

SOLO AND SMALL FIRM WORKSHOP SERIES

UMKC School of Law
500 East 52nd Street
Kansas City, Missouri

Registration begins at 1:45 p.m.
All sessions begin at 2 p.m. and
adjourn at 5:30 p.m.

“NEGOTIATING LAW FIRM FORMATION”
ENTREPRENEURIAL LAWYERING PRACTICUM
FRIDAY, OCTOBER 16, 2009
Instructor: Professor Anthony J. Luppino
CLE Credit: 4 (2 ethics) Missouri / Kansas pending

- Topics:
- Choice of Entity Issues
 - Ethical Considerations in the Available Types of Entities, Names & Letterhead; Rule 5.4; Multi-Disciplinary Practice and Multi-Jurisdictional Practice
 - Negotiating Key Rights and Obligations
 - Special Considerations Re: Withdrawal of a Firm Member
 - Ethical Considerations Regarding Withdrawal; Constraints Relating to Prohibitions on Restricting Competition and Ethics Opinions in Relation to Various Law Firm Agreement Provisions
 - Selected Drafting Tips

ETHICALLY GETTING BUSINESS: ETHICAL MARKETING
INCLUDING ADVERTISING AND SOLICITATION
FRIDAY, FEBRUARY 12, 2010
Instructors: Dean Ellen Y. Suni
CLE Credit: 4 (4 ethics) Missouri / Kansas pending

- Topics:
- The Constitutional Framework
 - Advertising Methods: choosing an effective & ethical approach for your practice
 - Solicitation and Referral – How to stay on the ethical and productive side of the lines
 - Ethical Internet Advertising, Maintaining Confidentiality in E-mail Correspondence, and Other Ethical Issues of the Electronic Age
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JOINING AND LEAVING: ETHICAL HIRING, FIRING AND UNWINDING
FRIDAY, NOVEMBER 13, 2009
Instructors: Dean Barbara Glesner-Fines
Patrick M. Gavin • Of counsel, Husch Blackwell Sanders LLP
CLE Credit: 4 (4 ethics) Missouri / Kansas pending

- Topics:
- From Solo to Small Firm – Ethical Implications of Hiring Attorney or staff?
 - Clarifying the terms of the relationship
 - Assisting in unauthorized practice (Rule 5.5)
 - Scope of proper delegation
 - How to limit authority
 - Imputed conflicts of interest
 - Supervising Others
 - Breaking up
 - Types of breakups
 - Sources of law governing attorneys in breakups – variance and conflict
 - Duties to clients and partners
 - Suggestions for ethical practice

FINDING, SAVING AND PROTECTING INFORMATION THAT IS
CRUCIAL TO YOUR PRACTICE
FRIDAY, MARCH 12, 2010
Panel: Dean Ellen Y. Suni, Law Library Director Paul Callister
and Associate Law Library Director Phill Johnson
CLE Credit: 4 Missouri (4 ethics) / Kansas pending

- Topics:
- Records Retention Policies that Satisfy Ethical Standards
 - Research Tips for Practitioners
 - Backup and Security
 - Disaster Planning
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YOUR FIRST MEETING WITH A CLIENT; INTERVIEWING AND
COUNSELING FOR SOLO AND SMALL FIRM LAWYERS
FRIDAY, APRIL 16, 2010
Instructor: Professor David Achtenberg
CLE Credit: 4 (4 ethics) Missouri / Kansas pending

- Topics:
- How To Structure Your First Interview
 - What You Should Already Know About Your Prospective Client
 - What to Accomplish in the Crucial First 5 Minutes
 - How to Determine What the Client Really Wants
 - How to Convey Competence and Avoid Unrealistic Expectations
 - How to Answer Impossible Questions
 - When and How to Say “No Thank You”
 - What You Should Do After the Client Leaves

INSURANCE, MALPRACTICE, SYSTEMS/TRUST ACCOUNTING
FRIDAY, JANUARY 22, 2010
Instructors: Associate Dean Jeffrey Thomas and Christian Stiegemeier
CLE Credit: 4 (4 ethics) Missouri / Kansas pending

- Topics:
- Systems and Trust Accounting: Calendaring Systems to Avoid Missing Statute of Limitations, Motion Deadlines, Depositions, Client Meetings and Other Important Stuff
 - Avoiding Malpractice Claims With Conflicts Checking Systems
 - Handling Your Trust Account
 - Ethical Ways in Dealing with Mistakes
 - Avoiding Liability with Documentation
 - Insurance 101 for Attorneys:
 - Everything you need to know about professional malpractice insurance