presentation by one of the thought leaders in solo & small firm practice.

### 1:10—2:40 Concurrent Sessions

<table>
<thead>
<tr>
<th>2a) Views From the Bench</th>
<th>2b) Building a 21st Century Solo or Small Firm Practice: A Follow-up Conversation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speakers: Hon. Jeff Kilgore, Hon. Martin Maley, Hon. Helen M. Toor, Hon. Tom Walsh</td>
<td>Speaker: Susan Cartier Liebel, Solo Practice University</td>
</tr>
<tr>
<td>A panel of Vermont judges offers tips on working in Vermont courts. What do you need to keep in mind? How should you (and your clients) behave? How should you relate to court staff? What sorts of expectations do judges have in different courts (probate, civil, criminal, environmental)? How can you be the best possible advocate for your client? If you practice in Vermont courts, or plan to do so, this session is for you.</td>
<td>Join our keynote speaker for a follow-up session where she will explore the topics covered in greater detail. Bring your questions about building YOUR 21st century solo or small firm practice.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2c) Should I? Getting It Right with Client Selection</th>
<th>2d) Stress Management for Attorneys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speaker: Mark Bassingthwaighte, ALPS</td>
<td>Speaker: John O’Brien, Attorneys in Balance</td>
</tr>
<tr>
<td>Attorneys continue to find themselves involved with “problem clients” for any number of reasons. This program asks the question why and shares practical advice as to how an attorney can avoid such clients in the future. While this program is designed around client selection and the intake process, much of the program will focus on client management skills and client communication.</td>
<td>Many attorneys are unaware of how stress is impacting them in their personal and professional lives. What do most attorneys find stressful? What are the effects of stress? How can you combat them? This program will help you learn both the sources of stress in your job as well as effective ways to manage them.</td>
</tr>
</tbody>
</table>

### 2:40—3:00pm Break with Sponsors
### Thursday, May 14, 2015 Continued

#### 3:00—4:30 Concurrent Sessions

<table>
<thead>
<tr>
<th>Session</th>
<th>Title</th>
<th>Speaker(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3a)</td>
<td>Coping with Student Loans</td>
<td>Joshua Cohen</td>
</tr>
<tr>
<td></td>
<td>Student loans are a burden, but they don't have to be. This session is a practical guide covering all options for federal and private student loans. We'll discuss repayment plans, forgiveness programs, and other ideas to survive your student loan debt. Want to sleep better? You will after this session.</td>
<td></td>
</tr>
<tr>
<td>3b)</td>
<td>The Good, the Bad &amp; the Ugly of the Web, Social Media, &amp; Advertising</td>
<td>Dustin Cole</td>
</tr>
<tr>
<td></td>
<td>If you're not doing the basics of web presence, you're losing money. Prospects – even referred ones – today look at your website first before calling. But what’s important? Where are the risks? How can you increase your web and general visibility without becoming a geek? This program will help you make decisions on what to do, and help you do it.</td>
<td></td>
</tr>
<tr>
<td>3c)</td>
<td>Tax Savings for Small Law Firms</td>
<td>John Cole</td>
</tr>
<tr>
<td></td>
<td>Are there tax savings available to your firm? Can you structure your business in a way that reduces your tax burden? Yes! This program will explore ways to structure your practice to avoid unnecessary payroll taxes, benefits for your employees that can save you payroll taxes, and ways of customizing retirement savings vehicles to your specific practice and personnel.</td>
<td></td>
</tr>
<tr>
<td>3d)</td>
<td>Balanced Living for Attorneys: A Primer</td>
<td>John O'Brien, Attorneys in Balance</td>
</tr>
<tr>
<td></td>
<td>This program will familiarize participants with the many ways that the lives of attorneys can fall out of balance. The presenter will discuss values-based living and allow participants the chance to consider how consistent their lives are with their own values. Participants will leave this seminar with strategies that can help to rebalance their lives effectively.</td>
<td></td>
</tr>
</tbody>
</table>

---

### Friday, May 15, 2015

#### 7:00 Morning Wake-up Yoga with Samara Anderson

#### 7:30 - 9:30 Breakfast & Registration

#### 9:00—10:30 Concurrent Sessions

<table>
<thead>
<tr>
<th>Session</th>
<th>Title</th>
<th>Speaker(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>4a)</td>
<td>Starting Your Own Firm</td>
<td>Caryn Waxman, David Angus, et al</td>
</tr>
<tr>
<td></td>
<td>So you want to start your own solo or small firm practice. How do you do it? What are your first steps? What do you need to think of? What obstacles exist? How do you get to the day when you hang up your shingle and open your door to clients? What surprises – pleasant and otherwise – might you have? Join our panel of Vermont attorneys who have started their own practices for this valuable, experience-based discussion that will equip you to take the step toward starting your own firm.</td>
<td></td>
</tr>
<tr>
<td>4b)</td>
<td>Balancing Budgets: You Don’t Have To Spend a Lot of Money for that Law Firm</td>
<td>Brian Amones, Jared Correia, Roger Kohn, Kevin Ryan</td>
</tr>
<tr>
<td></td>
<td>Whether you're building or reengineering your law firm technology platform, you might be surprised by how far you can stretch your dollar. In this lively session, panelists will consider a range of technology budgets, and construct the best possible law office technology platforms for the money. In addition to essential technology, panelists will offer optional tools, including for uses within specific practice areas. The modern lawyers has got to find efficiencies at short dollars. Building out a technology platform for a reasonable sum of money is a great start. So, start here.</td>
<td></td>
</tr>
<tr>
<td>4c)</td>
<td>Ethical Traps for Solos &amp; Small Firms</td>
<td>Mike Kennedy</td>
</tr>
<tr>
<td></td>
<td>What distinctive ethical issues do solo and small firm attorneys face in their practices? How do the Rules of Professional Conduct structure the way you should cope with those issues? What traps lie in wait for the unattentive practitioner? Join Mike Kennedy for this look at the ethical challenges of small firm practice in the Green Mountain State.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Solo practitioners and lawyers in small firms often wonder whether the law practice they have created has value for purposes of succession or transition. This program will discuss what makes a law practice valuable and how most lawyers can receive financial rewards by transitioning their practice to other lawyers. Learn about the options that may be available and how succession transactions are occurring in cities and in rural areas of New England.</td>
<td></td>
</tr>
</tbody>
</table>

---

#### 10:30—11:00pm Break with Sponsors
### 5a) Making It Work: Tips from Those Who Have Done It

**Speakers:** Susan Cartier Liebel, Mike Caccavo, Roger Kohn, John Thrasher

In this session Susan Cartier Liebel is joined by some of your Vermont colleagues to provide tips on how to make your solo or small firm work effectively and profitably. What tricks have they learned about starting and managing a small firm? What hurdles have they encountered and how did they surmount them? What advice would they give to those just starting out, to those struggling along, or to those who would like to breathe new life into their practice?

### 5b) Unleashing the Power of Casemaker

**Speaker:** Rebecca Skeeles

This informative program will instruct you on how to effectively use Casemaker, the Vermont Bar’s comprehensive, online legal research tool available exclusively to members and now includes CasemakerPRO free with membership. CasemakerPRO is a package of premium products designed to enhance Casemaker’s capabilities, as well as provide you with valuable new services – CaseCheck+, Casemaker’s citator that identifies whether or not your case law citations are still good law; CasemakerDigest provides a first look into the most recent decisions handed down by the state and federal courts; and CiteCheck, a personal cite checker for a pleading, brief or other document. A step-by-step demonstration will reveal the wealth of information available to you and will demonstrate key features.

### 5c) 6 Principles for Increasing Efficiency, Quality, and Client Service

**Speaker:** Dustin Cole

Are you working harder than you need to, collecting less than you should, constantly feeling stressed or overwhelmed? Learn the principles that will help you operate more efficiently, enjoy your clients more, and reduce your collections problems.

### 5d) Hey You, Get Off of My Cloud (And Out of My Data)

**Speakers:** Dave Fenster and Kevin Ryan

Your clients, and increasingly your own practice, are “in the cloud” and rely on a variety of mobile devices to communicate and do business. But as technological change buffets the legal profession, it creates its own host of new problems. Lawyers are not – and cannot be expected to be – technology experts, but they are required to be sure they have taken reasonable steps to safeguard their clients’ (and their own) information. In this program David Fenster and Kevin Ryan examine the new risks and discuss the steps you need to take to ensure physical and digital security in a more mobile practice environment. This program is filled with tips and practical advice you can use immediately to make your work and your clients’ property more secure.

### 12:30—12:45pm Break with Sponsors

**B&F Financial Analytics, Inc.**

**Casemaker**

**Exchange Authority**

**Pinnacle Financial**

“Corporate Benefits and Financial Solutions”
6) Big Enough Data: Analytics in the Small Law Firm Environment  Speaker: Jared Correia

Solo and small firm law offices usually run on guile. Decisions are made based on gut feelings. Ad hoc systems complement unstructured workflows. If business plans exist, it is rare that these are written down. Many solo and small firm attorneys focus on the substantive practice first, and will the business management to exist.

There is a better way. Rather than letting the business run him or her, the modern lawyer can use data to make better decisions about law practice management. Big law is already doing it, using expensive products to render massive data sets down to useful reports. But, even if solos and small firms can’t buy into high-end product lines, there is the opportunity to build better strategies by tapping into data that already exists within those practices.

You can use what you already have to even the playing field . . . or, better yet, gain a distinct advantage over your competition.

7a) Unleashing the Power of Casemaker: Advanced Speaker: Rebecca Skeeles
This session, designed for those familiar with the basic features of the Casemaker Web Library, will provide an overview on how to use the Casemaker library to your best advantage. Casemaker is the Vermont Bar’s comprehensive, online legal research tool available exclusively to members. Topics covered include research techniques, resources, saving research results and annotating and organizing research results for incorporation into memoranda or briefs. This online demonstration of Casemaker’s latest features will assist lawyers in using the library most effectively, whether they are new to Casemaker or have used it in the past.

7b) Office Accounting: Take Control of Your Finances to Take Control of Your Practice Speaker: Wendelyn Duquette, Quick$tar
This session will focus on important steps you can and should take to understand and be in control of the financial well-being of your practice. We will use QuickBooks products for demonstration purposes, focusing on the fundamentals of practice accounting, touching on practice management integration with QuickBooks and simplifying the management of client trust accounts.

7c) Don’t Shut the Doors: Transition Your Practice to the Next Generation Speaker: Dustin Cole
The typical attorney approach to retirement is “when I’m done, I’m done. I’ll just close up shop and step away.” Learn about the unexpected complexity of closing down, and the potentially large lost income opportunities. Discover how to make the most, financially, professionally and personally, of your transition.

7d) Tax Issues You’ll Face in Your Solo or Small Firm Practice Speaker: Wendy Fitzsimons
This session will provide a broad and pragmatic overview of the Tax Code and its impact on your clients. Tax issues facing the divorce, real estate, trust and estate, as well as the small business client will be examined. Updates in the tax code will be provided as well as resources, including IRS publications. Capital gains will be reviewed in the context of a real estate transaction. The interplay of the income, gift, and estate tax regulations will be analyzed in the context of the trust and estate client. Entity formation and its relationship to the tax code will be summarized for LLCs, C Corporations, and S Corporations. Finally, this session will address the implication of the Tax Code in settlement negotiations for a divorce action.
Friday, May 15, 2015 Continued

3:30—3:45 Break with Sponsors

3:45—5:15 Concurrent Sessions

<table>
<thead>
<tr>
<th>Session</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8a) The Un-Program (Bring Your Questions &amp; Share Your Tips)</td>
<td>What questions do you have about running your solo or small practice effectively and efficiently? Have you found an innovative and successful way to solve problems shared by other practitioners? This session is designed to put both sorts of people together in the same place. Bring your questions. Bring your tips. In the “un-program” you will not be faced with a panel of experts, but with an audience of your peers, all of whom are wrestling with the same issues and hunting for the same sorts of solutions. It’s a roundtable discussion without an agenda – except the agenda YOU set.</td>
</tr>
<tr>
<td>8b) The Shoeless Cobbler: When It Comes to Employment Law Compliance, Law Firms Can Be Their Own Worst Client</td>
<td>This will be an interactive, consciousness-raising discussion, rather than a technical seminar. Among the topics to be considered are: policies, posters and recordkeeping; unemployment and workers’ compensation; misclassification of employees; remote workers; off-the-clock work and overtime; family responsibilities and flex time; pregnancy discrimination; drug use and drug testing; workplace bullying; and much more.</td>
</tr>
<tr>
<td>8c) All About the Benjamins: Fee Rules in Veterans Disability Cases</td>
<td>Until 2006, attorneys were allowed to take a maximum fee of $10 in veterans’ cases before the Department of Veterans Affairs. When Congress updated this antiquated fee structure to allow attorneys to take a “reasonable fee” for these cases, a complex system of rules emerged. Veterans make up 8% of Vermont’s population, and are in desperate need of attorneys to help them navigate the VA system to get the benefits they are entitled to. After this short session, attorneys can expand their menu of services to include veterans’ cases, practice an emerging area of law, do good work, and get paid at the same time!</td>
</tr>
</tbody>
</table>

Thank you for coming!

HAVE A SAFE DRIVE HOME

You’ll be receiving a link to a survey and we would appreciate it very much if you would give us your feedback on any and all aspects of this year’s conference.
Basin Harbor Club

Please return this form to: VBA, PO Box 100, Montpelier, VT 05601 FAX # 802-222-1573

REGISTRATION FEES
(Add $20 after May 7, 2015)

<table>
<thead>
<tr>
<th></th>
<th>VBA Members</th>
<th>Non-VBA Members</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$395</td>
<td>$595</td>
</tr>
</tbody>
</table>

GUEST MEAL FEES

<table>
<thead>
<tr>
<th>Tuesday</th>
<th>Lunch &amp; Break</th>
<th>$35 x # guests</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Reception/Dinner</td>
<td>$100 x # guests</td>
</tr>
<tr>
<td>Wednesday</td>
<td>Breakfast Buffet</td>
<td>$28 x # guests</td>
</tr>
<tr>
<td></td>
<td>Lunch &amp; Break</td>
<td>$35 x # guests</td>
</tr>
<tr>
<td>Thursday</td>
<td>Breakfast Buffet</td>
<td>$28 x # guests</td>
</tr>
<tr>
<td></td>
<td>Lunch &amp; Break</td>
<td>$35 x # guests</td>
</tr>
<tr>
<td>Friday</td>
<td>Breakfast Buffet</td>
<td>$28 x # guests</td>
</tr>
<tr>
<td></td>
<td>Lunch &amp; Break</td>
<td>$35 x # guests</td>
</tr>
<tr>
<td></td>
<td>TOTAL Registration Fees &amp; Guest Meals:</td>
<td>$________</td>
</tr>
</tbody>
</table>

Thursday, May 14, 2015

12:00—1:00 Lunch Plenary (1.0 MCLE Credit)

1) Building the 21st Century Solo/Small Firm Practice or This
What I’d Do If I Was Building My Practice Today

1:10—2:40 Concurrent Sessions (1.5 MCLE Credit)

2a) Views from the Bench

2b) Building a 21st Century Solo/Small Firm Practice: A Follow-up
Conversation

2c) Should I? Getting It Right with Client Selection

2d) Stress Management for Attorneys

3:00—4:30 Concurrent Sessions (1.5 MCLE Credit)

3a) Coping with Student Loans

3b) The Good, the Bad, the Ugly of Web, Social Media, Advertising

3c) Tax Savings for Small Law Firms

3d) Balanced Living for Attorneys: A Primer

Friday, May 15, 2015

9:00—10:30 Concurrent Sessions (1.5 MCLE Credit)

4a) Starting Your Own Firm

4b) Balancing Budgets: You Don’t Have To Spend a Lot of Money
for that Law Firm

4c) Ethical Traps for Solos & Small Firms (1.5 Ethics Credit)

4d) Financial Aspects of Succession Planning

Friday, May 15, 2015 CONTINUED

11:00—12:30 Concurrent Sessions (1.5 MCLE Credit)

5a) Making It Work: Tips from Those Who’ve Done It

5b) Unleashing the Power of Casemaker

5c) 6 Principles for Increasing Efficiency, Quality, and Client
Service

5d) Hey You, Get Off of My Cloud (And Out of My Data)

12:45—1:45 Lunch Plenary (1.0 MCLE Credit)

6) Big Enough Data: Analytics in the Small Law Firm Environment

2:00—3:30 Concurrent Sessions (1.5 MCLE Credit)

7a) Unleashing the Power of Casemaker: Advanced

7b) Office Accounting: Take Control of Your Finances to Take
Control of Your Practice

7c) Don’t Shut the Doors: Transition Your Practice to the Next
Generation

7d) Tax Issues You’ll Face in Your Solo or Small Firm Practice

3:45—5:15 Concurrent Sessions (1.5 MCLE Credit)

8a) The Un-Program

8b) The Shoeless Cobbler: When It Comes to Employment Law
Compliance, Law Firms Can Be Their Own Worst Client

8c) All About the Benjamins: Fee Rules in Veterans Disability
Cases

Notice to all registrants, instructors, sponsors, exhibitors, and guests: By attending this VBA event, you understand and agree that you may be photographed and/or electronically recorded during the event and you hereby grant to the VBA the right to use and distribute your name and likeness for promotional or educational purposes without monetary compensation. The VBA assumes no liability for such use.