Professionalism for New Attorneys (PNA)

The final step toward starting your new career!

SUMMARY  Once you pass the North Carolina State Bar examination, NC State Bar rules require you to take the Professionalism for New Attorneys (PNA) course from an approved provider.

The North Carolina Bar Association’s PNA program is a mandatory two-day, 12-hour continuing legal education (CLE) program designed to give newly licensed attorneys a greater understanding of law practice management, trust accounts, NC State Bar rules and requirements, professionalism and ethics, and the grievance process.

The majority of new North Carolina attorneys have met their PNA requirement with this North Carolina Bar Association course.

TWO-DAY LIVE OPTION
Tuesday–Wednesday, May 23–24 2017
Live at the NC Bar Center, Cary

CLE CREDIT: 12.0 Hours
Includes 11.0 Hours Ethics/Professional Responsibility and 1.0 Hour Substance Abuse/Mental Health

LIVE and WEBCAST OPTION
Tuesday, May 23, 2017, Webcast
Wednesday, May 24, 2017, Live at the NC Bar Center, Cary

BONUS: All attendees receive a FREE copy of the e-publication, ABC’s of Traffic Law: Do’s and Don’ts of Traffic Court by Chad Garrett.

The North Carolina Bar Association Foundation is accredited by the North Carolina State Bar as a provider of continuing legal education.
Professionalism for New Attorneys (PNA)  |  May 23–24, 2017

PNA TUITION AND REGISTRATION
Complete your PNA requirement in two days consecutively at the NC Bar Center or, for your convenience, take the first day by Webcast and then join us at the NC Bar Center for the second day. To help us plan accordingly, please register no less than one week in advance. Details are available online at www.tinyurl.com/Spring17PNA.

Your CLE tuition includes mandatory State Bar fees. These fees are used to administer the State Bar’s Mandatory Continuing Legal Education program and to support both the Chief Justice’s Commission on Professionalism and the Chief Justice’s Equal Access to Justice Commission. Your tuition also includes access to digital program materials and a FREE copy of the e-publication, ABC’s of Traffic Law: Do’s and Don’ts of Traffic Court by Chad Garrett.

FOUR WAYS TO REGISTER
ONLINE* www.tinyurl.com/Spring17PNA  •  PHONE* 800.228.3402  •  FAX* 919.677.1774
MAIL** Attn: Accounting, NCBA Foundation, P.O. Box 3688, Cary, NC 27519-3688
*Credit cards only.  **Please make checks payable to the NCBA Foundation.

PROGRAM OPTIONS
(Choose one.)
☐ Live Two-Day Option  (#613PNA)
Live, Cary, NC Bar Center  |  Tuesday–Wednesday, May 23–24, 2017

☐ Live and Webcast Two-Day Option  (#613LWC)
Day 1: Webcast  |  Tuesday, May 23, 2017
Day 2: Live, Cary, NC Bar Center  |  Wednesday, May 24, 2017

☐ Video Replay Two-Day Options  |  Cary, NC Bar Center
Tuesday–Wednesday, August 29–30, 2017 (#613BAR)

☐ Video Replay Two-Day Options  |  Charlotte, Hampton Inn & Suites SouthPark
Monday–Tuesday, August 14–15, 2017  (#613CHA)

NOTE: Both days of the PNA course must be completed by 12/31/17 for those who passed the July 2016 or the February 2017 North Carolina State Bar exam.

TUITION (Choose one.)
☐ Newly Licensed NC Attorney 2016-17: $235
☐ Established Attorney: $460

FREE NCBA MEMBERSHIP
Program participants who join the NCBA will enjoy membership benefits through June 2018.
☐ First year licensed to practice and one section membership (including attorneys licensed by exam, comity in North Carolina or attorneys licensed for the first time ever by exam in any state in 2016 or 2017)

Indicate desired NCBA Section: ________________________________________________________________
☐ Send me information on the NCBA’s Sections.

REGISTRANT INFORMATION  |  Please print clearly.

Print Full Name: ___________________________  613PNA=B
Firm/Organization Name: ___________________________
Address: _____________________________________
City, State and ZIP: ____________________________
Daytime Phone Number: _________________________
Email Address: ________________________________
NC State Bar No. (Required for MCLE Credit): __________________

PAYMENT  |  Registration is processed only after payment is received. Please print clearly.
☐ Enclosed is a check, payable to the NCBA Foundation.  ☐ Please charge my credit card.
Card Number: _________________________________  Expiration Date: ____________
Signature: ______________________________________
Tuesday, May 23, 2017, 8:25a–4:30p

ETHICS AND PROFESSIONALISM

8:25a Registration

8:55 Welcome and Introductions
Leah M. Hermiller
Gain insight into your day and understand why the PNA program was created and is required for new lawyers and lawyers who are new to North Carolina (or have practiced law five years or less).

9:00 Dealing with the Courts
Janet Ward Black
Start your day off with this highly engaging session and hear practical tips that will positively influence your presence in the courts.
- Courtroom decorum
- Rule 11
- Local rules of court
- Truth to all: Court, opposing counsel, opposing parties, witnesses (Rule 3.3)
- Disclose contrary authority
- Do not advocate untenable positions
- Do not waste the court’s time
- In all things dealing with practicing law, “Just because you can, doesn’t mean you should.”
- Setting realistic goals

10:00 Ethics and Grievance Committees
Deanna S. Brocker and Douglas J. Brocker
- Understand the committees’ processes and results
- Gain insight into statistics on the most frequent grievances

11:00 Break and Book Sale (Book sale included at Live program only)

11:15 Overview of the North Carolina State Bar
Maria J. Brown
Walk away with a comprehensive understanding of the North Carolina State Bar and what is required of you.
- Regulatory framework—Chapter 84 of the General Statutes and State Bar Rules
- Obligations of State Bar membership
- Dues
- Continuing Legal Education (CLE) requirements
- Reporting misconduct (Rules of Professional Conduct 8.3)
- Responding to inquiries from the State Bar
- State Bar programs and committees including:
  - LAP, IOLTA and CLE
  - Legal Specialization
  - Client Security Fund and Fee Dispute Resolution
  - Authorized Practice and Administrative Committees
Pro Bono Service in North Carolina
Kim Bart Mullikin
Understand Rule 6.1 and your obligation for Pro Bono service, then learn how to get involved through your local and state bar associations to give back to the community.

Networking Lunch (included at Live program only)

Getting Lost in Our Own Lives†
Robynn E. Moraites
Lawyers suffer increasingly from depression and anxiety, impairments of their own accord, but also major contributing factors to substance abuse. This program examines some of the root causes of lawyer distress and factors that the legal profession itself and lawyers’ personalities contribute to these conditions. Based on the premise that “work-life balance” is a modern day fiction, the program focuses on areas of life that lawyers can control in order to increase their happiness and emotional resilience.

Why Professionalism is Important to You
Samuel G. “Bo” Thompson Jr. and Melvin F. Wright Jr.
It is said your reputation precedes you and your word is your bond. In this dynamic session, hear from a well-respected expert on ways you can ensure a positive, professional reputation.
- Core values and the citizen-lawyer model
- Chief Justice’s Commission on Professionalism (CJCP)
- Professionalism support initiative
- Cases and State Bar opinions on unprofessional conduct
- Importance of a good reputation and respect for all
- Treat each client as the most important in an office
- Personal conflicts such as borrowing money and accepting gifts
- Admit lack of knowledge and seek help from others
- Courtesy and collegial relationship skills with other lawyers and courthouse personnel

Break and Book Sale (Book sale included at Live program only)

A View from the Bench: Cases and Examples of Professionalism and the Challenges of Being a New Lawyer
Chief Judge Linda M. McGee and Judge Paul C. Ridgeway
Hear cases and examples of professionalism from a diverse, experienced panel of North Carolina judges considered to be role-models of professionalism and moral decision-making.

Professionalism Insight and Voluntary Oath
Judge Paul C. Ridgeway

Adjourn

Networking Social (Non-CLE Credit)
Sponsored by NCBA Young Lawyers Division (YLD)
Come get to know other new attorneys at the NCBA Young Lawyers Division networking social and enjoy great food, drinks and fun conversation! Location to be announced at a later date.

†Indicates portion providing Substance Abuse/Mental Health credit
8:25a  Registration

8:55  Welcome and Introductions
     Leah M. Hermiller

9:00  The Attorney-Client Relationship: Things Every Attorney Needs to Know
     Warren T. Savage  and  Mark A. Scruggs
     Begin the day with information on how to best manage the attorney-client relationship from a team of experts who share tips that lead to success and the pitfalls to avoid.
     • Getting a privilege license and its distinction from a law license
     • Creation and termination of clients
       o Choosing clients and allocation of authority
       o Avoiding problem clients and schemes to take advantage of new lawyers in need of business
     • Engagement and termination letters
     • Fees, fee agreements and billing
       o Rule 1.5
       o Appropriate ways to determine what to charge for a service
       o State Bar Fee Dispute Resolution
       o Refunded fees
     • Duties of diligence and communication
       o Rules 1.1, 1.3 and 1.4
       o Tickler systems
       o Phone message systems and client copies
     • The attorney-client privilege and confidentiality

10:00  Practical Ethics for the Modern Law Office
     Joyce P. Brafford
     Overview of the technology necessary to build a law office support system
     • Resources for defining, acquiring, installing and integrating technology
     • Preview of technology’s impact on ethical responsibilities
     • Confidentiality
     • Social media
     • Conflicts control
     • Risk of spoliation of evidence

11:00  Break and Book Sale  (Book sale included at Live program only)

11:15  Follow the Money: Managing a Trust Account
     Peter G. Bolac
     Whether you manage your own trust account or are in a firm where someone else handles it, you need to know how to manage it correctly. In this informative session, all aspects of the trust account are discussed.
     • Rule 1.15
     • Record keeping and software
     • Deposits in a trust account vs. operating account
     • Supervision of personnel handling a trust account
     • Personal injury settlements and real estate transactions
     • Service as an escrow agent
     • Random audit program
     • IOLTA
12:15p  Networking Lunch (Included at Live program only)
Sponsored by Lawyers Mutual Liability Insurance Company of North Carolina

1:15  Starting Out: Financial Planning Strategies
Patrick Yanke
Learn key strategies that focus on managing undergraduate and law school debt when starting out, along with ways to plan for the future.

2:15  Break and Ice Cream Social (Included at Live program only)

2:30  Breakout Sessions (choose one)
- Solo/Small Firm | Organization of a Small Law Office
  Michael W. Bertics, George W. Lennon and W. Thomas McCuiston
- Associate | Mid to Large Size Law Firm Management
  Mary Aiken Barrow and Maureen M. Zyglis
- Corporate Counsel | The Attorney-Client Relationship and Organization of a Legal Department
  Meghan N. Knight and Kimberly A. Licata
- Government/Nonprofit | Organization of Government Legal Department
  Jeffrey D. Bradford, Charlotte R. Stewart and Bradford A. Williams

3:30  Breakout Sessions (choose one)
- Solo/Small Firm | Running a Small Law Office—Panel Discussion
  Michael W. Bertics, Dara Duncan Larson and George W. Lennon
- Associate | Organization of a Mid to Large Size Law Firm
  Michael J. Crook (moderator), Jeffrey R. Whitley and Nathan G. Harrill
- Corporate Counsel | Thriving in Your Legal Career
  Paul J. Griffin and Kenneth B. Hammer
- Government/Nonprofit | Representing Local Governments and Law Firm Organization
  Nicolette Fulton, John P. Schifano and S. Mujeeb Shah-Khan

4:30  Adjourn

Sponsors (at time of printing)
- PLATINUM SPONSOR:
  Lawyers Mutual Liability Insurance Company of North Carolina
- SOCIAL EVENT SPONSOR:
  NCBA Young Lawyers Division

Hotel Information
Contact hotels directly for reservations at the special NCBA room rate.
Rates are based on availability and may sell out.
- Embassy Suites, 201 Harrison Oaks Boulevard, Cary
  Rate: $169 Single/Double. Rate includes a full cooked-to-order breakfast and the manager's evening reception.
  Reservations: 919.677.1840  |  Reference Corporate ID: NCB or NC Bar Rate
- TownePlace Suites by Marriott, 120 Sage Commons Way, Cary
  Rate: $114 studio queen with sleeper sofa (Sunday–Thursday). Rate includes a complimentary hot breakfast. All rooms come with a fully equipped kitchen.
  Reservations: 919.678.0005  |  Ask for the NC Bar Association corporate rate.
 • Michael J. Crook, Parker Poe Adams & Bernstein LLP, Raleigh
 • Neubia L. Harris, Legal Aid of North Carolina, Raleigh
 • Ana S. Nunez, Fay & Grafton, Raleigh

Speakers
 • Chief Judge Linda M. McGee, North Carolina Court of Appeals, Raleigh
 • Judge Paul C. Ridgeway, North Carolina Superior Court, Raleigh
 • Mary Aiken Barrow, Tharrington Smith LLP, Raleigh
 • Kim Bart Mullikin, North Carolina Bar Association Foundation, Cary
 • Michael W. Bertics, Lennon Camak & Bertics PLLC, Raleigh
 • Janet Ward Black, Ward Black Law, Greensboro
 • Peter G. Bolac, North Carolina State Bar, Raleigh
 • Jeffrey D. Bradford, City of Fayetteville, Fayetteville
 • Joyce P. Braddock, North Carolina Bar Association, Cary
 • Deanna S. Brocker, The Brocker Law Firm PA, Raleigh
 • Douglas J. Brocker, The Brocker Law Firm PA, Raleigh
 • Maria J. Brown, North Carolina State Bar, Raleigh
 • Nicolette Fulton, City of Raleigh Attorney’s Office, Raleigh
 • Paul J. Griffin, The Select Group, Raleigh
 • Kenneth B. Hammer, Toshiba Global Commerce Solutions Inc, Cary
 • Nathan G. Harrill, K&L Gates LLP, Raleigh
 • S. Mujeeb Shah-Khan, City of Monroe, Monroe
 • Meghan N. Knight, SAS Institute Inc., Cary
 • Dara Duncan Larson, Duncan Larson Law, Charlotte
 • George W. Lennon, Lennon Camak & Bertics PLLC, Raleigh
 • Kimberly A. Licata, Blue Cross and Blue Shield of North Carolina, Durham
 • W. Thomas Mucoonst, McGucoonst Law Offices PLLC, Cary
 • Robynn E. Moraites, North Carolina Lawyer Assistance Program, Charlotte
 • Warren T. Savage, Lawyers Mutual Liability Insurance Company of North Carolina, Cary
 • John P. Schifano, Town of Holly Springs, Holly Springs
 • Mark A. Scruggs, Lawyers Mutual Liability Insurance Company, Cary
 • Charlotte R. Stewart, North Carolina Housing Finance Agency, Raleigh
 • Samuel G. “Bo” Thompson Jr., Yates McBain & Weyher LLP, Raleigh
 • Jeffrey R. Whitley, Smith Moore Leatherwood LLP, Raleigh
 • Bradford A. Williams, Raleigh City Attorney's Office, Raleigh
 • Melvin F. Wright Jr., The Chief Justice's Commission on Professionalism, Raleigh
 • Patrick Yanke, Yanke Financial, Raleigh
 • Maureen M. Zyglis, Parker Poe Adams & Bernstein LLP, Raleigh

We extend our sincere gratitude to the the planner, moderators and speakers who volunteer their time and expertise toward the goal of presenting an educational program of the very highest quality.
What people have been saying . . .

“The program was helpful because it made me more comfortable and confident in my abilities as a new lawyer. It cleared up a lot of basic questions that I had.”

“There were many helpful sessions that provided real-world examples of issues that young lawyers may face. It is helpful to have an understanding of those issues before you face them on your own.”

“The presenters provided an abundance of information and resources. They provided us with a lot of material that we can use regardless of our chosen practice areas.”

—Attendees, 2016 Fall Professionalism for New Attorneys

NCBA’s PNA Program Highlights

• Prepare your professional image and social media profiles with a free professional headshot. Onsite photographer available May 24.

• Create new professional connections and see old friends at the Tuesday evening networking social!

• All attendees receive a FREE copy of the e-publication, ABC’s of Traffic Law.

• Take advantage of a special opportunity to become a member of the North Carolina Bar Association, free for your first year.

• Attend the Live programs on both days or attend the first day via Live Webcast.

• Start building your professional resource library with our onsite book sale—available only for PNA attendees!

• Live program attendees are treated to a catered lunch with more opportunities to network and socialize.

• Enjoy the special breakout sessions during Wednesday’s program.

• Relax! Your MCLE fees are included in the tuition and your credit reporting to the North Carolina State Bar is handled by the NCBA Foundation.