

Together Delivering More to Bar Members



State Bar of Michigan ANNUAL MEETING

ICLE SOLO & SMALL FIRM INSTITUTE

DeVos Place, Grand Rapids September 17–19

2014

COSPONSORS

State Bar of Michigan

General Practice— Solo and Small Firm Section (Founding Sponsor)

Business Law Section

Law Practice Management & Legal Administrators Section

Practice Management Resource Center Early Bird Savings End August 15, 2014!





Inspiring CLE and Valuable Networking at Your Annual Meeting

Regain the joy of being a solo or small firm practitioner and mitigate the challenges at this year's Institute and State Bar Annual Meeting. Access to expert advice and networking with colleagues helps you come away recharged and retooled for success. Find and keep clients and save time and money with world-class technology and practice management tips. Have confidence in the advice you're giving by staying up-to-date on the latest trends in your practice areas. Plus, enjoy downtime when you venture out and explore the city of Grand Rapids.

Attend and Learn to:

- Build your client base and convert potential clients into paying clients
- Make a business plan that will help you effectively focus your time and energy
- Get the most bang for your buck out of blogging and social media
- Help clients understand long-term care options and how they can pay for them
- Develop new business opportunities by strengthening relationships with existing clients
- Pay less for the technology you need to run your practice
- Boost your productivity with Barron K. Henley's fast-paced tech tips
- Avoid stress by clearing the clutter and managing your time effectively
- Create a comprehensive set of go-to forms to increase profitability and prevent malpractice
- Interpret and apply the new uncapping rules for real property assessment
- Translate your strengths and interests into a successful niche practice

Special Thanks to Our Sponsors

General Practice—Solo and Small Firm Section of the State Bar of Michigan Founding Sponsor

Business Law Section of the State Bar of Michigan

Keynote Presentation Highlights

Client Development for 2014 and Beyond Cordell M. Parvin discusses the old and new tools for client development and how to use them most effectively.

Finding an Extra Hour Every Day: Time Management for Busy Professionals Using humor and high energy, Randall F. Dean addresses common areas of productivity loss.

It's Time for a Change—Better Methods for Generating Complex Documents Consolidate your intellectual capital into first-rate templates—tips from tech expert Barron K. Henley.

Interactive Lunch Events

Thursday—Grab lunch and then join your fellow SSFI attendees for a fun and educational walking tour of the best public art in downtown Grand Rapids. Visit grtagtour.com for more information.

Friday—Share your knowledge and get your questions answered at a free-flowing roundtable lunch compliments of the Law Practice Management & Legal Administrators Section.

(To attend, select the section event when registering)

Law Practice Management and Legal Administrators Section of the State Bar of Michigan

Practice Management Resource Center of the State Bar of Michigan

Featured Speakers at the Solo & Small Firm INSTITUTE



Rick Broida CNET Blog Network Commerce Township

Rick Broida writes about consumer and business technology for CNET, eHow,

PC World, Wired, and other outlets. His popular CNET blog, The Cheapskate, attracts over one million views every month, and he recently published *The Cheapskate Rules:* 21 Easy Money-Saving Tech Secrets, which is available in print and e-book formats. Mr. Broida regularly talks about tech-related issues on WJR's Internet Advisor show. His career as a technology writer recently hit the 25-year mark.



Robert E. Edick
Deputy Grievance Administrator,
Michigan Attorney Grievance Commission
Detroit

Robert E. Edick was a Wayne County assistant prosecuting lawyer for three

years and then spent 17 years in private practice. He was appointed by the Michigan Supreme Court to serve as deputy administrator of the Michigan Attorney Grievance Commission in January 1996. He is a frequent lecturer at local law schools on the topic of professional responsibility.



Cordell M. Parvin Cordell Parvin LLC Dallas, TX

Cordell M. Parvin works with lawyers and law firms to help new lawyers find the

right attitude, set appropriate goals, develop strategies for time management, and build networking skills. Previously, he practiced law for 34 years representing top U.S. transportation contractors. He is the author of three books and has published many articles on these subjects. You can follow Mr. Parvin on Twitter or learn from him through his LinkedIn Coaching Group, or through his daily blog, www.cordellblog.com.



Randall F. Dean
Randall Dean Consulting
& Training LLC
East Lansing

Randall F. Dean is a professional speaker, author, and expert on time and e-mail

management, effective organization, and the related use of technology. For more than 20 years, he has led training and spoken at programs and presentations for corporate, academic, and association audiences. Obsessed with time management and personal productivity, Mr. Dean left a successful career as a graduate program admissions director, professional marketer, and manager to become a leading speaker and trainer.



Barron K. Henley Affinity Consulting Group Columbus, OH

Barron K. Henley is a lawyer, a "legal technologist" since 1990, and a founding

member of Affinity Consulting Group (formerly Henley March & Unger Consulting, Inc.), a firm that handles all aspects of law practice automation including document and file management, server and personal computer issues, remote access, mobile lawyering, scanning and paper reduction strategies, electronic case filing, and many other topics. He is also a member of the ABA Law Practice Management Section.



Jonet K. Welch Executive Director, State Bar of Michigan Lansing

Janet K. Welch is executive director of the State Bar of Michigan. She has had

an extensive career in state government, beginning in the Michigan legislature where she served as a legislative analyst in the House and as the first director of the Senate's nonpartisan legislative analysis office. After graduating from the University of Michigan Law School, she was a law clerk for Michigan Supreme Court Justice Robert P. Griffin. She stayed at the Court for over a decade in a variety of positions, culminating in a position as Supreme Court counsel.

State Bar of Michigan Events

(additional registration required)

State Bar of Michigan Awards Banquet

Wednesday, September 17 6:30pm-9:00pm

Join us as we pay tribute to our members who have achieved the highest honors in areas of leadership, professional integrity, and community service.

State Bar of Michigan Inaugural Lunch

Thursday, September 18 12:00pm-2:00pm

Share in the celebration with the swearing-in of State Bar President Thomas C. Rombach and other State Bar officers.

Celebrating Diversity Reception

Thursday, September 18 6:30pm-8:30pm

The reception will acknowledge the work accomplished over the year in support of achieving greater diversity and inclusion in the legal profession. This year's reception will again include entertainment by Soultivity, a Washtenaw County-based all-lawyer R&B band.

State Bar of Michigan 50-Year Golden Celebration Lunch

Friday, September 19 12:00pm-2:00pm

Celebrate and honor fellow colleagues being recognized for 50 years of membership in the State Bar of Michigan. This is a great opportunity to network with your peers and mentors.

Wednesday, September 17, 2014

SBM ANNUAL MEETING

12:00pm-1:00pm

State Bar of Michigan Commissioner Committees Meetings & Lunch

1:30pm-3:30pm

State Bar of Michigan Board of Commissioners Meeting

2:00pm-4:00pm

Michigan State Bar Foundation Members/Trustees Annual Business Meeting

3:00pm-7:00pm

Annual Meeting Registration Open

4:00pm-5:00pm

State Bar of Michigan New Board of Commissioners Meeting

4:15pm-4:30pm

Fellows of the Michigan State Bar Foundation Annual Business Meeting

4:30pm-6:00pm

Fellows of the Michigan State Bar Foundation Annual Reception (by invitation)

6:30pm-9:00pm

State Bar of Michigan Awards Banquet

Schedule at a Glance—Solo & Small Firm Institute and SBM Annual Meeting

Thursday, September 18, 2014

LEVEL: BASIC/INTERMEDIATE CLE: 10 NALA/NFPA CREDIT: CALL ICLE**

	Solo & Small Firm INSTITUTE	SBM ANNUAL MEETING	
8:00am	Continental Breakfast, Vendor Showcase, and Registration	8:00am-5:00pm Registration and Vendor Showcase Open 8:00am-9:30am Continental Breakfast 8:30am-10:30am Michigan Probate Judges Association Business Meeting 8:30am-12:00pm Agricultural Law Section Business Meeting & Program 9:00am-12:00pm Family Law Section Business Meeting	
8:15am	Put the ICLE Partnership Resources to Work for Your Practice— Demonstration by ICLE Staff		
9:00am	Welcome and Introductions Tanisha Monique Davis, Chair, General Practice—Solo & Small Firm Section of the State Bar of Michigan, Law Offices of Tanisha M. Davis PLLC, <i>Detroit</i>		
9:20am	Report from the Executive Director Janet K. Welch, Executive Director, State Bar of Michigan, Lansing		
9:40am	KEYNOTE PRESENTATION: Client Development for 2014 and Beyond Cordell M. Parvin, Cordell Parvin LLC, Dallas, TX		
10:40am	Vendor Showcase Break		

^{**}Approved for paralegal credit from the National Association of Legal Assistants Inc. and the National Federation of Paralegal Associations Inc. Credit may vary by topic. Call ICLE with specific credit questions.

Schedule at a Glance—Solo & Small Firm Institute and SBM Annual Meeting Thursday, September 18, 2014

	Solo & Small Firm INSTITUTE		SBM ANNUAL MEETING		
11:00am	SUBSTANTIVE LAW	Family Law Update Devin R. Day, RizzoBryan PC, <i>Grand Rapids</i>	9:00am-12:00pm Michigan Lawyers Alliance Business Meeting		
	MARKETING/ LAW PRACTICE MANAGEMENT	How to Develop an Effective Business Plan Cordell M. Parvin, Cordell Parvin LLC, <i>Dallas</i> , <i>TX</i>	9:00am-5:00pm Representative Assembly Business Meeting 9:30am-11:30am Insurance & Indemnity Law Section Business Meeting & Program 10:00am-12:00pm		
	TECHNOLOGY	Does Microsoft Office 365 Suit Your Law Office? Barron K. Henley, Affinity Consulting Group, Columbus, OH			
12:00pm	Lunch and Annual Meeting Functions		Litigation Section Business Meeting		
2:00pm	SUBSTANTIVE LAW	Criminal Law Update Timothy K. McMorrow, Kent County Prosecutor's Office, Grand Rapids	10:00am-12:00pm Michigan Indian Legal Services Business Meeting 11:30am-2:00pm Page Property Law Section Council Meeting		
	MARKETING/ LAW PRACTICE MANAGEMENT	Blogging and Social Media Cordell M. Parvin, Cordell Parvin LLC, <i>Dallas</i> , <i>TX</i>	Real Property Law Section Council Meeting 12:00pm-2:00pm State Bar of Michigan Inaugural Lunch		
	TECHNOLOGY	Access Your Documents from Anywhere and Share Them with Others Barron K. Henley, Affinity Consulting Group, Columbus, OH	1:00pm-3:00pm Administrative & Regulatory Law Section Business Meeting & Program 1:00pm-4:00pm		
2:50pm	SUBSTANTIVE LAW	Planning for Long-Term Care Christopher W. Smith, Chalgian & Tripp Law Offices PLLC, <i>Jackson</i>	American Indian Law Section Business Meeting & Program 1:00pm-4:00pm Appellate Practice Section Business Meeting		
	MARKETING/ LAW PRACTICE MANAGEMENT	Little Big Firm JoAnn L. Hathaway, Practice Management Advisor, State Bar of Michigan, <i>Lansing</i>	Appellate Practice Section Business Meeting & Program 1:30pm-4:30pm Labor & Employment Law Section Business Meeting		
	TECHNOLOGY	Case/Matter Management Software Update Barron K. Henley, Affinity Consulting Group, Columbus, OH	& Program 1:30pm-6:00pm Environmental Law Section Business Meeting		
3:35pm	Vendor Showca	se Break	& Program		
3:55pm	SUBSTANTIVE LAW	Basics of Employment Law for Small Businesses C. John Holmquist Jr., Holmquist Employment Law Firm PLLC, <i>Troy</i>	2:00pm-3:30pm Attorney Discipline Board Panel Member Workshop 2:00pm-4:00pm Michigan Retired Judges Association (Circuit and Court of Appeals) Business Meeting		
	MARKETING/ LAW PRACTICE MANAGEMENT	Expanding Relationships with Existing Clients Cordell M. Parvin, Cordell Parvin LLC, <i>Dallas</i> , <i>TX</i>			
	TECHNOLOGY	What is a Virtual Practice? Diane Ebersole, Practice Management Advisor, State Bar of Michigan, <i>Lansing</i>	2:00pm-5:00pm Young Lawyers Section Business Meeting 2:30pm-4:00pm		
4:45pm	SUBSTANTIVE LAW	Trends in Criminal Law: Drug Recognition Experts Jeffery S. Crampton, Koernke & Crampton PC, Grand Rapids	Consumer Law Section Business Meeting & Program 4:30pm-6:00pm		
	MARKETING/ LAW PRACTICE MANAGEMENT	Cutting Costs, Not Corners Patrick J. Crowley, Crowley Cornish Rockafellow & Sartz PLLC, <i>Lansing</i>	Law School Receptions Michigan State University Thomas M. Cooley University of Detroit Mercy		
	TECHNOLOGY	50 Tech Tips in 50 Minutes Barron K. Henley, Affinity Consulting Group, Columbus, OH	University of Michigan Wayne State University 6:30pm-8:30pm		
			Celebrating Diversity Reception		

Schedule at a Glance—Solo & Small Firm Institute and SBM Annual Meeting Friday, September 19, 2014

	Solo & Small Fir	m INSTITUTE	SBM ANNUAL MEETING	
8:00am	Continental Breakfast, Vendor Showcase, and Registration		8:00am-2:00pm Registration and Vendor Showcase Open 8:00am-9:30am Continental Breakfast 9:00am-11:00am Children's Law Section Business Meeting & Program	
8:15am	Put the ICLE Partnership Resources to Work for Your Practice— Demonstration by ICLE Staff			
9:00am	KEYNOTE PRESENTATION: Finding an Extra Hour Every Day: Time Management for Busy Professionals Randall F. Dean, Randall Dean Consulting & Training LLC, East Lansing			
10:00am	KEYNOTE PRESENTATION: It's Time for a Change—Better Methods for Generating Complex Documents Barron K. Henley, Affinity Consulting Group, Columbus, OH		9:00am-11:45am Master Lawyers Section Business Meeting & Program	
10:50am	Vendor Showca	se Break	9:00am-12:00pm	
11:10am	SUBSTANTIVE LAW	Best Estate Planning Practices for Nontraditional Families Michael P. Witzke, Witzke Berry Carter & Wander PLLC, <i>Bloomfield Hills</i>	Criminal Law Section Business Meeting & Program 9:00am-12:00pm Military & Veterans' Law Section	
	MARKETING/ LAW PRACTICE MANAGEMENT	Ending the Office Clutter: Key Strategies for Managing Info Overload Randall F. Dean, Randall Dean Consulting & Training LLC, <i>East Lansing</i>	Business Meeting & Program 9:30am-11:30am General Practice—Solo and Small Firm Section Business Meeting & Program	
	TECHNOLOGY	Buying Great Tech at a Low Price Rick Broida, CNET Blog Network, <i>Commerce Township</i>	10:00am-12:00pm Judicial Section Business Meeting	
12:00pm	Lunch and Annu	al Meeting Functions	11:00am-4:00pm	
2:00pm	SUBSTANTIVE LAW	Navigating the New Tax Assessment Uncapping Rules Nyal D. Deems, Varnum LLP, <i>Grand Rapids</i>	Arts, Communications, Entertainment & Sports Section Business Meeting & Program	
	MARKETING/ LAW PRACTICE MANAGEMENT	Earning Your Fame and Fortune with a Niche Practice Elizabeth C. Jolliffe, Your Benchmark Coach, <i>Ann Arbor</i>	12:00pm-2:00pm Law Practice Management & Legal Administrators Section Business Meeting & Lunch	
	TECHNOLOGY	Buying a Laptop Today Barron K. Henley, Affinity Consulting Group, Columbus, OH	12:00pm-2:00pm State Bar of Michigan 50-Year Golden Celebration Lunch	
2:55pm	SUBSTANTIVE LAW	Hot Topics in Marijuana Law Gerald A. Fisher, Thomas M. Cooley Law School, <i>Auburn Hills</i>	1:30pm-3:30pm Animal Law Section Business Meeting 2:00pm-3:00pm Paralegal/Legal Assistant Section Business Meeting 2:00pm-4:00pm Negligence Law Section Business Meeting & Program 3:00pm-4:00pm Aviation Law Section Business Meeting	
	MARKETING/ LAW PRACTICE MANAGEMENT	How to Prepare to Wind Down or End Your Practice Robert E. Edick, Deputy Grievance Administrator, Michigan Attorney Grievance Commission, <i>Detroit</i>		
	TECHNOLOGY	Efficient Billing and Accounting for a Small Firm Barron K. Henley, Affinity Consulting Group, Columbus, OH		
3:45pm	Networking Bre	ak		
4:00pm	SUBSTANTIVE LAW	Rules of Evidence from the Judge's Side of the Bench Dennis C. Kolenda, Of Counsel, Dickinson Wright PLLC, <i>Grand Rapids</i>		
	MARKETING/ LAW PRACTICE MANAGEMENT	Closing the Deal: Turning Prospects into Clients Timothy A. Dinan, Dinan & Associates PC, Grosse Pointe Park		
	TECHNOLOGY	Communication Breakdown—It's Always The Same Barron K. Henley, Affinity Consulting Group, Columbus, OH		

Need-Based Scholarships

Scholarships made possible by the generous support of the State Bar of Michigan, the Business Law Section, and ICLE

Scholarships cover the registration fee for the *Solo & Small Firm Institute* and are offered on a first-come, first-served basis. Preference will be given to those who did not receive a scholarship to last year's program. Don't wait—apply today!

To apply, send a statement of need and indicate attendance (Thursday only, Friday only, or both days) to:

ICLE

Attn: Stephanie Fisher 1020 Greene St.

Ann Arbor, MI 48109-1444

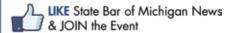
Institute is for you if you are interested in effective, profit producing, efficient practice of law.

R. Timothy KohlerR. Timothy Kohler Law Office,Clinton Township

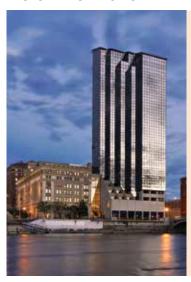
So much information is packed into a session that you'll wonder how the time went by so quickly and wish it would last longer.

-Judith Leppek Adkison Need & Allen, Bloomfield Hills





Hotel Information



Amway Grand Plaza 187 Monroe Avenue NW, Grand Rapids, MI 49503 800-253-3590 | www.amwaygrand.com

Every stay is marked by a memorable moment at the Amway Grand Plaza, whether it's a stroll through the Pantlind Ballroom, or the great view from one of the Glass Tower rooms. The Amway Grand Plaza is much more than a hotel—it's a true destination.

For a reservation, call 800-253-3590. Identify yourself as being with the State Bar of Michigan to receive the group discounted rate. Reservations must be made by August 17, 2014. Registrants are responsible for their own hotel expenses.

Venture out and explore the city, learn what Grand Rapids has in store for you at www.ExperienceGR.com/STATEBAR.

Register me for the following FREE Annual Me	eting Events:	Register me for the Solo & Small Firm Institute:		
SECTION AND ANCILLARY GROUP MEETINGS	TIMES	(Includes materials download. Register for printed handbook and meals separately.)		
THURSDAY, SEPTEMBER 18, 2014		DATES	INSTITUTE FEES	
O ADMINISTRATIVE & REGULATORY LAW SECTION*	1:00PM-3:00PM	INSTITUTE BOTH DAYS 9/18–19/14	\$195 EARLY BIRD \$245 REGULAR	
O AGRICULTURAL LAW SECTION*	8:30AM-12:00PM	INSTITUTE THURSDAY ONLY 9/18/14 \$105 EARLY BIRD \$125 RE		
O AMERICAN INDIAN LAW SECTION*	1:00PM-4:00PM	INSTITUTE FRIDAY ONLY 9/19/14	\$105 EARLY BIRD \$125 REGULAR	
○ APPELLATE PRACTICE SECTION*	1:00PM-4:00PM	Attending the Institute AND want the printed handbook?		
ATTORNEY DISCIPLINE BOARD PANEL MEMBER WORKSHOP	2:00PM-3:30PM	PRINTED HANDBOOK TITLE	PRINTED HANDBOOK FEE	
O CONSUMER LAW SECTION*	2:30PM-4:00PM	SOLO & SMALL FIRM INSTITUTE	○ \$75	
O ENVIRONMENTAL LAW SECTION*	1:30PM-6:00PM	Can't attend the Institute? Order the electronic materials!		
FAMILY LAW SECTION*	9:00AM-12:00PM	ELECTRONIC MATERIALS TITLE ELECTRONIC MATERIALS		
O INSURANCE & INDEMNITY LAW SECTION*	9:30AM-11:30AM	SOLO & SMALL FIRM INSTITUTE	○ \$220	
○ LABOR & EMPLOYMENT LAW SECTION*	1:30PM-4:30PM	Pegister me for the following	Networking Events:	
○ LITIGATION SECTION*	10:00AM-12:00PM	Register me for the following Networking Events: (Contact Amy Castner to reserve tables at meal events. 517-346-6322		
MICHIGAN INDIAN LEGAL SERVICES	10:00AM-12:00PM	or acastner@mail.michbar.org)		
MICHIGAN LAWYERS ALLIANCE	9:00AM-12:00PM	EVENT TITLE # OF TH	CTS EVENT FEES	
MICHIGAN PROBATE JUDGES ASSOCIATION	8:30AM-10:30AM	WEDNESDAY, SEPTEMBER 17, 2014 STATE BAR AWARDS BANQUET	× \$66 EARLY BIRD \$70 REGULAR	
MICHIGAN RETIRED JUDGES ASSOCIATION	2:00PM-4:00PM	THURSDAY, SEPTEMBER 18, 2014	X O SOO EARLI BIRD O \$70 REGULAR	
REAL PROPERTY LAW SECTION COUNCIL	11:30AM-2:00PM	CONTINENTAL BREAKFAST	x O FREE	
REPRESENTATIVE ASSEMBLY I AM A R.A. MEMBER	9:00AM-5:00PM	STATE BAR INAUGURAL LUNCH	× \$45 EARLY BIRD \$49 REGULAR	
O YOUNG LAWYERS SECTION*	2:00PM-5:00PM	CELEBRATING DIVERSITY RECEPTION	<u>x</u>	
FRIDAY, SEPTEMBER 19, 2014		FRIDAY, SEPTEMBER 19, 2014 CONTINENTAL BREAKFAST	x O FREE	
ANIMAL LAW SECTION	1:30PM-3:30PM	50-YEAR GOLDEN CELEBRATION	× \$45 EARLY BIRD \$49 REGULAR	
ARTS, COMMUNICATIONS, ENTERTAINMENT	11:00AM-4:00PM	LUNCH	O Q TO ESTATE BIND O Q TO REGOLD IN	
SPÓRTS SECTION* AVIATION LAW SECTION*	3:00PM-4:00PM	NAME	MIP#	
CHILDREN'S LAW SECTION*	9:00AM-11:00AM	FIRM		
CRIMINAL LAW SECTION*	9:00AM-12:00PM			
GENERAL PRACTICE—SOLO AND SMALL FIRM SECTION*	9:30AM-11:30AM	ADDRESS		
JUDICIAL SECTION	10:00AM-12:00PM	CITY	STATE ZIP	
LAW PRACTICE MANAGEMENT &	12:00PM-2:00PM	PHONE	FAX	
LEGAL ADMINISTRATORS SECTION LUNCH* MASTER LAWYERS SECTION*	9:00AM-11:45AM	SPECIAL AND DIETARY NEEDS		
MILITARY & VETERANS' LAW SECTION*	9:00AM-12:00PM			
NEGLIGENCE LAW SECTION*	2:00PM-4:00PM	PAYMENT INFORMATION SOLO & SMALL FIRM INSTITUTE REGISTRATI	ON SURTOTAL \$	
PARALEGAL/LEGAL ASSISTANT SECTION*	2:00PM-3:00PM	SOLO & SMALL FIRM INSTITUTE MATERIALS SUBTOTAL \$		
TAKALLOAL AUGISTANT SECTION	2.001W 3.001W	NETWORKING EVENTS REGISTRATION SUI	BTOTAL \$	
*Open to all State Bar members		TOTAL AMOUNT DUE	\$	
		CHECK #	CHARGE MY: O VISA	
Early Bird Savings End August 15, 2014		CHECKS PAYABLE TO: STATE BAR OF MICH	IGAN O MASTERCARD	
Cancellation Policy: Cancellation requests must be made in writing of Michigan before August 15, 2014 for a full refund. After August applies. No refunds will be made after August 29, 2014.		DEBIT/CREDIT CARD #	EXP DATE	
Accommodations: Discounted rates are available at the Amway G Grand Rapids. See www.michbar.org/annualmeeting.cfm for detai 800-253-3590. Reservations must be made by August 17, 2014.		PLEASE PRINT NAME AS IT APPEARS ON TH	HE CREDIT CARD	
7		SICNIATURE FOR CREDIT CARD		

REGISTER TODAY!