




Oregon Law Institute  
of Lewis & Clark Law School

# Starting and Building a Successful Law Practice



*Opening your own law firm can be the most rewarding and challenging endeavor you'll encounter in your career. Our experienced faculty is made up of attorneys and professionals who have either been in your shoes or who have helped attorneys just like you. They will walk you through the process of hanging your shingle, with candid, practical advice and valuable ethics precautions.*

**Also available  
as live webcast!**

**Friday, May 18, 2012**

Oregon Convention Center  
777 NE Martin Luther King Jr. Blvd.  
Portland, Oregon

4.5 General and 2 Ethics MCLE Credits

# SCHEDULE

8:00 a.m. LATE REGISTRATION AND DISTRIBUTION OF MATERIALS

8:30–9:45 **Creating a Business Plan and Start-Up Considerations**

- To your own self be true—do you want to start an enterprise?
- Vision / goals / philosophy
- Going solo or starting with others?
- Choice of entity for your law practice—alternatives available and tax considerations
- Budget: financing the start-up period—what do you need and what will it cost?
- Marketing for a start-up
- Where do I practice?
- Hiring employees for your start-up firm
- Key hardware and software etc. (fixed/variable costs) for managing a successful practice
- Setting billing rates and billing
- Resources (including on-line) available for start-up
  - *John D. Ostrander*
  - *Kjersten H. Turpen*

9:45–10:00 BREAK

10:00–10:45 **Staffing Options**

- Working with legal and non-legal staff
- Contract vs. employee
- Flexible arrangements
- Outsourcing
  - *Andrew Altschul*

10:45–11:45 **Handling Money — Yours and Your Client’s**

- Whose money? Where it goes and when
- ABCs of bank accounts for your law firm
- Understanding lawyer trust accounts
- Trust accounting concepts to master to be in ethical compliance
- Flat fee agreements—how to handle earned-upon receipt vs. to be earned flat fees—avoid running into trouble
- Accepting credit cards
  - *Sheila M. Blackford*

11:45–1:00 LUNCH (on your own)

1:00–2:00 **How Do I Get Clients? Client Selection and Solicitation**

- Creating relationships to attract new clients
- Soliciting clients: dos and don’ts
- Soliciting the “right” clients
- How to accept or reject clients
- Minimizing risk; ethical constraints
  - *David J. Elkanich*
  - *Tracey Snoyer*

2:00–2:45 **Communicating with Clients**

- Providing initial case analysis
- Setting case budget expectations
- Apprising clients of significant case developments
- Terminating or withdrawing from representation
  - *Julia M. Hagan*

2:45–3:00 BREAK

# SCHEDULE *Continued*

3:00–4:15 **Challenges in Starting Your Own Firm and How to Overcome Them**

- Success stories and what we wish we had known from attorneys who have opened their own law firm
- Separating good advice from bad

**Moderator: Mark Johnson Roberts**

– *K. William Gibson*

– *Katherine Heekin*

– *C. Scott Howard*

4:15 p.m. ADJOURN

## FACULTY

### **Andrew Altschul**

*Buchanan Angeli Altschul & Sullivan LLP*

### **Sheila M. Blackford**

*Practice Management Advisor,  
Professional Liability Fund*

### **Thomas D'Amore**

*Program Co-Planner  
D'Amore Law Group*

### **David J. Elkanich**

*Hinshaw & Culbertson LLP*

### **K. William Gibson**

*Attorney, Arbitrator & Mediator*

### **Julia M. Hagan**

*Gevurtz Menashe Larson & Howe PC*

### **Katherine Heekin**

*Program Co-Planner  
The Heekin Law Firm*

### **C. Scott Howard**

*Kivel & Howard LLP*

### **Mark Johnson Roberts**

*Program Co-Planner  
Gevurtz Menashe Larson & Howe PC*

### **John D. Ostrander**

*Elliott, Ostrander & Preston*

### **Tracey Snoyer**

*Cascade Alliance*

### **Kjersten H. Turpen**

*KHT LLC*

### VIDEO REPLAYS

Please register at least one week prior to the replay date.

**Bend – 6/1/12**

**Replay 8:30 a.m.**

*Bryant Lovlien & Jarvis  
591 Mill View Way*

**Eugene – 5/25/12**

**Replay 8:30 a.m.**

*Harrang Long Gary & Rudnick PC  
360 East 10th Avenue, Ste. 300*

**Portland – 6/6/12**

**Replay 9:00 a.m.**

*Oregon Law Institute  
Gus J. Solomon Courthouse  
620 SW Main Street, Ste. 706*

### PROGRAM PRODUCTS

Even if you cannot attend, you can still get the program on CDs or DVDs. Use the order form in this brochure to order your set today! OLI Annual Passholders may purchase OLI program products at 50% off the full retail price.

### QUESTIONS?

Please call OLI at (503) 768-6580 in Portland or toll-free in Oregon at (800) 222-8213, e-mail us at [oli@lclark.edu](mailto:oli@lclark.edu), or visit our website at <http://go.lclark.edu/oli>.

# Starting and Building a Successful Law Practice

Friday, May 18, 2012

Name	OSB No. or Profession
Firm/Organization	
Street Address	City/State/Zip
Phone	E-Mail

Please "✓" appropriate box below:

- Live presentation
- Video replay. Location: \_\_\_\_\_ Date: \_\_\_\_\_  
Please register at least one week prior to the replay date.

## TUITION *Tuition prices apply to live and video replays.*

- \$189 Early registration (*received by May 14, 2012*)
- \$139 New attorneys (admitted 2009–2012) and legal staff (*received by May 14, 2012*)
- \$95 Legal aid attorneys (*received by May 14, 2012*)
- \$15 OLI Passholder (OLI Pass No. \_\_\_\_\_) and Oregon judges and their lawyer staff (*received by May 14, 2012*)
- \$20 **Add to above tuition if registration received after May 14, 2012**

**COURSE MATERIALS** *Included with registration. Please select one:*

- Electronic course book (*a link to a PDF of the materials will be emailed no later than 48 hours prior to the seminar date*)
- Print version

## LIVE WEBCAST REGISTRATION

This program will be broadcast LIVE over the internet on Friday, May 18, 2012, starting 8:30 a.m. Pacific Time. You may access this event from anywhere with an established internet connection. The webcast will include video and audio of the speakers and seminar handout materials — all on your computer! To register for the live webcast, please click [here](#) or go to our website at <http://go.lclark.edu/oli> and click on "Webcasts." See the next page for more details.

## PRODUCT ORDER *I am unable to attend. Please send me:*

- \$209 Audio CDs and print course book
- \$309 DVDs and print course book
- \$59 Print course book only
- Deduct 50% from product order if you are an OLI Passholder (OLI Pass No. \_\_\_\_\_)
- \$7.00 Note: Add \$7.00 shipping & handling fee to above product orders.**

ENCLOSED IS \$ \_\_\_\_\_ BY:

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...or fax (503-768-6585) or e-mail  
([oli@lclark.edu](mailto:oli@lclark.edu)) this registration form to  
OLI, including credit card information.

**CONFIRMATION:** Confirmation will be sent via e-mail.

**CANCELLATION POLICY:** Tuition minus a \$20 handling charge will be refunded if the cancellation request is *written and received* by Monday, May 14, 2012.

**NEED ASSISTANCE:** If you are a person with a disability, please let OLI know in time to make any necessary accommodations for you.

**TUITION ASSISTANCE:** A limited number of scholarships are available based on financial need. Contact OLI.

**QUESTIONS?** Call (503) 768-6580 or (800) 222-8213. Check out our website at <http://go.lclark.edu/oli> or e-mail us at [oli@lclark.edu](mailto:oli@lclark.edu).



OLI is pleased to present this seminar as a live webcast. Click [here](#) to register.

### **GENERAL INFORMATION:**

Just like a live seminar, you attend a webcast at a scheduled time, only you do it from a web page on your computer. Webcasts include video and audio of the speakers, slides, and seminar handout materials — all on your computer! As an additional value, all citations listed in the seminar materials will be linked via **Casemaker** to the actual cases in that library! They call this “CLE to Work” and we feel that it will help connect your CLE experience to the work on your desk.

After registration, you will be notified via email with instructions for watching the webcast. It is highly recommended that you test your computer system a few days before the webcast to make sure everything runs smoothly on your computer. Once you purchase the webcast it will appear in your online account under “Available Courses.” By clicking on the course title, you will open the webcast viewing page and a test video will be playing. You should see video and hear audio when the player page is open even before the date of the webcast. If you have difficulties with logging in or sound quality, you would call online support at 1-800-747-1719 or email [support@bizvision.com](mailto:support@bizvision.com).

You must view the webcast replay on the date it is presented to earn live credits. You have two months following the date of the original webcast to view the program. If you do not view the program on the live replay date, you will earn self-study CLE credits and not live CLE credits.

### **MATERIALS:**

Online versions of the course material are included in your webcast registration fee and will be available as PDFs for viewing, downloading or printing during and after the webcast. For two months following the program you will also continue to have access to the materials linked to case law through Casemaker!

### **No-SHOWS:**

Can't attend the live webcast? Register for the webcast and watch an archived video of the seminar at your convenience. The archived video will be available two weeks after the live webcast and you will have access for two months. A link to download and print the materials will be sent to those who fail to cancel in advance of the program. No refunds will be issued.