

NORTH CAROLINA
BAR ASSOCIATION
seeking liberty + justice

2019 NCBA Small Firm & Technology CLE



LIVE and WEBCAST

Friday, June 7, 2019
North Carolina Bar Center
8000 Weston Parkway
Cary

REGISTER TODAY!

Save 10% if registration is received by May 17, 2019.
www.tinyurl.com/CLE861SFP

This program includes the 2019 Small Firm & Technology Section Annual Meeting.



TOTAL CLE CREDIT

Sessions within the Technology and Management Track satisfy NC State Bar Technology Training requirement.

AVAILABLE FORMATS



PROGRAM SUMMARY

This program provides solo and small firms with tools they can use to streamline and grow their practices. Presenters discuss the latest legal technology and share valuable tips on staying compliant with rules designed to help attorneys maintain technological competency. Through substantive legal presentations, attendees also receive updates on a variety of topics, including criminal law, family law and contract drafting.

AGENDA

FRIDAY, JUNE 7, 2019 | 8:00 a.m. – 4:35 p.m.

8:00 **Registration and Continental Breakfast**

gain a working knowledge of the emerging and trending areas in criminal law.

8:55 **Welcome and Introductions**

10:00 **Breakout Transition**

TRACK SESSIONS (Please choose the Technology and Management Track or the General Track for each session.)

10:10 **Technology and Management: 10 Easy Areas to Adopt Technology for Small Firms**⁺

9:00 **Technology and Management: Mobile Device Forensics in Litigation and Investigations — What Small Firm Attorneys Need to Know**⁺

Duncan

Need to update your office technology, but not sure where to start? Join our conversation about cutting-edge tools to improve your practice. Discover strategies for implementing technology into your firm to increase efficiency, streamline communication and promote growth. Change can be hard, but we have tips for making your tech transition easier.

Walton

With the rise of smartphones and laptop computers, we carry more information in our hands than ever before. This session helps small firms appreciate the potential evidentiary and investigative value of the information contained on mobile devices. Discussion topics include steps for preserving information, data security and electronic discovery.

General: Criminal Law Update
Pritchett

Small law firms frequently receive questions regarding criminal law, even if it is not part of their regular practice. Hear about the latest criminal law cases from the North Carolina State Supreme Court and the North Carolina Court of Appeals, and

General: Marijuana, Hemp and CBD in North Carolina
Kight

Beware! These are not synonyms. Everyone is talking about how various forms of the plant are or are not legal and where you can do what. This session covers the main forms of marijuana plant derivatives, how the products are treated federally, the state of the law in NC, an overview of the way different states have handled issues and some speculation on what's next for NC.

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11:10 **Breakout Transition**

11:20 **Technology and Management: Baker's Dozen — 13 Areas of Employment Law**

Sanservino

Have employees? Need help? We focus on 13 specific employment legal issues facing law firms today, including the use of 1099 employees and exempt/non-exempt paralegals among others.

General: Intellectual Property for the Non-IP Lawyer

Lynch and Monath

This session reviews the different types of intellectual property, how property rights are created and protected, and current trends and topics in IP law.

Two experienced attorneys help you understand how to spot potential intellectual property concerns in your matters, steps you can take to manage risks and the ways in which you can leverage technology to protect your clients' assets.

12:20 **Annual Meeting with Presentation**

Pegeen Turner, Legal Cloud Technology and R. Matthew Van Sickle, Van Sickle Law PLLC, 2018-2019 Section Chairs, presiding

12:30 **Networking Lunch**

1:15 **Technology and Management: Niche Practice — How to Do What You Love Without Going Broke**

Huffman and Szymankiewicz

Niche practice sounds great, and it can be. But it is a tough racket and it can be hard to make a transition to an exclusive practice. Receive tips for choosing a niche, marketing, recruiting and keeping clients, and office organization.

General: Top 10 Contracting Mistakes

Liles

Contracts are everywhere. From click-accept terms on our phones to multimillion-dollar merger agreements. But what about when you're asked to review one for a client? Have you conducted an initial risk assessment? Is a broad publicity provision best? And who owns the data? This conversation highlights 10 common contracting mistakes and provides guidance on how to approach the issues in a practical way.

2:15 **Breakout Transition**

2:25 **Technology and Management: Tools for Automating Your Practice for a Better, Stronger, Faster Law Firm[‡]**

Turner

Efficiency is an important part of running a successful law firm. By using technology tools, including workflow, client

AGENDA

intake, document assembly and others, the attorneys and staff within your firm can get more work done and be stronger and faster together, thus providing better client service.

General: Family Law Update Edwards

Family law practice is highly detailed and fraught with procedural pitfalls and deadlines. If you don't practice in family law regularly, you can fall behind "the way it's done."

This session focuses on recent changes in the law that a general practitioner should be aware of, when to call in reinforcements, and how to counsel your first family law client or question.

3:25 **Breakout Transition**

3:35 **Technology and Management: New Ways to Leverage Tech in the Administration of Your Firm's Financials[‡]**

Deshayes

As technology becomes increasingly more cloud-based, more opportunities have appeared to reassess how you manage your firm's finances.

This session covers several issues related to managing your firm's financials, including the following key topics:

- Tax reform's impact on how to account for your practice's

finances

- Tools to increase efficiency and timeliness of your financials
- Leveraging providers to ensure compliance and best outcomes for the firm owner(s)

General: A Small Firm Guide to Appeals — Practical Tips for Timely, Polished and Persuasive Arguments on Appeal

Judge Dietz

The North Carolina Rules of Appellate Procedure can be complicated — even labyrinthian — for lawyers who don't deal with them every day. This session offers practical tips for small firms and solo practitioners navigating the appellate process. An experienced Court of Appeals judge walks through the appellate process, offering insights on everything from promptly filing an appeal and assembling the record to formatting the brief and electronically filing documents.

4:35 **Adjourn**

[‡] Indicates portion providing Technology Training credit

PROGRAM DETAILS

SPEAKERS

- **Judge Richard D. Dietz**, North Carolina Court of Appeals, Raleigh
- **Jason M. Deshayes**, Elliot Davis PLLC, Raleigh
- **Damon T. Duncan**, Duncan Law LLP, Greensboro
- **Rebecca A. Edwards**, Private Practice, Cary
- **Brandon J. Huffman**, Odin Law and Media, Raleigh
- **Don R. “Rod” Kight Jr.**, Kight Law Office, Asheville
- **Venus B. Liles**, SAS Institute Inc., Cary
- **Kathleen M. Lynch**, Olive Law Group PLLC, Cary
- **Robert A. Monath**, Robert A. Monath Attorney at Law, Raleigh
- **Jan E. Pritchett**, Schlosser & Pritchett, Greensboro
- **Nicholas J. “Nick” Sanservino Jr.**, The Noble Law Firm PLLC, Morrisville
- **John R. Szymankiewicz**, Matheson & Associates PLLC, Raleigh
- **Peegen Turner**, Legal Cloud Technology, Raleigh
- **Clark C. Walton**, Reliance Forensics LLC and Alexander Ricks PLLC, Charlotte

CLE AND PUBLICATION SCHOLARSHIPS

Full and partial scholarships are available for attorneys experiencing a financial hardship of any kind.

Apply at www.ncbar.org/cle/scholarship.

EARLY ARRIVALS RECEPTION

Thursday, June 6, 2019 | 5:00–6:30 p.m.
Der Biergarten Cary
1080 Darrington Drive, Cary

HOTEL INFORMATION

Contact hotels directly for reservations at the special NCBA room rate. Rates are based on availability and rooms may sell out.

Embassy Suites

201 Harrison Oaks Boulevard, Cary

- **Nightly Rate:** \$174 single/double
- **Reservations:** 919.677.1840 or www.tinyurl.com/NCBA-Embassy
- **Corporate Account Code:** 2691626

TownePlace Suites by Marriott

120 Sage Commons Way, Cary

- **Nightly Rate:** \$114 studio queen with sleeper sofa (Sunday–Thursday)
- **Reservations:** 919.678.0005
- **Ask for the NCBA corporate rate.**

PLANNERS

- **James M. “Jim” Dedman IV**, Gallivan White & Boyd PA, Charlotte
- **Ashley L. Felton**, Felton Banks PLLC, Raleigh
- **Joshua “Josh” Kalish**, The Noble Law Firm, Chapel Hill
- **Kathleen M. Lynch**, Olive Law Group PLLC, Cary
- **Annette L. Phelps**, Benton Family Law, Goldsboro
- **John R. Szymankiewicz**, Matheson & Associates PLLC, Raleigh
- **Peegen Turner**, Legal Cloud Technology, Raleigh
- **R. Matthew Van Sickle**, Van Sickle Law PLLC, Cary

SPECIAL ACCOMMODATIONS

NCBA makes every effort to ensure a quality learning experience. If you have dietary restrictions or need special accommodations, please contact us at least one (1) week prior to the program start date.

REGISTER TODAY!

Online: www.tinyurl.com/CLE861SFP | **By phone:** 800.228.3402

By mail: Attn: Accounting–NCBA, 8000 Weston Parkway, Cary, NC 27513

STEP 1: Tell us who you are. (Please print clearly.)

Print Full Name: _____

Address: _____

City, State and ZIP: _____

Daytime Phone Number: _____

Email Address: _____

NC State Bar No. (Required for MCLE Credit): _____

STEP 2: Select your tuition rate. (Register early and save 10%. Payment must be received three (3) weeks prior to program date to qualify for the early rate.)

Standard Rate: \$145 / \$130 *Early*

NCBA Member: \$120 / \$110 *Early*

NCBA Small Firm & Technology Section Member: \$110 / \$100 *Early*

CLE Premier Pass: \$0

STEP 3: Select your learning format.

Live (861SFP) General Track Webcast (861LW1)

Technology Track Webcast (861LW2) Video Replay (See below.)

Video Replay registration (if selected).

Video Replays are scheduled for this program. The agenda may not include certain breakouts/tracks shown at the original program. For a list of dates and locations visit www.tinyurl.com/CLE861SFP and indicate your choice below.

Location: _____ Date: _____ Code: _____

STEP 4: Complete your payment information.

(Registration is complete only after payment is processed. Please print clearly.)

I am registering for this program at the tuition rate checked above.

Enclosed is a check, payable to NCBA. Please charge my credit card.

Card Number: _____ Exp. Date: _____

Total Amount: _____ Signature: _____

Discounts may be available for NCBA members who are students, law professors, judges or legal services/public interest attorneys. Call CLE at 800.228.3402 for details.

NCBA

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2019 NCBA Small Firm & Technology CLE

NCBA is an accredited CLE sponsor under the MCLE regulations promulgated by the North Carolina State Bar Board of Continuing Legal Education.

INTRODUCING...

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The 2018-2019 CLE Premier Pass is
an exclusive NCBA member benefit
providing unlimited CLE
including access to hundreds of
On Demand programs.

www.tinyurl.com/PremierPass

REGISTRATION: All registrations are processed after payment is received. To qualify for the early tuition rate, payment must be received prior to the deadline indicated. Stated early discount rate percentage is approximate. Registrations may be capped based on venue size and may include an overflow room with additional seating. **CHANGES TO EXISTING REGISTRATIONS:** Should an attendee need to cancel his or her registration to a Live, Webcast or Video Replay program, the cancellation request must be received by 9:00a ET one (1) week prior to the start of the program to receive a full refund. Any attendee requesting cancellation less than one week prior to the program will receive a refund, less a \$75 administrative fee. An attendee may choose to transfer his or her registration at a program to the Live, Webcast or Video Replay format of the same program only. Transfer requests must be received by 9:00a ET one (1) business day prior to the program start date. An attendee may further choose to substitute his or her registration to a Live or Video Replay program only. Substitution means sending another person to attend the Live or Video Replay program when the original registrant is unable to attend. Substitution requests must be received by 9:00a ET one (1) week prior to the program start date. The substituted person may be assessed a different fee based on their NCBA membership classification. Cancellation, transfer and substitution requests must be provided in writing by email at askcle@ncbar.org or by calling 800.228.3402. If an attendee misses any portion of a program, that portion is not subject to substitution, refund or transfer. Except as provided herein, registrations including On Demand registrations, cannot be cancelled, substituted or transferred once purchased. **NO-SHOWS:** Anyone who is registered for a program, including CLE Premier Pass holders, but does not check in is considered a no-show. No-shows are not issued a refund, and Premier Pass holders will be assessed a \$75 administrative fee. These registrants will receive the digital materials, available in their online accounts, in full consideration of tuition paid. **MISCELLANEOUS:** The NCBA reserves the right to cancel or reschedule programs at any time. Should the NCBA cancel or reschedule a program, registrants may elect to receive a full refund or attend the newly scheduled program. Notifications regarding program changes will be sent to the email address on file. The NCBA is not responsible for any additional expenses incurred as a result of such cancellation or rescheduling. Each attorney must maintain a record of his or her attendance for the NC State Bar Annual Report. MCLE credit is reported by the NCBA only if a NC State Bar number is provided. Registration and attendance at NCBA CLE programs constitutes an agreement by the registrant with the NCBA for use and distribution of the attendee's image or voice in photographs, videotapes, electronic reproductions and audiotapes of such programs and activities. Unless specified, spouses or guests are not eligible to attend NCBA CLE programs and activities without registering to attend. These terms are subject to change.