



# Fee Agreements, Credit Card Payments, and Trust Account Obligations

**Program dates start August 5. Register today!**

**4 CLE  
4 EPR**

# Fee Agreements, Credit Card Payments, and Trust Account Obligations

## How to integrate credit card processing into your business

Our trust accounting series continues on with a half-day program on how to accept credit card payments. The State Bar's Law Practice Assistance Manager, Ethics Counsel, and the Administrator of the Office of Lawyer Regulation (OLR) Trust Account Program will briefly recap key elements covered in *Trust & Fiduciary Account Basics*, before focusing the discussion on:

- Relevant Supreme Court rules for getting paid ethically
- How the rules work in practice
- Common scenarios you may encounter and how to properly respond

All attorneys, regardless of experience level, will benefit from attending this timely review, especially as law offices continue conducting business remotely and clients need more flexible payment options in the midst of a pandemic.

## Who should attend:

- All lawyers
- Paralegals/Legal assistants

## How you'll benefit:

- Improve your understanding of fee agreements
- Know how to ethically accept credit card payments
- Learn modernized trust account rules related to E-banking
- Confidently agree to and accept payment from your clients

**Register now!**

## Schedule

### 8:30 AM Identifying Fee Agreements and Related Attorney Trust Account Obligations

- Difference Between Fees and Costs
- Advanced, Hourly & Flat Fees
- Contingent Fee
- Retainer
- Referral Fees
- Nonrefundable Retainers & Advanced Fees

### 10:10 AM Break

### 10:25 AM Accepting Credit Card Payments

- E-banking: Modernizing Trust Account Rules
- Trust Account Options for Accepting Credit Card Payments
- Fees and Surcharges on Legal Fees and Costs (convenience fees, surcharges, Circuit Court eFiling, payment of a settlement or any other type of payment owed to the client).
- Proper Processing Protocols

### 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.**

*This program is sponsored by:*

**LAWPAY**<sup>®</sup>  
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## Faculty

### Program Presenters

#### Timothy J. Pierce

Ethics Counsel  
State Bar of Wisconsin  
Madison

#### Christopher Shattuck

Law Practice Assistance Manager  
State Bar of Wisconsin  
Madison

#### Travis J. Stieren

Trust Account Program Administrator  
Office of Lawyer Regulation  
Madison

## Dates

### Live Webcast

Wednesday, August 5, 2020

### Webcast Replays

Friday, August 14, 2020

Thursday, August 20, 2020

Wednesday, August 26, 2020

Monday, August 31, 2020

Tuesday, September 8, 2020

Wednesday, September 16, 2020

Additional webcast replay dates are available for this program. Visit [wisbar.org/seminars](http://wisbar.org/seminars) for more information and to register.

## Registration

**ONLINE:** [www.wisbar.org/seminars](http://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](http://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 *myStateBar* on [wisbar.org](http://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*.<sup>\*</sup> A necessity for all practicing Wisconsin attorneys: 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 CA3069** when you order online or by calling (800) 728-7788. Plus, all seminar attendees receive a free two-week trial of the *Books UnBound*<sup>®</sup> version.

**Print Book:** #AK0049; 614+ pp.; 2nd ed., 2016 -17  
(includes 2019-20 supplement)

**Member:** ~~\$110~~ \$88 | **Nonmember:** ~~\$139~~ \$111.20

**Books UnBound<sup>®</sup> Subscription:** #AE0049\_SUB

**Member:** ~~\$150~~ \$120 | **Nonmember:** ~~\$187.50~~ \$150

<sup>\*</sup>Discount applies to both print and digital *Books UnBound*<sup>®</sup> editions of this title and cannot be applied to previous purchases. Offer valid as long as CLE credit is available for this program. For *Books UnBound* users, discount may be applied to purchase of individual *Books UnBound* title only and may not be used on purchase of full library.



## Additional Learning Opportunities

### The Wisconsin Law Firm Self-Assessment

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. Reduce grievances and malpractice claims. Get tips for establishing measurable policies and procedures to track your firm's progress. **4 CLE**

**CLE OnDemand Seminar:** #CA3006D; **Member:** \$229 | **Nonmember:** \$309

### Wisconsin Attorney's Desk Reference

Caught in a case involving an unfamiliar practice area? Turn to the *Wisconsin Attorney's Desk Reference*. This easy-to-use guide covers 11 practice areas and 35 topics grouped by related subject areas. (Updated annually.)

**Print Book:** #AK0003E20; 1,230+ pp.; 2020; **Member:** \$166 | **Nonmember:** \$210

**Books UnBound<sup>®</sup> Subscription:** #AE0003\_SUB; **Member:** \$180 | **Nonmember:** \$225

### Law Office Video: Legal Ethics for Support Staff

This instructive video prepares you staff for possible ethical situations that may face working in a law office and effectively demonstrates ways to avoid ethical violations.

**English DVD:** #ED0017; Appx. 22 mins.; **Member:** \$69 | **Nonmember:** \$89

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Priority Code: **S 3 9 2 6 B**

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$229
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To purchase written course materials for those **not** attending this program, contact the State Bar at (800) 728-7788.

**NOTICE:** By attending this State Bar event, you understand and agree that you may be photographed and/or electronically recorded during the event and you hereby grant to the State Bar the right to use and distribute your name and likeness for promotional or educational purposes without monetary compensation. The State Bar assumes no liability for such use.

**Mail to:** State Bar PINNACLE Registrations  
P.O. Box 7158  
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## Improve your practice. Improve your life.

As a benefit of your membership in the State Bar of Wisconsin, you have access to Practice411 – the State Bar’s Law Office Management Assistance Program – which offers **free**, individualized assistance on a wide range of practice management topics.



### Practice411 can help you implement systems and controls that will allow you to:

- Achieve greater efficiency
- Improve client relations
- Reduce risks to your practice
- Improve quality of life

Practice411 offers the resources you need to manage the business aspects of your practice, including the use of technology; business, financial, and succession planning; personnel, facilities, and operations management.

Practice411 services are available for all State Bar of Wisconsin members, but are of particular interest to sole practitioners and small-firm attorneys who may not have the time or the resources to build their practice management skills or to learn best practices to help them succeed.

**Contact Practice411 today for  
a free consultation.**

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**Email:** PracticeHelp@wisbar.org

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