



Legal Ethics 2022

Policies and Procedures
for a Successful Practice

Program dates start October 6. Register today!

4 Credit Hours:

- 3 CLE credits including 3 EPR credits
- 1 LAU credit

Legal Ethics 2022

Policies and Procedures for a Successful Practice

Co-produced with the State Bar of Wisconsin Committee on Professional Ethics

Keep your practice on the level

Ensuring your firm - big or small - complies with ethical obligations is one of your most important responsibilities as an attorney. And when you supervise staff, you're not practicing law by yourself. Unfortunately, that makes you potentially liable for the misconduct of others you work with. At *Legal Ethics 2022: Policies and Procedures for a Successful Practice*, you'll discover the tools you need to ensure everyone you practice with behaves on the up and up.

You'll understand what policies and procedures to implement when it comes to checking for conflicts, calendaring, billing, and social media use. Plus, get tips on developing a business continuity plan and learn about policies that can help to cultivate a happier work environment.

How you'll benefit:

- Analyze real-life ethical scenarios and assess how you would and should respond
- Receive ethics guidance from stalwarts of the State Bar's Committee on Professional Ethics
- Understand and meet ethical obligations related to filing, billing, technology, and more
- Discover and implement policies that foster well-being in the workplace

Who should attend:

- All lawyers
- Paralegals
- Legal assistants
- Law office managers

Legal Ethics 2022: Policies and Procedures for a Successful Practice will give you the guidance you need to prevent ethical violations and inspire better employee performance. **Register now!**

Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for **4 credit hours** consisting of:

- **3 CLE credit hours including 3 Ethics and Professional Responsibility credit hours**
- **1 LAU credit hour**

About LAU credits

Attorneys may submit up to 6.0 LAU (Lawyer Awareness and Understanding) credits per CLE reporting period. To learn more about CLE credit types and rules, visit wisbar.org/credits.

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. For in-person seminars, walk-in registrations using Passbook certificates are also welcome.

Registration cancellations: Please visit wisbar.org/cancellations 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 up to two days prior to and 90 days after your seminar.

COVID-19 safety information: Complete and current safety guidelines can be found at wisbar.org/covidsafety.

This program is sponsored by:

Wisconsin Lawyers Mutual
INSURANCE COMPANY



Schedule

8:00 AM Registration

8:30 AM Commencing the Representation

- File Management
 - ▶ Where and how are files, both active and closed, stored?
 - ▶ How are files numbered?
 - ▶ What is included in the file and how is the file organized?
- Opening A File
 - ▶ What are the procedures for opening a file?
- Checking for Conflicts
 - ▶ What information should be included in the conflict database?
 - ▶ Who is responsible for entering the information into the database?
 - ▶ Who is responsible for checking for conflicts?
- Master Calendar
 - ▶ What information should be entered on the Master Calendar?
 - ▶ Who is responsible for entering the information?
 - ▶ Will calendar alerts be sent out and who is responsible for sending out the alerts?

9:20 AM Ending the Representation

- Closing a File
 - ▶ Send a closing letter to the client
 - ▶ If retaining the files electronically, return original documents to the client
- File Retention and Destruction
 - ▶ How long will the file be retained and in which format?

10:10 AM Break

10:25 AM Billing for Services

- What must be included in an Engagement Agreement?
- Who is responsible for the various billing tasks?
- What is the billing cycle?
- What is billable?
- Proper contents of a bill

10:40 AM Managing the Law Practice in the New Age

- Technology
 - ▶ What types of training will be required?
 - ▶ Password requirements
 - ▶ Use of firm's technology for personal use
- Email
 - ▶ Confidentiality obligations
 - ▶ Dealing with the missent communication
 - ▶ Reply All and Autocomplete

- Social Media
 - ▶ Personal posts and marketing posts
 - ▶ Duty of competence with social media

11:00 AM Business Continuity and Disaster Recovery

11:15 AM Lawyer Well-Being in the Office Setting

- Policies and procedures that can foster lawyer-wellbeing
- Managing expectations
- Duties of supervision of others

12:05 PM Program Concludes

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

Faculty

Presenters

Dean R. Dietrich

Weld Riley, S.C., Wausau

Aviva Meridian Kaiser

State Bar of Wisconsin, Madison

Julia Persike

State Bar of Wisconsin, Madison

Timothy J. Pierce

State Bar of Wisconsin, Madison

Stacie H. Rosenzweig

Halling & Cayo, S.C.

Milwaukee

Timothy C. Samuelson

Office of Lawyer Regulation, Madison

Christopher C. Shattuck

State Bar of Wisconsin, Madison

Additional webcast replay dates are available for this program.

Visit wisbar.org/seminars for more information and to register.

Dates

Locations

In-Person Seminar – Madison

Thursday, October 6, 2022

State Bar Center

5302 Eastpark Blvd., Madison, WI

In-Person Seminar – Milwaukee

Friday, October 7, 2022

Radisson Hotel Milwaukee West

2303 North Mayfair Road, Milwaukee, WI

Live Webcast

Thursday, October 6, 2022

Webcast Replays

Monday, October 17, 2022

Friday, October 21, 2022

Thursday, October 27, 2022

Tuesday, November 1, 2022

Wednesday, November 9, 2022

Monday, November 14, 2022

Thursday, November 17, 2022

Wednesday, November 23, 2022

Tuesday, November 29, 2022

Saturday, December 3, 2022

Tuesday, December 6, 2022

Friday, December 9, 2022

Book sale!

Wisconsin Ethics Opinions

SAVE 20% on *Wisconsin Ethics Opinions*.* Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version. It's your go-to source for the ethics guidance you're looking for to help you stay within the bounds of professional conduct as defined by the Wisconsin Supreme Court.

Use discount code **CA3313** when you order online at wisbar.org/AK0049 or by calling (800) 728-7788.

Print Book: #AK0049; 614+ pp.; 2nd ed., 2016–17 (Includes 2017–2021 supplements)
Member: ~~\$125~~ \$100 | **Nonmember:** ~~\$156.25~~ \$125

Books UnBound Subscription: #AE0049_SUB
Member: ~~\$124~~ \$99.20 | **Nonmember:** ~~\$155~~ \$124

*Discount applies to both print and digital Books UnBound 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

Fall 2022 Ethics Webcast Series

This series of 75-minute webcasts focuses on a variety of ethical issues, including the duty of honesty, restrictions on the right to practice, representing government entities, possession of evidence in criminal cases, responding to the OLR, attorney wellness, & more!

Each Program: 1.5 CLE/1.5 EPR **Program Dates Start:** September 22, 2022

Family Law Ethics

A program tailored specifically for family law practitioners, you'll explore real-world ethical scenarios and learn from the experiences of other family law practitioners. Earn the EPR credits you need and gain knowledge essential to ethical practice.

In-Person Madison Seminar and Live Webcast: Dec. 14, 2022

Webcast Replays: Dec. 22, 2022 | Dec. 27, 2022 | Jan. 6, 2023 | Jan. 9, 2023
 Jan. 12, 2023 | Jan. 17, 2023 | Jan. 25, 2023

Wisconsin Attorney's Desk Reference

Perfect as a primer, refresher, or a starting point, the *Desk Reference* is a guide for any attorney who needs quick answers or a brief introduction to an area of law. It contains actionable information on 11 different practice areas and 35 topics condensed into a user-friendly format.

Print Book: #AK0003; 1,256+ pp.; 2021; **Member:** \$199 | **Nonmember:** \$248.75
Books UnBound Subscription: #AE0003_SUB; **Member:** \$196 | **Nonmember:** \$245

Legal Ethics 2022

Priority Code: **S 4 1 4 5 B**

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$239	<input type="checkbox"/> \$269
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$319	<input type="checkbox"/> \$349
<input type="checkbox"/> Ultimate Pass Gold/Silver	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
<input type="checkbox"/> Ultimate Pass Bronze	<input type="checkbox"/> \$239	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

IN-PERSON SEMINARS:

- Thursday, Oct. 6, 2022 – **Madison**
- Friday, Oct. 7, 2022 – **Milwaukee**

WEBCAST REPLAYS:

- Monday, Oct. 17, 2022
- Friday, Oct. 21, 2022
- Thursday, Oct. 27, 2022
- Tuesday, Nov. 1, 2022
- Wednesday, Nov. 9, 2022
- Monday, Nov. 14, 2022
- Thursday, Nov. 17, 2022
- Wednesday, Nov. 23, 2022
- Tuesday, Nov. 29, 2022
- Saturday, Dec. 3, 2022
- Tuesday, Dec. 6, 2022
- Friday, Dec. 9, 2022

LIVE WEBCAST:

- Thursday, Oct. 6, 2022

Lawyer State Bar Member No. _____

Nonlawyer Profession _____

Name _____

Firm Name _____

Address _____

City/State/Zip _____

Phone Number _____

Email _____

PAYMENT: Tuition Amount Enclosed \$ _____

State Bar Passbook Certificate (enter certificate number) # _____

Check enclosed (payable to State Bar PINNACLE)

Ultimate Pass Gold Ultimate Pass Silver Ultimate Pass Bronze

VISA MasterCard American Express Discover Exp. Date _____

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Signature _____

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
 Madison, WI 53707-7158