



**THE 21ST CENTURY LAW FIRM:
MANAGING THE PEOPLE, THE PRACTICE, AND THE MONEY**



**Joint Law Firm
Management Conference**

April 5 - 7, 2017
Radisson Blu Aqua Hotel
Chicago, Illinois

*For IADC and FDCC Members - and Anyone Else Invested
(Lawyers and Non-Lawyers) In Improving Law Firm Management*



Joint Law Firm Management Conference

THE 21ST CENTURY LAW FIRM:
MANAGING THE PEOPLE, THE PRACTICE, AND THE MONEY

PROGRAM

Wednesday, April 5, 2017

5:30 p.m. - 7:00 p.m.

Registration

5:30 p.m. - 7:00 p.m.

Welcome Cocktail Reception

Enjoy a chance to meet with managing partners and law firm administrative leaders from around the country and from firms of varying sizes in a relaxed pre-conference setting. Make long-lasting connections with your peers while exchanging thoughts on the latest issues facing our business.

Evening

Dinner on Own

Thursday, April 6, 2017

7:30 a.m. - 8:30 a.m.

Continental Breakfast

8:30 a.m. - 8:40 a.m.

Greetings and Introductions

Speakers:

Paul M. Fires, IADC Program Co-Chair, Weber Gallagher Simpson Stapleton Fires & Newby LLP, Philadelphia, PA

L. Johnson Sarber, III, FDCC Program Co-Chair, Marks Gray, PA, Jacksonville, FL

8:40 a.m. - 9:30 a.m.

The 21st Century Law Firm (Part #1) - Managing the People

Do you have a vision of your firm's millennial attorneys being a part of your succession planning? Like it or not, the world is changing, and not just on the law firm side. Clients, too, face similar issues, whether it is motivating and managing millennials, planning for succession, and most importantly, addressing overhead control in an age of increasing electronic interconnectedness. This panel will address all of these issues, with the goal of maximizing efficiencies, remaining competitive, and pairing tomorrow's successful attorneys with tomorrow's client's needs.

Moderator:

Lauren S. Curtis, Traub Lieberman Straus & Shrewsberry LLP, Saint Petersburg, FL

Speakers:

Michael Bonasso, Flaherty Sensabaugh Bonasso PLLC, Charleston, WV

Christian J. Steinmetz, III, Gannam, Gnann & Steinmetz, LLC, Savannah, GA

John C. Trimble, Lewis Wagner, LLP, Indianapolis, IN

9:30 a.m. - 10:20 a.m.

Breakout #1

Program participants share their experiences in small groups organized by firm size which will be designed to discuss and foster solutions regarding the topic presented.

Moderators:

Small: Christian J. Steinmetz, III, Gannam, Gnann & Steinmetz, LLC, Savannah, GA; **Kile T. Turner**, Norman, Wood, Kendrick & Turner, Birmingham, AL

Medium: Donna L. Burden, Burden, Hafner & Hansen, LLC, Buffalo, NY; **Larry D. Ottaway**, Foliart, Huff, Ottaway & Bottom, Oklahoma City, OK

Large: Evelyn F. Davis, Hawkins Parnell Thackston & Young LLP, Atlanta, GA; **Craig A. Marvinney**, Walter Haverfield LLP, Cleveland, OH

10:20 a.m. - 10:35 a.m.

Breakout Reports to Plenary

10:35 a.m. - 11:00 a.m.

Networking Break

11:00 a.m. - 11:50 a.m.

The 21st Century Law Firm (Part #2) - Managing the Practice

Is your practice using technology as efficiently as possible to maximize your attorney productivity and satisfy client needs as quickly and cost-effectively as possible? Is your firm paying for unnecessary office space and wasted time? Do your management models work to minimize administrative time and maximize time spent on client needs?

Experienced managing partners who have started and grown their law firms will share their expertise in making your firm run efficiently and effectively. They will address remote access to file data, telecommuting, technology and data management, and the use of outside staffing and support. Learn practical advice on how to analyze and create management models to accommodate the demands of 21st century law practice.

Moderator:

Robert L. Christie, Christie Law Group, Seattle, WA

Speakers:

Donna L. Burden, Burden, Hafner & Hansen, LLC, Buffalo, NY

Elizabeth S. Fitch, Righi Fitch Law Group, Phoenix, AZ

Park L. Priest, English, Lucas, Priest & Owsley, LLP, Bowling Green, KY

11:50 a.m. - 1:00 p.m.

Lunch and Return to Plenary

1:00 p.m. - 1:50 p.m.

Breakout #2

Program participants share their experiences in small groups organized by firm size which will be designed to discuss and foster solutions regarding the topic presented.

Moderators:

Small: **Christian J. Steinmetz, III**, Gannam, Gnann & Steinmetz, LLC, Savannah, GA; **Kile T. Turner**, Norman, Wood, Kendrick & Turner, Birmingham, AL

Medium: **Donna L. Burden**, Burden, Hafner & Hansen, LLC, Buffalo, NY; **Larry D. Ottaway**, Foliart, Huff, Ottaway & Bottom, Oklahoma City, OK

Large: **Evelyn F. Davis**, Hawkins Parnell Thackston & Young LLP, Atlanta, GA; **Craig A. Marvinney**, Walter Haverfield LLP, Cleveland, OH

1:50 p.m. - 2:05 p.m.

Breakout Reports to Plenary

2:05 p.m. - 2:55 p.m.

Avoiding Catastrophic Disruption

Business interruption comes in various formats and there are many causes for them. Whether it is weather, fire, natural disaster, terrorism, cyber theft, or other issues, this panel will be discussing situations that each have experienced, along with steps taken both before and after the interruption to facilitate a recovery and prevent interruptions in the future.

Moderator:

Paul M. Fires, Weber Gallagher Simpson Stapleton Fires & Newby, LLP, Philadelphia, PA

Speakers:

William Garcia, Liberty Mutual Group, Seattle, WA

Michael J. McGuire, Littler Mendelson, Minneapolis, MN

Brian P. Quirk, Irwin Fritchie Urquhart & Moore LLC, New Orleans, LA

2:55 p.m. - 3:20 p.m.

Networking Break

3:20 p.m. - 4:30 p.m.

When Things Go Terribly Wrong - Lessons From the Dewey LeBoeuf Scandal

As the second Dewey trial is about to ramp up, it is worth taking a look at what happened to one of the oldest and most prestigious law firms in the country. Few firms had such a storied history, with its work and influence of more than 1,000 lawyers in 26 offices around the world. Yet, the firm's demise has been called "one of the greatest law firm collapses of all time." How did such a firm go from being the most prestigious to tabloid-fodder in such a short time? More importantly, what lessons can we learn from this event that is as tragic as it is ironic? Regardless of firm size, the downfall of Dewey instructs us to be vigilant to the sacred obligations of our profession while maintaining sound business practices - and what happens when we deviate from our principals.

Speaker:

Kile T. Turner, Norman, Wood, Kendrick & Turner, Birmingham, AL

4:30 p.m. - 4:45 p.m.

Day One Wrap Up and Instructions for Later

4:45 p.m. - 6:00 p.m.

Cocktail Reception

Evening

Dinner on Own

Sign-ups for group dinner reservations will be available.

Friday, April 7, 2017

7:30 a.m. - 8:30 a.m.

Continental Breakfast

8:30 a.m. - 9:20 a.m.

The 21st Century Law Firm (Part #3) - Managing the Firm's Business

We all know that certain financial models that worked 20 years ago do not work today and certainly will not work 20 years from now. Whether it is lockstep compensation, pyramid models, attorney/staff ratios, brick and mortar expenses, partnership as a career goal, or underproductive work ethics, law firms are facing their biggest challenges yet for long term relevance and survival. The time for exceptional creativity in developing long term solutions is now. This panel will focus on modern profitability techniques for the modern insurance defense practice, while exploring strategic planning; marketing and business development; technology; succession; associate development; and fee structures.

Moderator:

William Garcia, Liberty Mutual Group, Seattle, WA

Speakers:

Brian W. Reeves, Weber Gallagher Simpson Stapleton Fires & Newby, LLP, Philadelphia, PA

John Remsen, Jr., TheRemsenGroup, Atlanta, GA

9:20 a.m. - 10:10 a.m.

Breakout #3

Program participants share their experiences in small groups organized by firm size which will be designed to discuss and foster solutions regarding the topic presented.

Small: **Christian J. Steinmetz, III**, Gannam, Gnann & Steinmetz, LLC, Savannah, GA; **Kile T. Turner**, Norman, Wood, Kendrick & Turner, Birmingham, AL

Medium: **Donna L. Burden**, Burden, Hafner & Hansen, LLC, Buffalo, NY; **Larry D. Ottaway**, Foliart, Huff, Ottaway & Bottom, Oklahoma City, OK

Large: **Lauren S. Curtis**, Traub Lieberman Straus & Shrewsbury LLP, Saint Petersburg, FL; **Craig A. Marvinney**, Walter Haverfield LLP, Cleveland, OH

10:10 a.m. - 10:25 a.m.

Breakout Reports to Plenary

10:25 a.m. - 10:50 a.m.

Networking Break

10:50 a.m. - 11:50 a.m.

The 22nd Century Law Firm - Closer Than We Think?

As we peer into the future, with technology advancing faster than our firms can keep up with, what will be some of the issues and challenges that face our firms in the near and not so near future? This panel will address the following issues that are already confronting us and will take on greater importance and relevance in the months and years ahead.

- Advances in technology which will cause law firms to transfer more of their work to counsel abroad (such as India or China) or to non-lawyers or computers.
- How third party vendors, such as Legal Zoom and other inexpensive legal providers, will cause firms to redefine themselves and their practice.
- The use of artificial intelligence to develop case strategy, write briefs, and prepare for trial.
- The advent of virtual law firms where in the interest of saving money for rent and related fees, more and more, attorneys will be working from home or at their local Starbucks.
- The role paralegals, legal assistants, and law clerks will play in the firm of the future.

Moderator:

William T. Toles, Fee, Smith, Sharp and Vitullo, Dallas, TX

Speakers:

Joseph M. Hanna, Goldberg Segalla, Buffalo, NY

James W. Harvey, Margolis Edelstein, Pittsburgh, PA

Bruno Para, Liberty Mutual, Lisle, IL

Elizabeth Haecker Ryan, Coats Rose, New Orleans, LA

11:50 a.m.

Concluding Remarks

Speakers:

Paul M. Fires, IADC Program Co-Chair, Weber Gallagher Simpson Stapleton Fires & Newby LLP, Philadelphia, PA

L. Johnson Sarber, III, FDCC Program Co-Chair, Marks Gray, PA, Jacksonville, FL

Conference Registration

Registration Fees:

	On or Before March 20, 2017	After March 20, 2017
Individual Registration	\$595	\$695
Additional Registrations from the Same Firm	\$595	\$595

The registration fee includes admission to the conference, course materials, two evening cocktail receptions, and lunch on Thursday. Registration is open to all IADC and FDCC members. Attendees who are not a member of either organization are welcome as long as their firm includes a member of either organization.

For meeting information and registration, visit www.iadclaw.org or www.thefederation.org.

CLE Credit: CLE credit has been requested from applicable states that accept law firm management education.

Hotel Reservations

Location: Radisson Blu Aqua Hotel
221 North Columbus Drive • Chicago, IL 60601
Phone: 1.312.565.5258
Reservations: 1.800.333.3333
Rate: \$269 + taxes
Hotel Deadline: March 20, 2017

To receive the group rate, you must ask for the IADC/FDCC 2017 conference rate. You may also make reservations online here: <https://www.radissonblu.com/reservation/itineraryEntrance.do?hotelCode=ILCHIAQU&promotionalCode=IADC17>

Cancellation Policy

A refund of registration fees, less \$75 and any applicable credit card fees, will be given if written notice is received by the FDCC office before the registration deadline. **No cancellations will be accepted after March 31, 2017. Substitutions are welcome.**

For More Information, Contact Co-Chairs

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1.904.398.0900

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Last Name: _____ First Name: _____

Badge: _____ Email: _____

Firm Name: _____

Address: _____

City/State/Country: _____

Zip: _____ Phone: _____ Fax: _____

Speaker: Yes No

FDCC Member: Yes No

IADC Member: Yes No

Number of attorneys in firm: _____ Number of attorneys in office: _____

State and Bar #: _____

(CLE Credits will be available for states where applicable)

Registration Fees:

	On or Before March 20, 2017	After March 20, 2017	Total
Individual Registration	\$595	\$695	
Additional Registrations from the Same Firm	\$595	\$595	
<i>Total payment included</i>			\$

Payment Information: Check -or- Visa MasterCard AmEx

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For meeting information and registration, visit www.iadclaw.org or www.thefederation.org.

Send completed registration form to:
IADC/FDCC Joint Law Firm Management Conference
275 North York Street, Suite 401 • Elmhurst, IL 60126
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