

# HANGING *your* SHINGLE

A Comprehensive  
Seminar for Building  
a Successful Legal  
Career

**LIVE PROGRAM & LIVE WEBCAST: AUGUST 18-20, 2016**

Live Program will be at the CBA-CLE Classroom • 1900 Grant St., Suite 300, Denver, CO

**PROGRAM HIGHLIGHTS:**

- Writing Your Business Plan
- What Does a Bank Want to See Before It Loans Money or Extends a Line of Credit?
- What Type of Entity Should You Choose When Starting Your Law Firm?
- All Things Accounting and Finance: From Accounts Payable to Billable Hours to Accounts Receivable
- Trust Account Management and Fee Agreements
- Key Aspects of Law Practice Management
- Manage Your Malpractice Exposure
- Malpractice Insurance
- The Practical Application of the Rules of Professional Conduct
- Practical Advice and Traps to Avoid
- Marketing and Business Development
- Technology: Your First Partner
- The Importance of Social Media in Starting Your Own Firm
- Ethics of Social Media
- Professionalism in Your Practice
- The Value of Getting a Mentor

**VIDEO REPLAYS: SEPTEMBER 14-16, 2016** • Denver, Colorado Springs, and Grand Junction

**CLE CREDITS:** Submitted for 18 General CLE Credits, Including 6.6 Ethics Credits

*This Program is an absolute*  
**MUST FOR**  
**NEW LAWYERS!**

**NEW LAWYER EDGE PARTNERS**  
**ATTEND FREE!**

**DON'T MISS THE**  
**NETWORKING**  
**RECEPTION**  
**THURSDAY EVENING**  
*Sponsored by the Colorado*  
*Bar Association Solo/Small*  
*Firm Section!*

**REGISTER FOR THIS PROGRAM ONLINE! Go to [www.cba-cle.org](http://www.cba-cle.org)**

# HANGING *your* SHINGLE:

## A Comprehensive Seminar for Building a Successful Legal Career

**F**ind out how to start, build, brand and grow your firm by attending this year's Hanging Your Shingle program. In this intensive two and a half day course, you will get the tools, information and building blocks you need to confidently open the doors to your new firm and keep them open!

Register today. Whether you are in your first five years of practice in an established firm, or whether you have decided to venture out on your own, it's time to renew your commitment to your career.

### AFTER ATTENDING, PAST PARTICIPANTS VALUED THEIR EXPERIENCE

*"One of the most useful [Seminars] I have ever attended in my 24 years in law."*

*"Practical accounting, marketing and tech advice."*

*"Thorough, comprehensive and detailed approach."*

*"Vastly exceeded my expectations."*

*"This is truly fantastic!"*

### LIVE PROGRAM & LIVE WEBCAST: **AUGUST 18-20, 2016**

At the CBA-CLE Classroom 1900 Grant St., Suite 300, Denver, CO

VIDEO REPLAYS: **SEPTEMBER 14-16, 2016**  
Denver, Colorado Springs, and Grand Junction

CLE CREDITS:  
Submitted for 18 General CLE credits,  
Including 6.6 Ethics Credits

### PROGRAM CO-CHAIRS

**David Little, Esq.\***  
Montgomery Little & Soran, PC  
Greenwood Village, CO

**Gerald Pratt, Esq.\***  
Lone Tree, CO

### FACULTY

**Fay Chu Fong, Esq.**  
Fortis Law Partners LLC  
Denver, CO

**Kelly Condon**  
Regional President  
Colorado Business Bank  
Denver, CO

**Martha J. Cusick**  
Business Development Director  
Lewis Roca Rothgerber LLP  
Denver, CO

**Carolyn Fairless, Esq.**  
Wheeler Trigg O'Donnell LLP  
Denver, CO

**David J. Graf, Esq.**  
Moeller Graf PC  
Englewood, CO

**Honorable John Leopold (ret.)**  
JAMS  
Denver, CO

**Steve Libhart**  
Legal Administrator and  
Independent Consultant to  
Small Law Firms  
Hamil Law Group LLC  
Denver, CO

**Charles Luce, Esq.**  
Moye White, LLP  
Denver, CO

**Qusair Mohamedbhai, Esq.**  
Rathod | Mohamedbhai, LLC  
Denver, CO

**Reba Nance**  
Director  
Law Practice Management/  
Risk Management  
Colorado Bar Association  
Denver, CO

**Phil Nugent, Esq.**  
Founder & Managing Director  
NCG Strategic Marketing  
Boulder, CO

**John Palmeri, Esq.**  
Gordon & Rees, LLP  
Denver, CO

**Ryann Peyton, Esq.**  
Director  
Colorado Attorney Mentoring  
Program (CAMP)  
Denver, CO

**Siddhartha Rathod, Esq.**  
Rathod | Mohamedbhai, LLC  
Denver, CO

**Katrin Miller Rothgery, Esq.**  
Colorado Supreme Court  
Office of Attorney Regulation  
Counsel  
Denver, CO

**Dustin Ruge**  
Regional Manager  
Thomson Reuters - FindLaw /  
Super Lawyers  
Scottsdale, AZ

**Ron Seigneur, CPA/ABV/CFP,  
ASA, CVA, CGMA**  
Seigneur Gustafson LLP  
Lakewood, CO

**Phil Shuey, Esq.**  
Phil J. Shuey PC  
Greenwood Village, CO

**Jay M. Tiftickjian, Esq.**  
Tiftickjian Law Firm, P.C.  
Denver, CO

**Dianne A. Van Voorhees**  
Law Office of  
Dianne A. Van Voorhees  
Broomfield, CO

*\*Also on Faculty*

**REGISTER ONLINE @ [www.cba-cle.org](http://www.cba-cle.org)**

## AGENDA • DAY ONE • THURSDAY, AUGUST 18, 2016

8:00 AM

### Registration and Continental Breakfast

8:25 AM

### Welcome and Introduction

Extended by *David Little, Esq.*, and *Gerald Pratt, Esq.*, Program Co-Chairs

8:30 - 9:10 AM

### Don't Freak Out – You Can Do This!

Sound Advice for Starting Out

Presented by *David J. Graf, Esq.*

9:10 - 10:00 AM

### Writing Your Business Plan

Presented by *Qusair Mohamedbhai, Esq.*, and *Siddhartha Rathod, Esq.*

10:00 - 10:15 AM

### Networking Break - Please Visit Our Sponsors!

10:15 - 10:45 AM

### What Does a Bank Want to See Before It Loans Money or Extends a Line of Credit?

Presented by *Kelly Condon, Regional President*

10:45 - 11:45 AM

### Choice of Entity When Forming a Business: Options; Tax Considerations; Partnership and Operating Agreements

Presented by *Fay Chu Fong, Esq.*

11:45 - 1:00 PM

### Lunch Break (On Your Own)

1:00 - 2:00 PM

### Accounting and Financial Controls Part I

- Trust vs. Operating: Account Reconciliations
- Billing and Maintaining Your Accounts Receivable
- Optimizing the Billing and Collection Cycle
- Accounts Payable: Recording, Keeping, Maintaining and IRS Requirements
- Cash vs. Accrual Accounting Methods
- Monthly Reports: Billable Hours, Accounts Receivable and Projections
- Understanding How to Read a Financial Statement
- Year-End Tasks and Responsibilities

Presented by *Steve Libhart, Legal Administrator and Independent Accountant to Small Law Firms*

2:00 - 3:00 PM

### Trust and COLTAF Accounts

Presented by *Katrin Miller Rothgery, Esq.*, Colorado Supreme Court Office of Attorney Regulation Counsel

1.2 Ethics Credit

3:00 - 3:15 PM

### Networking Break - Please Visit Our Sponsors!

3:15 - 4:15 PM

### Accounting and Financial Controls Part II

- Importance of Having a Plan
- Advantages of a Business Plan
- Advantages of Budgeting
- Financing the Start-Up Period
- Tax Considerations
- Evaluating Costs of Doing Business
- Death and Taxes
- Being an Employer and Employment Controls
- Setting Billing Rates and Billing
- Monitoring the Evolving Plan

Presented by *Ronald Seigneur, CPA/ABV/CFF ASA CVA CGMA*

4:15 PM

### Adjourn to Networking Reception

Sponsored by the Colorado Bar Association Solo/Small Firm Section

## AGENDA • DAY TWO • FRIDAY, AUGUST 19, 2016

8:30 - 10:00 AM

### Key Aspects of Law Practice Management

- Client Intake
- Scope and Objective of Representation, Unbundled Legal Services
- Fee Agreements and Engagement Letters
- Informed Consent
- File Setup, Review, Diligence
- Working With Legal and Non-Legal Support Staff
- Diaries, Calendars, Ticking, Backup
- Managing Your Time
- Bank Accounts and Ledger Systems
- Client Confidentiality
- Billing Discipline
- How to Run a Conflict Check

Presented by *Reba Nance, Director, Law Practice Management/Risk Management*, and *Katrin Miller Rothgery, Esq.*, Colorado Supreme Court Office of Attorney Regulation Counsel

.5 Ethics Credit

10:00 - 10:10 AM

### Networking Break - Please Visit Our Sponsors!

10:10 - 11:00 AM

### Malpractice Insurance, Including Cyber Insurance

A Very Unique Kind of Coverage

Presented by *Carolyn Fairless, Esq.*

1 Ethics Credit

11:00 AM - 11:50 AM

### Managing Your Malpractice Exposure

- Attorney/Client Relationship
- Identifying the Client
- Duties to Clients and Non-clients
- Avoiding or Limiting Liability
- Malpractice Exposures
- Risk Management

Presented by *John Palmeri, Esq.*

1 Ethics Credit

11:50 AM - 1:00 PM

### Networking Lunch (Box Lunch Included in Your Tuition)

1:00 - 2:00 PM

### Rules of Professional Conduct

Practical Application

Presented by *David Little, Esq.*

1.2 Ethics Credit

2:00 - 3:00 PM

### Technology: Your First Partner

- What Will You Need, What Does It Cost and ROI?
- Defining Your Needs in Relation to Your Skills, Budget, Practice and Firm Size
- Key Hardware and Software for Managing a Successful Practice, Including When to Use Smartphones, Tablets, Hybrids and Notebook Computers
- Is the Cloud Just for Rainy Days?
- Dealing with the Software Merry-Go-Round
- Selecting Case Management and Analysis, Timekeeping and Billing Software
- CRPC 1.5: Ethical Issues When Billing
- E-Filing in the ICCES World
- CRPC 7.1 – 5: Establishing a Web Presence
- CRPC 7.1 – 7.5 – Practicing Ethically in a Digital World
- Do's and Don'ts of Dealing with Metadata – CBA Ethics Opinion 119

Presented by *Phil Shuey, Esq.*

3:00 - 3:15 PM

### Networking Break - Please Visit Our Sponsors!

3:15 - 3:30 PM

### The Importance of Finding a Mentor and What CAMP Has to Offer

Presented by *Ryann Peyton, Esq., Director, Colorado Attorney Mentoring Program (CAMP)*

3:30 - 5:00 PM

### From the Trenches: A Panel Presentation of Practical Advice and Traps to Avoid

Presented by *David Graf, Esq., Qusair Mohamedbhai, Esq., Siddhartha Rathod, Esq., Jay Tiftickjian, Esq., and Dianne Van Voorhees, Esq.*  
Moderator: *Gerald Pratt, Esq., Program Co-Chair*

5:00 PM

Adjourn

## AGENDA • DAY THREE • SATURDAY, AUGUST 20, 2016

9:00 - 10:00 AM – NO CLE CREDIT OFFERED FOR THIS SEGMENT

### Marketing and Business Development for Small and Solo Firms

- Differences Between Marketing and Business Development and What Each One Does
- What's in a Marketing/Business Development Plan and How Do You Create It?
- Steps to Crafting an Actionable Marketing and Business Development Plan
- Must Haves in Solo Marketing/Business Development Plans – Focus on Essential Tactics Like Website, e-Marketing, Basics of Social Media (Focus on LinkedIn for Lawyers)

Presented by *Martha J. Cusick, Business Development Director, and Phil Nugent, Esq., Founder and Managing Director*

10:00 - 10:10 AM

### Networking Break - Please Visit Our Sponsors!

10:10 - 11:00 AM – NO CLE CREDIT OFFERED FOR THIS SEGMENT

### The Importance of Social Media in Starting Your Own Firm

- How Blogs and Social Media Work for Attorneys
- How to Create a Successful Social Media Strategy for Your Practice
- Social Media Best Practices
- How to Use Social Media to Build Your Referral Networks

Presented by *Dustin Ruge, Regional Manager*

11:00 AM - 12:00 PM

### Ethics of Social Media

- Confidentiality, Competency and the Cloud
- Marketing Through Social Media
- Really Dumb Things Lawyers (and Judges) Do on Social Media
- Online Attorney Referral Services

Presented by *Charles Luce, Esq.*

1.2 Ethics Credit

12:00 - 12:40 PM

### Professionalism in Your Practice

Presented by *Honorable John Leopold (ret.)*

.5 Ethics Credit

12:40 PM

Adjourn

## 2016 CONFERENCE SPONSORS:



Sponsorship opportunities are still available! For more information, please contact **Melissa Higham** at [mhigham@cobar.org](mailto:mhigham@cobar.org).

# HANGING your SHINGLE: A Comprehensive Seminar for Building a Successful Legal Career

## PROGRAM ORDER FORM

### STEP 1: LIVE PROGRAM, LIVE WEBCAST OR VIDEO REPLAY

**LIVE: AUGUST 18-20, 2016** (select between live program and live webcast)

- Live Program** - Denver: CBA-CLE Classroom, 1900 Grant St., Suite 300 (LP081816L)  
 **Live Webcast** - Direct to your desktop (LP081816W)

**VIDEO REPLAY: SEPTEMBER 14-16, 2016**

- Denver:** CBA-CLE Classroom, 1900 Grant Street, Suite 300 (LP081816V)  
 **Colorado Springs:** 421 S. Tejon Street, Suite 100 (LP081816VCS)  
 **Grand Junction:** 1250 E. Sherwood Drive (LP081816VGJ)

### STEP 2: REGISTRATION CATEGORIES

**INDIVIDUAL TUITION:** (price is the same for live program, live webcast, and video replay)

- Non-member: .....\$379  
 CBA Member: .....\$329  
 Solo/Small Firm Section Member: .....\$279  
 **CLE Elite Pass Holders:**.....\$99  
 **New Lawyer Edge Partner:** .....FREE

### STEP 3: COURSE MATERIALS

(please select between materials download or printed book)

- Materials Download** (PDF - delivered via email 24-48 hours prior to seminar)  
 **Printed Book** (pick up at seminar)

### STEP 4: LUNCH & NETWORKING RECEPTION SELECTIONS

- YES** - I will attend the networking reception after the program on Thursday  
 **NO** - I will not attend the networking reception after the program on Thursday  
 **YES** - Please order a lunch for me for the Friday lunch session  
 **NO** - I do not want a lunch for the Friday lunch session

**PROGRAM ORDER FORM TOTAL \$** \_\_\_\_\_

(if no Friday lunch purchased, please only include tuition total)

## HOMESTUDY ORDER FORM

To receive CLE Credit you must purchase both the course materials AND the recorded seminar. Materials will be mailed to you approximately 2 weeks after live program.

### STEP 1 - SELECT DESIRED PRODUCT FORMAT:

- Video-On-Demand** (LP081816N)  
 **MP3 Audio Download** (LP081816J)  
 **Paper course materials & recorded homestudy on CD-Rom** (LP081816D)

### STEP 2 - SELECT PAYMENT CATEGORY:

- Non-member: .....\$379  
 CBA Member: .....\$329  
 **Elite CLE Pass Holder** (MP3 and VOD ONLY):.....FREE  
 **Basic CLE Pass Holder:** (MP3 and VOD ONLY) .....FREE  
 **New Lawyer Edge Partner:** (MP3 and VOD ONLY) .....FREE

**NOTE:** Step 3 is for course materials only purchases. Skip this if you purchased the HOMESTUDY.

### STEP 3 - COURSE MATERIALS ONLY: (Paper Only - LP081816C)

- Non-member: \$159                       CBA Member: \$129

*NOTE: Shipping & handling only applies to orders you receive via mail.*

Price \$ \_\_\_\_\_  
 Shipping & Handling \$ 10.95  
 Subtotal \$ \_\_\_\_\_

Applicable Sales Tax (7.62% Denver, 4% RTD and 2.9% rest of Colo.) \$ \_\_\_\_\_

**HOMESTUDY ORDER FORM TOTAL \$** \_\_\_\_\_

**CLE USE ONLY:** Check #: \_\_\_\_\_ Approval #: \_\_\_\_\_



**Register by PHONE ...** when using VISA, MasterCard or AmEx.  
 (303) 860-0608 • Toll-Free: (888) 860-2531



**Or FAX form to ...** when using VISA, MasterCard or AmEx.  
 FAX to: (303) 860-0624



**Or MAIL form to ...**  
 CBA-CLE, 1900 Grant St., Suite 300, Denver, CO 80203-4303



**Or Register ONLINE ...** when using VISA, MasterCard or AmEx.  
 Register @ [www.cba-cle.org](http://www.cba-cle.org)

Name(s) \_\_\_\_\_

Attorney Reg. No. \_\_\_\_\_

Firm/Organization \_\_\_\_\_

E-Mail Address \_\_\_\_\_

Street Address \_\_\_\_\_

City / State / Zip \_\_\_\_\_

Telephone (            ) \_\_\_\_\_

**PAYMENT METHOD:** All registrations must include a check or charge card information.

Check made payable to **CBA-CLE** (Check # \_\_\_\_\_)

VISA     MasterCard     AmEx

Credit Card # \_\_\_\_\_

Exp. Date \_\_\_\_\_

Signature (required) \_\_\_\_\_

**The CBA-CLE Pass: The Smart Thing To Do!**  
**ARE YOU AN ELITE PASS HOLDER?**  
**Attend this program for ONLY \$99!**



**INTRODUCING ...**  
**New Lawyer Edge**



**New Lawyer Edge is a 3-year CLE program for new lawyers in the first 5 years of practice.**

Includes unlimited free "Build Your Practice" live CLE Seminars, discounts on all other CLE programs, free "Build Your Practice" homestudies, discounts on all other homestudies, discounts on CLE Books, networking opportunities, and additional resources to help you in your law practice.

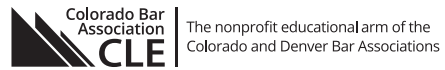
**PRICING: \$199 for CBA Members | \$299 for Non-Members**

For more details go to: <http://cba-cle.org/NewLawyer/Edge>

**New Lawyer Edge Partners attend this program for FREE!**

# HANGING *your* SHINGLE: A Comprehensive Seminar for Building a Successful Legal Career

Sponsored by the Lawyer's Professional Liability Committee and  
the Solo/Small Firm Section of the Colorado Bar Association



The nonprofit educational arm of the  
Colorado and Denver Bar Associations

1900 Grant Street, Suite 300, Denver, Colorado 80203-4303

Nonprofit Org.  
U.S. Postage Paid  
Permit No. 1638  
Denver, CO

LIVE PROGRAM & LIVE WEBCAST:  
**AUGUST 18-20, 2016**

Live Program will be at the CBA-CLE Classroom  
1900 Grant St., Suite 300 • Denver, CO

**16TH  
ANNUAL  
PROGRAM!**

Submitted for 18 General CLE Credits, Including 6.6 Ethics Credits

**REGISTER ONLINE! Go to [www.cba-cle.org](http://www.cba-cle.org)**



Sponsored by the Lawyer's Professional Liability Committee and  
the Solo/Small Firm Section of the Colorado Bar Association

# HANGING *your* SHINGLE

A Comprehensive  
Seminar for Building  
a Successful Legal  
Career

**16TH  
ANNUAL  
PROGRAM!**

LIVE PROGRAM & LIVE WEBCAST: **AUGUST 18-20, 2016**

Live Program will be at the CBA-CLE Classroom • 1900 Grant St., Suite 300, Denver, CO

**REGISTER ONLINE! Go to [www.cba-cle.org](http://www.cba-cle.org)**