STATE BAR OF WISCONSIN
PINNACLE
Your Practice. Our Purpose.

The Wisconsin Law Firm Self-Assessment

Program dates start May 8. Register today!

4 CLE
4 EPR

The Wisconsin Law Firm Self-Assessment

Eliminate risky business

The Wisconsin Law Firm Self-Assessment is a new tool from the State Bar of Wisconsin that allows attorneys to review their firm's current policies, procedures, and management practices, and identify areas where they could be better serving clients. In this half-day program, State Bar Ethics Counsel, the Law Practice Assistance Manager, and the director of the Office of Lawyer Regulation (OLR) will discuss:

- Key takeaways from eight modules in the assessment, including competence, communication, staff management, appropriate fees, and trust accounts
- How your firm can implement improvements, measure their impact, and demonstrate compliance with regulatory objectives
- Why investing in improving law firm management pays dividends

Who should attend:

- Solo and small firm lawyers
- Law firm management
- Any lawyer seeking to improve firm management and reduce malpractice claims

How you'll benefit:

- Identify needed improvements in your firm's policies, procedures, training, and management
- Improve your firm's compliance with the Rules of Professional Conduct
- Increase client satisfaction and reduce grievances and malpractice claims
- Get tips for establishing measurable policies and procedures to track your firm's progress

Register now!

Schedule

8:00 AM **Registration**

8:30 AM **Assessment Intro, Developing Competent Practices and Client Communications**

- Background and purpose of the law firm assessment
- Do you have the necessary skills, financial resources, and infrastructure to represent clients?
- Communicating the scope of the representation, fees, and complying with established procedures

9:20 AM **Confidentiality and Avoiding Conflicts of Interest**

- Establishing policies and procedures for client confidentiality
- Preventing, identifying, and remediating breaches
- Establishing processes to identify and resolve conflicts

10:10 AM **Break**

10.25 AM **File and Law Firm Management**

- File management, security, and retention policies
- Safeguards for cloud computing
- Business continuity and disaster planning
- Opening, managing, and closing law firms
- Hiring, supervision, and termination of staff

11:15 AM **Charging Appropriate Fees and Trust Account Practices**

- Identifying clients, establishing proper fee agreements, and outlining the scope of a representation
- Creating a trust account, ensuring compliance with Wisconsin Supreme Court Rules, and enacting policies and procedures

12:05 PM **Program Concludes**

Following start time, webcast replay schedule will vary slightly from above listed times.

Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **4.0 CLE credits including 4.0 Ethics and Professional Responsibility credits**.

Faculty

Program Presenters

Timothy J. Pierce
Ethics Counsel
State Bar of Wisconsin
Madison

Keith L. Sellen
Director
Office of Lawyer Regulation
Madison

Christopher Shattuck
Law Practice Assistance Manager
State Bar of Wisconsin
Madison

Dates

Live Webcast

Friday, May 8, 2020

Webcast Replays

Tuesday, May 19, 2020
Wednesday, May 27, 2020
Monday, June 1, 2020
Thursday, June 11, 2020
Friday, June 19, 2020

Additional webcast replay dates are available for this program. Visit **wisbar.org/seminars** for more information and to register.

Registration

ONLINE: www.wisbar.org/seminars

PHONE: (800) 728-7788

FAX: (608) 257-5502

MAIL: State Bar PINNACLE Registrations
P.O. Box 7158
Madison, WI
53707-7158

State Bar CLE/PINNACLE Passbook Registrations:

Passbook Certificates must be received by the State Bar at least one business day prior to the event.

Registration Cancellations:

Visit **wisbar.org/cancellation_policy** for information on PINNACLE registration cancellation policies.

Course materials for those attending the seminar:

Course materials are provided in PDF format and are downloadable from *my*StateBar on wisbar.org up to two days prior to and 90 days after your seminar.

Book sale!

Wisconsin Ethics Opinions

Save 20% on *Wisconsin Ethics Opinions*.* It contains the complete text of opinions issued since 1954 – including Formal and Informal Opinions and Memorandum Decisions – by the State Bar's Standing Committee on Professional Ethics.

Use **discount code CA3006** when you order online or by calling (800) 728-7788. Plus, all seminar attendees receive a free two-week trial of the *Books UnBound®* version.

Print Book: #AK0049; 614+ pp.; 2nd ed., 2016 -17 (includes 2018-19 supplement)
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Additional Learning Opportunities

Lawyer Trust & Fiduciary Account Basics 2020

Know when you need a trust account or fiduciary account. Comprehend OLR guidelines for trust account and fiduciary account records. Ethically comply with trust and fiduciary account rules and guidelines. Confidently work with trust and fiduciary accounts. **4 CLE/EPR**

Live Webcast: April 15, 2020

Webcast Replays: April 24, 2020 | April 30, 2020 | May 6, 2020 | May 11, 2020
May 20, 2020 | May 26, 2020 | June 4, 2020

Legal Ethics 2019

Recognize common issues that raise ethical quandaries. Receive specific guidance on how to ethically respond to common legal issues. Discover Rules you may not be familiar with. Gain a better understanding of the guidance governing ethical conduct. **4 CLE/EPR**

Webcast Replays: April 15, 2020 | May 21, 2020 | May 26, 2020 | May 29, 2020
June 2, 2020 | June 11, 2020

Law Office Video: Legal Ethics for Support Staff

This instructive video presents a variety of ethical and professional issues that arise in a law office. It prepares your staff for possible ethical situations they may face and demonstrates a variety of ways to handle and prevent ethical violations. Appx. 22 mins.

English DVD: #ED0017; **Member:** $69 | **Nonmember:** $89

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Priority Code: S3838B

SEMINAR TUITION	WEBCAST SEMINAR: With Downloadable (PDF) Course Materials
☐ State Bar Member	☐ $229
☐ Nonmember	☐ $309
☐ Ultimate Pass Subscriber	☐ $0
☐ Passbook Certificate User	☐ 1 Certificate

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☐ Lawyer State Bar Member No.________________

☐ Nonlawyer Profession ________________

Name ________________

Firm Name ________________

Address ________________

City/State/Zip ________________

Phone Number ________________

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Payment: Tuition Amount Enclosed $________

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To purchase written course materials for those **not** attending this program, contact the State Bar at (800) 728-7788.

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Event Code: CA3006MW R R2 R3 R4 R5