Professionalism for New Attorneys (PNA)

The final step toward starting your new career!

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.

**LIVE, TWO-DAY OPTION**
Wednesday–Thursday, October 25–26, 2017
Live at the NC Bar Center, Cary

**LIVE and WEBCAST OPTION**
Wednesday, October 25, 2017, Webcast
Thursday, October 26, 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

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

The North Carolina Bar Association is accredited by the North Carolina State Bar as a provider of continuing legal education.
Special Features of the PNA Program at the North Carolina Bar Association!

• Prepare your professional image and social media profiles with a free professional headshot. Onsite photographer available on October 26.

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

• All attendees receive a FREE, second edition copy of the e-publication, *ABC’s of Traffic Law: Do’s and Don’ts of Traffic Court, Second Edition* by Chad Garrett.

• 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 breakfast and a catered lunch on both days of the program.

• Enjoy the special breakout sessions during Thursday’s Live program.

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

NCBA CLE PASSPORT

Access to all your CLE needs with one easy payment

**Top Benefits of CLE Passport**
- Average savings of 25% per year on programs*  
- One easy payment with rolling enrollment  
- Save 30% on all CLE Bookstore purchases  
- $50 discount for current Passport holders  
- No cancellation fees for Passport holders

*Limited number of out-of-state and special programs are not eligible.

Get your CLE Passport today!
ONLINE: [www.tinyurl.com/NCBA-Passport](http://www.tinyurl.com/NCBA-Passport)
PHONE: 800.228.3402

**CLE Passport Pricing**
- NCBA Paralegal Members: 12 Hours (Tokens) for $329
- NCBA Member Attorneys: 24 Hours (Tokens) for $649

Non-member pricing is also available.
Wednesday, October 25, 2017, 8:25a–4:30p

ETHICS AND PROFESSIONALISM

8:25a  Registration and Continental Breakfast

8:55  Welcome and Introductions  
Zachary T. Dawson  
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 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

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  
  o Dues  
  o Continuing Legal Education (CLE) requirements  
  o Reporting misconduct (Rules of Professional Conduct 8.3)  
  o Responding to inquiries from the State Bar  
• State Bar programs and committees, including:  
  o LAP, IOLTA and CLE  
  o Legal Specialization  
  o Client Security Fund and Fee Dispute Resolution  
  o Authorized Practice and Administrative Committees

11:45  Pro Bono Service in North Carolina  
Nihad Mansour and 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.
12:15 Networking Lunch and Book Sale (included at Live program only)

1:15 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.

2:15 Why Professionalism is Important to You
Lisa M. Sheppard and Samuel G. “Bo” Thompson 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

3:15 Break and Book Sale

3:30 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.

4:25 Professionalism Insight and Voluntary Oath
Judge Paul C. Ridgeway

4:30 Adjourn

5:00 Networking Social
Sponsored by NCBA Young Lawyers Division (YLD)
Ruckus Pizza, Pasta & Spirits (Non-CLE Credit)
Park West Village, 1101 Market Center Drive, Morrisville
Come get to know other new attorneys at the NCBA Young Lawyers Division networking social and enjoy great food, drinks and fun conversation!

†Indicates portion providing Substance Abuse/Mental Health credit
Thursday, October 26, 2017, 8:25a–4:30p

LAW OFFICE MANAGEMENT

8:25a  Registration and Continental Breakfast

8:55  Welcome and Introductions
     Zachary T. Dawson

9:00  The Attorney-Client Relationship: Things Every Attorney Needs to Know
     Patrick Brown and Troy G. Crawford
     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  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

11:00  Break and Book Sale

11:15  Practical Ethics for the Modern Law Office
     Joyce P. Brafford
     • 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
12:15 Networking Lunch and Book Sale (included at Live program only)
Lunch 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, Book Sale and Ice Cream Social
Ice Cream Social sponsored by Clio

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
  Kimberly A. Licata
- Government/Public Service | Organization of Government Legal Department
  Jeffrey D. Bradford

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

4:30 Adjourn

(Left to right) New attorneys take their voluntary oath, enjoy a catered lunch on the patio, attend a session in the auditorium and receive information from speaker, Kim Bart Mullikin.
Planner
• Zachary T. Dawson, Smith Moore Leatherwood LLP, Greensboro

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
• 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. Brafford, 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
• Patrick Brown, Lawyers Mutual Liability Insurance Company of North Carolina, Cary
• Troy G. Crawford, Lawyers Mutual Liability Insurance Company of North Carolina, Cary
• Jena M. Edelman, Vidant Health, Greenville
• 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
• George W. Lennon, Lennon Camak & Bertics PLLC, Raleigh
• Kimberly A. Licata, BlueCross BlueShield of North Carolina, Durham
• Nihad Mansour, North Carolina Bar Foundation, Cary
• W. Thomas McCuiston, McCuiston Law Offices PLLC, Cary
• Robynn E. Moraites, North Carolina Lawyer Assistance Program, Charlotte
• Kim Bart Mullikin, North Carolina Bar Foundation, Cary
• John P. Schifano, Town of Holly Springs, Holly Springs
• S. Mujeeb Shah-Khan, City of Monroe, Monroe
• Lisa M. Sheppard, Chief Justice’s Commission on Professionalism, Raleigh
• Samuel G. “Bo” Thompson Jr., Yates McLamb & Weyher LLP, Raleigh
• Jeffrey R. Whitley, Smith Moore Leatherwood LLP, Raleigh
• Patrick Yanke, Yanke Financial, Raleigh
• Maureen M. Zyglis, Parker Poe Adams & Bernstein LLP, Raleigh

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• PLATINUM SPONSOR: Lawyers Mutual Liability Insurance Company of North Carolina
• SILVER SPONSOR: Clio
WHAT PEOPLE HAVE BEEN SAYING . . .

“This program was a good overview of the practice of law and provided good information in the PDFs that I will likely use in my first couple years of practice, if not longer.”

“Not only did [this program] provide an overview of practical areas of law and professionalism that I need to know, but it also provided the opportunity to network with other new attorneys.”

“Thank you for taking the time to put together an event like this. I feel welcomed and more knowledgeable on what it takes to be a good attorney, worthy of membership.”

—Attendees, 2017 Spring Professionalism for New Attorneys (PNA)
Professionalism for New Attorneys (PNA) | Oct. 25–26, 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 in Cary 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/NCBAPNA-Fall17](http://www.tinyurl.com/NCBAPNA-Fall17).

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, Second Edition* by Chad Garrett.

FOUR WAYS TO REGISTER

**ONLINE**  [tinyurl.com/NCBAPNA-Fall17]  **PHONE**  800.228.3402  **FAX**  919.677.1774

MAIL:  **Attn:** Accounting, NCBA, P.O. Box 3688, Cary, NC 27519-3688

*Credit cards only.  **Please make checks payable to NCBA.

PROGRAM OPTIONS (Choose one.)

- **Live Two-Day**  (#664PNA)
  
  Live, Cary, NC Bar Center  |  Wednesday–Thursday, October 25–26, 2017

- **Live and Webcast Two-Day**  (#664LWC)
  
  Day 1: Webcast  |  Wednesday, October 25, 2017
  Day 2: Live, Cary, NC Bar Center  |  Thursday, October 26, 2017

- **Video Replay Two-Day**  |  Cary, NC Bar Center
  
  Wednesday–Thursday, November 29–30, 2017  (#664BAR)

- **Video Replay Two-Day**  |  Concord, Hilton Garden Inn
  
  Thursday–Friday, December 14–15, 2017  (#664CRD)

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 NCBA will enjoy membership benefits through June 2018.

- First year licensed to practice and one section membership (This membership includes 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 ([tinyurl.com/NCBAssections](http://tinyurl.com/NCBAssections)):

- Send me information on the NCBA’s Sections.

REGISTRANT INFORMATION  |  Please print clearly.

Print Full Name: ____________________________________________________________

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 NCBA.  
- Please charge my credit card.

Card Number: ___________________________  Expiration Date: ______________

Signature: ______________________________

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