

IN-PERSON

SEPT. 27-29, 2024

2024 Solo and Small Firm Conference

LOOKING BACK TO MOVE FORWARD

Clearwater Casino Resort in Suquamish

Come early on Friday, from
10 a.m. – noon to attend one of the
FREE pre-conference sessions!

**YOU CAN JOIN THE
MASTERMIND SESSION
OR
YOU CAN JOIN THE
START-UP BOOTCAMP**

*Earn an additional 2.0
CLE credits (including
1.0 Law & Legal credit
and 1.0 Other credit) for
a total of 14.25 credits
at no extra charge.*

WSBA | CLE Invested in your success.™

2024 Solo and Small Firm Conference

LOOKING BACK TO MOVE FORWARD

Clearwater Casino Resort in Suquamish



Join other solo or small firm practitioners at the 19th annual Solo and Small Firm Conference on Sept. 27-29, 2024! The theme this year is “Looking Back to Move Forward”. Co-sponsored with the Solo & Small Practice Section, this program has been thoughtfully designed to include presentations by industry experts on a variety of topics to help you feel more confident and up-to-date in the management of your practice! Offering 12.25 total CLE credits, this terrific program provides not just valuable business-related tips, but also an opportunity to network face-to-face with attorneys from around the state!

Come early on Friday, September 27, from 10 a.m. – noon to attend one of the pre-conference sessions! [Learn more on page 4](#)

2024 WSBA Solo and Small Firm Conference

LOOKING BACK TO MOVE FORWARD

Clearwater Casino Resort in Suquamish

WSBA CLE – #2455MSUQ & #2455BSUQ

IN-PERSON

DATES: Friday, Sept. 27 - Sunday, Sept. 29, 2024

12.25 CLE CREDITS:	L&LP	Ethics	Other
MSUQ: Looking Back to Move Forward – plus the Mastermind session	0	2.5/1.0	8.75
BSUQ: Looking Back to Move Forward – plus the Start-up Bootcamp (14.25 credits total)	+1.0	2.5/1.0	8.75 +1.0
		Early Bird Pricing valid thru 8/9/24	Regular Pricing valid from 8/10/24
TUITION:			
<u>WSBA Solo & Small Practice Section</u> Members		\$300	\$325
Standard/Non-Section Members		\$335	\$360
Join the Section (\$35) and register at the Section member rate		\$335	\$360
New Members*		\$240	\$265

Presented in collaboration with the WSBA Solo & Small Practice Section

PLANNING COMMITTEE:

- **Michael Cherry** – Lexquiro, Bellevue
- **Ann Guinn** – G & P Associates, Reno, NV
- **Darcel Lobo** – DAL Coaching & Consulting, Normandy Park
- **Kari Petrasek** – Petrasek Law PLLC, Mukilteo
- **Alison Sheets** – Sheets Law, Mukilteo

REGISTRATION - ONLINE:

MSUQ: The 2024 WSBA Solo and Small Firm Conference: Looking Back to Move Forward – plus the Mastermind pre-conference session

BSUQ: The 2024 WSBA Solo and Small Firm Conference: Looking Back to Move Forward – plus the Start-up Bootcamp

VENUE:

Clearwater Casino Resort
 15347 Suquamish Way NE
 Suquamish, WA 98392-9649
 (360) 598-8700
clearwatercasino.com

*New Members who have been admitted to practice in Washington for fewer than five years are eligible to receive the new member tuition.

Attend One of Our Pre-Conference Sessions!

Join the Mastermind Session

How would you like to brainstorm ideas with other solo and small firm attorneys who have experience in your journey as a law firm owner? Come join us for a pre-conference mastermind session with other like-minded attorneys. You will have the opportunity to have your obstacles heard, analyzed, and solved by fellow colleagues who have been there and have figured out solutions to the very problem you're facing. Even though we may be solo and small firm owners, we don't have to run our law firms in isolation. Come join our mastermind session with the biggest law firm marketing or law firm management obstacle you're facing. You'll leave the mastermind with a specific action plan to resolve your marketing or management obstacles.

- Attorney and coach, Darcel Lobo, from the Solo & Small Practice Section will host a two-hour Mastermind session open to a maximum of 6 solo/small firm owners (owners of a legal practice with no more than 10 licensed legal professionals). Please note that due to the confidential nature of this workshop, it will not be accredited or recorded.

OR YOU CAN

Join the Start-up Bootcamp

Earn an additional 1.0 L&LP + 1.0 Other credits for a total of 14.25 credits at no extra charge.

In the Bootcamp you will have the opportunity to:

- Consider whether solo practice is right for you.
- Gain clarity of your first steps to get going (including what hazards you may encounter!).
- Dive into a hands-on application to take with you.
- Meet others, so you aren't alone!

PLEASE NOTE: A buffet lunch will be provided Friday and Saturday. Please contact cle@wsba.org if you have any dietary restrictions or concerns.

A Special Thank You to Our Sponsor!



WSBA IN-PERSON MEETINGS & EVENTS:

WSBA will follow the COVID-19 guidance provided at the CDC website: [How to Protect Yourself and Others](#). If state or local health authorities impose stricter requirements than the CDC, WSBA will comply with the state or local requirements in the area in which the event is held.

For more information on COVID-19 Prevention Actions from the CDC, see [How to Protect Yourself and Others | CDC](#).



Lodging Information

There is a block of discounted rooms at the Suquamish Clearwater Casino Resort held for attendees until August 26, 2024, based entirely on space availability. Use group ID: 22924 when making your reservation. Once they are filled, room prices may increase. Room reservations made under the WSBA room block are intended for attendees of the Solo and Small Firm Conference only. If a non-attendee would like to stay in the area, please find accommodations outside of the WSBA room block.

ONLINE > Go to <https://reserve.clearwatercasino.com/suquamish#groupSignIn> and enter Group ID 22924
PHONE > You may also call 866-609-8700 using Group ID 22924

TO RESERVE YOUR ROOM

The WSBA room block is for Friday and Saturday nights, September 27 and 28, at the following nightly rates for either a Double Double or King Room (plus taxes/fees and subject to the hotel's reservation policy):

\$199 - Resort Water View King or Queen/Queen
\$214 - Triple Occupancy
\$229 - Quad Occupancy
\$169 - Resort Non-View King or Queen/Queen
\$169 - Tower King or Queen/Queen
\$184 - Triple Occupancy
\$199 - Quad Occupancy



RECORDING WILL BE AVAILABLE ONLINE

We look forward to being together in person and hope you can be a part of it. As always, if you are unable to join us, the 2024 Conference will be recorded and available for purchase from the WSBA CLE store at a later date. If you have health and safety concerns related to attending the Solo and Small Firm Conference in person, please email us at: cle@wsba.org.

DAY 1 > FRIDAY, SEPT. 27, 2024

9:30 a.m. > Check-in • Walk-in Registration • Morning Refreshments

10 a.m. >

Bootcamp: Starting a Solo/Small Firm

120 minutes, 1.0 credits L&LP, 1.0 Other

WHALE HALL > In this session, you will have the opportunity to:

- Consider whether solo practice is right for you.
 - Gain clarity of your first steps to get going (including what hazards you may encounter!).
 - Identify and respond to the fears that are holding you back from going solo.
 - Meet others, so you aren't alone!
- **Julie Fowler** - *Law Office of Julie K. Fowler, P.S., Bellevue*
 - **Kristina Larry** - *Sassy Litigations, Seattle*
 - **Alison Sheets** - *Sheets Law, Mukilteo*

10 a.m. >

Mastermind Session with Darcel Lobo

120 minutes, not accredited

How would you like to brainstorm ideas with other solo and small firm attorneys who have experience in your journey as a law firm owner? Come join us for a pre-conference mastermind session with other like-minded attorneys. You will have the opportunity to have your obstacles heard, analyzed, and solved by fellow colleagues who have been there and have figured out solutions to the very problem you're facing. [Learn more about this session on page 4.](#)

- **Darcel Lobo** - *DAL Coaching & Consulting, Normandy Park*

Noon > Lunch and Section's Annual Membership Meeting / Salmon Hall

1 p.m. > Welcome and Introductions / Whale Hall

- **Sunitha Anjilvel** - *Anjilvel Law Group, Redmond*
- **Ann Guinn** - *G & P Associates, Reno, NV*
- **Darcel Lobo** - *DAL Coaching & Consulting, Normandy Park*

1:15 p.m. > Plenary Session - Looking Back to Move Forward

75 minutes, 1.25 credits Other

WHALE HALL > We've all heard the adage "Those who cannot remember the past are condemned to repeat it." That certainly holds true in business. There are valuable lessons to be learned from past business decisions and performance if you'll just tap into them. This presentation will help you analyze the metrics and strategies from your firm's past to help guide your practice to new levels of productivity, client satisfaction, and profitability in the future.

- **Ann Guinn** - *G & P Associates, Reno, NV*

(DAY 1 CONTINUED NEXT PAGE)

DAY 1 > FRIDAY, SEPT. 27, 2024

2:30 p.m. > Plenary Session - The Why and How of Creating a Vision for Your Law Practice

45 minutes, 0.75 credit Other

WHALE HALL > When new attorneys ask me for advice on whether they should start their own practice, I typically ask them if they want to own a business or if they want to practice law. Although part of being a solo or small practice is the practice of law, half of what we do is running a business. And every business needs a plan, also known as a vision. Otherwise, we're just wandering aimlessly in the dark. During this session, we will go over how a vision helps you, how it evolves, and how to create one of your own.

- **Shreya Ley** - *Layroots, LLC, Seattle*

3:15 p.m. > Break & Refreshments

Enjoy afternoon refreshments and meet with vendors for 30 minutes in Salmon Hall

3:45 p.m. > Plenary Session - Flying Solo: 30 Things Every Solo, Small Firm, or Rural Attorney Needs to Know

90 minutes, 1.5 credits Ethics

WHALE HALL > Feeling unsure about your legal practice? No worries! This course will teach you to soar by covering everything you need to know to protect yourself and your clients from potential malpractice claims. Using a 30-item checklist as the presentation backdrop, this program will highlight common malpractice and ethical concerns solo, small firm, and rural lawyers face and share practical tips lawyers can use to responsibly address the concerns identified. From client communication to document management, ethical considerations to risk mitigation, this course will empower you to navigate your solo law practice with confidence and professionalism.

- **Mark Bassingthwaighe** - *ALPS Insurance, Saint Cloud, FL*

5:15 p.m. > Complete online evaluations • Adjourn

5:15 - 6:15 p.m. > Reception in Salmon Hall

6:15 p.m. > Dine Around

DAY 2 > SATURDAY, SEPT. 28, 2024

8:15 a.m. > Check-in • Walk-in Registration • Morning Refreshments

8:45 a.m. > Welcome and Review of Day 1 Highlights / Whale Hall

- **Ann Guinn** – *G & P Associates, Reno, NV*

9 a.m. >

Using Microsoft Copilot in Your Law Practice

45 minutes, 0.75 credit Other

WHALE HALL > In this session we'll talk about what Copilot is and how you can use it to be more efficient and productive. We'll talk about how it works, point out some things to watch out for, and give tips on how you can use it in Word, PowerPoint, Excel, Outlook, OneNote and more.

- **Ben Schorr** – *Microsoft, Redmond*

9 a.m. >

How to Help Your Paralegal Succeed

45 minutes, 0.75 credit Other

DEER HALL > Hear from current and former paralegals about what helped them in various jobs to be their best. What did employers do to encourage them and support them? What could employers have done better? What suggestions do they have for employers to take full advantage of their paralegal's skills?

- **Commissioner Susan Harness** – *Snohomish County Superior Court, Everett*
- **Kyla Reynolds** – *Amazon, Seattle*

9:50 a.m. >

Best Management Practices

45 minutes, 0.75 credit Other

WHALE HALL > Two old pros and a young one share best practice management tips from a combined 100+ years of experience in law firms! You'll learn what works for them, as well as hear about the "good" ideas that were tried — and failed. This presentation offers a treasure trove of solid advice to help you strengthen your practice while sidestepping the "trial and error" phase of implementing new ideas. Your practice will thank you for attending!

- **Bruce Gardiner** – *The Gardiner Law Firm, Kirkland*
- **Ann Guinn** – *G & P Associates, Reno, NV*
- **Nick Pleasants** – *Oseran Hahn PS, Bellevue*

9:50 a.m. >

Working for You and Your Business

45 minutes, 0.75 credit Other

DEER HALL > This session is designed to help small-business owners understand the financial strategies and tools available to help run their business more effectively.

Topics include:

- Various banking, retirement plan and insurance options
- Valuable strategies that can help you create value outside your business
- Strategies for building and preserving your business
- **Randy Robichaud** – *Edward Jones, Mukilteo*

(DAY 2 CONTINUED NEXT PAGE)

DAY 2 > SATURDAY, SEPT. 28, 2024

10:35 a.m. > Break in Salmon Hall

11 a.m. > A.I. & Emerging Technologies and Their Implications for the Judiciary and Legal Profession

60 minutes, 1.0 credit Other

WHALE HALL > Presentation will cover developments in artificial intelligence and associated technologies and potential implications they hold for the judiciary and the legal profession.

- **Judge Sean O'Donnell** - *King County Superior Court, Seattle*

Noon > Lunch in Salmon Hall

1 p.m. >

What To Do with Your Law Degree When You No Longer Want to Practice Law

45 minutes, 0.75 credit Other

WHALE HALL > Everyone tells you, "You can do anything with a law degree!" But few of those people have law degrees and an even smaller number have ever tried to "do anything with a law degree." This presentation will feature three law school graduates who have not only found their way out of the formal practice of law but who also have a lot of passion around helping lawyers to find a role that suits them. While you can't do anything with a law degree (brain surgery and rocket science are probably out without a great deal of additional training!) Shawn, Dan, and Allie will share their stories and best practices about how to transition out of law practice and provide concrete steps you can take to explore your options outside of law.

- **Allie Sisson Erstad** - *Seattle University School of Law, Seattle*
- **Daniel Lear** - *InfoTrack, Seattle*
- **Shawn Lipton** - *The Trusted Coach, Seattle*

1 p.m. >

Do I Really Need a Business Plan?

45 minutes, 0.75 credit Other

DEER HALL > Well planned businesses are more profitable, easier to run, and easier to market. After a quick diagnostic on whether your law practice could use a business plan, you will see an example of a plan summary. Isolating the hardest component for law firms to perfect, you will learn, through a few examples and discussion, more about how to design your firm and integrate the components.

- **Aaron V Rocke** - *Rocke Law Group PLLC, Seattle*

(DAY 2 CONTINUED NEXT PAGE)

DAY 2 > SATURDAY, SEPT. 28, 2024

1:50 p.m. >

Secure Your Firm's Future: Succession Planning Essentials

60 minutes, 1.0 credit Other

WHALE HALL > Join us for an engaging session on safeguarding your legal practice. Learn about contingency plans, knowledge transfer, and ethical considerations, all vital for a successful transition.

- **Margeaux Green** - *Washington State Bar Association, Seattle*

1:50 p.m. >

How To Improve Your Intake Process and Increase Conversion

60 minutes, 1.0 credit Other

DEER HALL > This session will be a hands-on workshop where attendees will walk away with a new and improved intake process for their law firm. This is a great workshop for lawyers who are looking to open their own law firm and want help building out their intake process, or for existing law firm owners who recognize that their intake process could use some tweaks.

- **Darcel Lobo** - *DAL Coaching & Consulting, Normandy Park*

2:50 p.m. > Break

3:10 p.m. > Plenary Session – Stress Management/Mindful Life

45 minutes, 0.75 credit Other

WHALE HALL > The law is a relational profession that brings us into daily contact with stressful conditions and intense relationships. This session will explore strategies and techniques that can help build resilience and maintain equanimity in day-to-day legal practice.

- **Dr. William Vesneski** - *University of Washington*

3:55 p.m. > Plenary Session – Judge's Panel DEI:
Not Just a Buzz Phrase or Afterthought

60 minutes, 1.0 credit Equity Ethics

WHALE HALL > Learn how your work, not just what you do but how you do it, can reflect diversity, equity and inclusion at all levels of court. Judges from the courts of limited jurisdiction, superior court and the court of appeals will share thoughts on courtroom conduct, making GR 37 challenges, and language choices in pleadings and briefs.

- **Judge Linda Coburn** - *Court of Appeals - Div I, Seattle*
- **Judge Tracy Flood** - *Bremerton Municipal Court, Bremerton*
- **Judge Whitney Rivera** - *Snohomish County Superior Court, Everett*

4:55 p.m. > Adjourn

DAY 3 > SUNDAY, SEPT. 29, 2024

8:30 a.m. > Check-in • Walk-in Registration • Morning Refreshments

9 a.m. > Plenary Session - Effective Marketing for the Small Firm

60 minutes, 1.0 credit, Other

WHALE HALL > It's competitive out there! The good news is that there are a variety of ways small firms can compete without trying to outspend their larger competitors. In this session, we'll explore the most effective ways small firms are winning clients in competitive markets. From budgeting and planning to execution, we'll cover full funnel strategies and tactics that work to help you achieve your growth objectives.

- **Gyi Tsakalakis** - *Attorneysync, Chicago, IL*

10 a.m. > Plenary Session - Protecting Yourself and Your Clients: Best Practices for Documenting the Client Relationship and the Ethics of Retaining Client Files

45 minutes, 0.75 Ethics

WHALE HALL > Two Disciplinary Counsel will take you through some questions to ask when you first meet with clients, and discuss how the Rules of Professional Conduct and Advisory Opinions may apply. They will also discuss your professional obligations related to turning over client files.

- **Kathy Jo Blake** - *Washington State Bar Association, Seattle*
- **Erica Temple** - *Washington State Bar Association, Seattle*

10:45 a.m. > Break

11 a.m. > Plenary Session - Malpractice Missteps

60 minutes, 1.0 credit Ethics

WHALE HALL > This presentation will address lawyer professional liability insurance issues, the frequency of malpractice claims by area of law and by type of activity and type of error, an outline of the law of lawyer liability, and suggestions for reducing the risk of malpractice claims.

- **Mark Johnson** - *Johnson Flora Sprangers PLLC, Seattle*

Noon > Conference Closing Remarks / Whale Hall

12:10 p.m. > Complete evaluations • Adjourn

REGISTRATION

ONLINE > Go to www.wsba.org and enter **24555** in the search box. Payment by credit card.

PHONE > Call **800-945-9722** or **206-443-9722** with credit card and registration/order form in hand. Our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions.

MAIL > Please fill out this registration form and mail to WSBA seven business days prior to the program along with your check payable to WSBA. Credit card payments by mail or fax are no longer accepted.

Name: _____ WSBA #: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: () _____ Email: _____

Please omit my name from the networking list made available to exhibitors and/or attendees.

Registrations received less than 48 hours before a seminar are not guaranteed a coursebook or other presentation materials on-site. If special accommodations are needed, please email cle@wsba.org or call toll-free at **800-945-9722**.

PRICING AND PAYMENT

MASTERMIND SESSION

#24555MSUQ, attend in Suquamish, WA
9/27/24 through 9/29/24

START-UP BOOTCAMP

#24555BSUQ, attend in Suquamish, WA
9/27/24 through 9/29/24

	Early Bird Pricing valid thru 8/9/24	Regular Pricing valid from 8/10/24	
SELECT PRICE	<input type="radio"/> \$300	<input type="radio"/> \$325	Solo & Small Practice Section Members
	<input type="radio"/> \$335	<input type="radio"/> \$360	Standard/Non-Section Members
	<input type="radio"/> \$335	<input type="radio"/> \$360	Join the Section (\$35) and register at the Section member rate (\$325)
	<input type="radio"/> \$240	<input type="radio"/> \$265	New Members*

*New Members who have been admitted to practice in Washington for fewer than five years are eligible to receive the new member tuition. Note: The store will automatically discount your registration during checkout.

Registration Transfers, Refunds & Cancellations:

In most circumstances, if you cannot attend the live event, we can transfer your registration to the on-demand product, once available (8-10 weeks from the program delivery date). For in-person registrations, tuition fees may be refunded, less \$25 for processing, for written cancellations postmarked, emailed, or faxed by 5 p.m. up to three business days before the event. No refunds will be provided after the dates specified. You may also send a substitute in lieu of canceling. When applicable, specific exceptions to these policies will be noted on individual event registration pages. Please email cle@wsba.org with any requests or questions.

Check enclosed, payable to "WSBA" for the amount of _____

MAIL TO: Washington State Bar Association, 1325 Fourth Ave, Suite 600, Seattle, WA 98101-2539

OFFICE USE ONLY Date _____ Check # _____ Total _____