As a Law Practice Tool

State Bar of Michigan
Webinar, April 12, 2018
Heidi Alexander

- Deputy Director, Lawyers Concerned for Lawyers
- Former practicing attorney
- Expert in law office management and technology
- Member, ABA TECHSHOW Planning Board
- Member, SJC Standing Committee on Professionalism
- Author, *Evernote as a Law Practice Tool*
Ever felt like . . .
Insufficient Systems
When your environment is cluttered, the chaos restricts your ability to focus.
The Answer . . .
“Your brain offloaded to a server. It’s Google for the Web of your life. It’s a spotlight on dark matter of your universe. It’s a tool for converting your smartphone from a time killer to a time saver.”

~ Phil Libin, Co-Founder of Evernote
The Big Four

- OneNote
- Google Keep
- Evernote
Google Keep v. Apple Notes

- Free
- Web, iOS, Android
- Save content from the web
- Save photos and audio
- Labels

- Free
- Mac and iOS only
- Save content from the web
- Save photos, audio, handwriting
- Lock down notes
Evernote v. OneNote

- Free + premium options
- Search heavy
- Save photos and audio
- Labels

- Free (mostly)
- Better analogy to paper notebook
- Save photos, audio, handwriting
- Lock down notes
Devices

- Android
- Apple
- Blackberry
- Windows
- Web

Pricing

- Basic = Free
- Plus = $24.99/yr
- Premium = $49.99/yr
- Premium for Business = $12/user/mo


https://evernote.com/pricing/
Agenda

• What is Inside?
• What Can It Do?
• How Can Attorneys Use It?
• Is It Secure?
What is Inside?
Workspace
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**I2016 Programs To Attend**

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Notes

Title

Body
Page 677
411 U.S. 677 (1973)

93 S.Ct. 1764, 36 L.Ed.2d 583

Frontiero
v.

Richardson

No. 71-1094

United States Supreme Court

May 14, 1973

Argued January 17, 1973

APPEAL FROM THE UNITED STATES DISTRICT COURT FOR THE MIDDLE DISTRICT OF ALABAMA

Syllabus

A married woman Air Force officer (hereafter appellant) sought increased benefits for her husband as a "dependent" under 37 U.S.C. §§ 601, 603, and 10 U.S.C. §§ 2104b, 2106b.

challenged statutes work an invidious discrimination in violation of the Constitution. Reed v. Reed, 404 U.S. 71, P. 691.

MR. JUSTICE POWELL, joined by THE CHIEF JUSTICE and MR. JUSTICE BLACKMUN, while agreeing that the statutes deprive servicewomen of due process, concluded that, in the light of Reed v. Reed, 404 U.S. 71, and the fact that the Equal Rights Amendment has been submitted to the States for ratification, it is inappropriate to decide at this time whether sex is a suspect classification. Pp. 691-692.

Page 678

BRENNAN, J., announced the Court's judgment and delivered an opinion, in which DOUGLAS, WHITE, and MARSHALL, JJ., joined. STEWART, J., filed a statement concurring in the judgment, post, p. 691. POWELL, J., filed an opinion concurring in the judgment, in which BURGER, C.J., and BLACKMUN, J., joined, post, p. 691. REINHOLD, JR., filed a dissenting statement, post, p. 691.

BRENNAN, J., lead opinion

MR. JUSTICE BRENNAN announced the judgment

Search

- Images and PDFs
- Globally
- Within specific Notes and Notebooks
- Tags
- Descriptive search
Frontiero
v.
Richardson
No. 71-1094
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What Can It Do?
Save/Store Content
Text and Audio

Untitled

Drag files here or just start typing
Documents and Images

Untitled

Drag files here or just start typing
My Notes
  • One
  • Two
  • Three
Heidi S. Alexander, Esq.
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www.lclma.org

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           Boston MA 02109
From the Web
From E-mail

- Evernote E-mail Address (Plus and Premium)
- Web Clipper (Gmail)
- Evernote Add-On for Outlook
Evernote E-mail Address
Web Clipper for Gmail
Outlook Add-On

Save this Message to Evernote

Heidi Alexander (heidi@masslomap.org; heidi.masslomap@gmail.com)

Heidi Alexander – Thursday, September 17, 2015 12:46 PM

Please save this message to your Evernote account.

Heidi S. Alexander, Esq.
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(857) 383-3253
Share Content
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Sharing via E-mail
Sharing via Work Chat
Annotate Content
PURCHASE AND SALES AGREEMENT

THIS PURCHASE AND SALES AGREEMENT ("Agreement") dated as of __________
by and between _____________________________ ("Buyer") and _____________________________ ("Seller") (collectively the "Parties" and each a "Party").

ARTICLE ONE
PURCHASE AND SALE OF ASSETS

1.1 Assets. Subject to the terms and conditions hereinafter set forth and in reliance on the representations and warranties set forth herein, Seller shall sell, assign, transfer and deliver to Buyer at the Closing (as hereinafter defined), all of Seller’s rights, title and interest in and to the Practice as a going concern, including all medical equipment, medical supplies, patient records ("Patient Records"), furniture, office supplies and office equipment used in the Practice as of the Closing Date (as hereinafter defined) ("Assets"), as more particularly described in Schedule 1.1.

1.2 Excluded Assets. Any other provision of this Agreement to the contrary notwithstanding, the Assets expressly do not include accounts receivable, cash, current assets or any of the assets listed on Schedule 1.2 (the "Excluded Assets").

1.3 Transfer of Title to the Assets. The sale, assignment, conveyance, transfer, and delivery by Seller of the Assets shall be made at the Closing by appropriate bills of sale, assignments, endorsements, and such other appropriate instruments of transfer as shall be reasonably requested by Buyer or otherwise sufficient to give good and marketable title to the Assets to Buyer as of the Closing Date.
How Can Attorneys Use It?
Firm Administration

(W) Firm Administration

- 01 Office and Systems Info 15
- 02 Policies and Procedures 10
- 03 Financial Management 6
- 04 Forms and Templates 6
- 05 CLE 4
- 06 Meetings 6
- 07 Travel 3

01 Office and Systems Info

Title

Adobe Acrobat Software License
Bank Account Info
Bookkeeper and Accountant Info
Business Plan
Data Backup Information
Fed Ex and UPS Account Information
IT Support Information
Landlord and Lease Info
Malpractice Insurance Carrier
Microsoft Office Software License
Office Phone, Fax, and Address
Router Information
Social Media Access Information
VOIP Telephone System Info
Website and Hosting Information
Title

Client Intake Process
Confidentiality Policy
Disaster Recovery Policy
DRAFT Client Communication Policy
DRAFT Information Security Policy

File Management
Personnel
Retention
Trust Account

Title

2014-10 NSTAR
2014-11 NSTAR
2014-12 NSTAR
2015 Q1 Cash Flow Statement
2015 Q1 Malpractice Insurance

2015-03-03 TOCCs T-Vault Powerbank

Memo: Portable charger

TOCCs
181 Marsh Hill Road
Shipping Department
Orange, CT 06477

PACKING SLIP

Date: 3/13/2015  Time: 3:17:26PM
ORDER ID: 2046300

5220885
Legal Research

(W) Legal Research
- Employment Discrimination
- Landlord Tenant
- M.G.L. c. 93A
- Personal Injury
- Search and Seizure
- Special Education
- Wage and Hour

Frontiero v. Richardson, 411 U.S. 677 (1973)

Page 677
411 U.S. 677 (1973)
93 S.Ct. 1784, 36 L.Ed.2d 303
Frontiero v. Richardson
No. 71-1049
United States Supreme Court
May 14, 1973

ARGUED JANUARY 17, 1973

APPEAL FROM THE UNITED STATES DISTRICT COURT FOR THE MIDDLE DISTRICT OF ALABAMA

Page 678

MR. JUSTICE POWELL, joined by THE CHIEF JUSTICE and MR. JUSTICE BLACKMUN, while agreeing that the statutes do not apply to surgical procedures, concluded that, in the light of Reed v. Reed, 404 U.S. 67, and the fact that the Equal Rights Amendment has now been submitted to the States for ratification, it is inappropriate to decide at this time whether sex is a suspect classification. Pp. 691-692.

BRENNAN, J., announced the Court's judgment and delivered an opinion, in which DOUGLAS, WHITE, and MARSHALL, J., joined. STEWART, J., filed a statement concurring in the judgment, post, p. 691. POWELL, J., filed an opinion concurring in the judgment, in which BURGER, C.J., and BLACKMUN, J., joined, post, p. 691.
Marketing

(W) Marketing
Blog 4
E-Newsletter
Ideas 1
Networking 2
Plans and Reports 3
Writing - Bar Association Article 3

Blog Post Ideas
- Employment Law FAQs
- Paid Sick Leave Legislation
- The Legal Side of Unpaid Internships
- Expansion of Minimum Wage
Tip: Set Reminders
Case Management

- (W) Matters - CLOSED
  2012-12-02 GeoCu

- (W) Matters - NON-ENGAGED
  2014-07-01 TigDa 3

- (W) Matters - OPEN
  2014-12-22 ShaBa 13
  2015-08-01 AleHe 1

- (W) Matters - PENDING
  2015-03-05 BirBi 3
Pending Matters

2015-03-05 Intake

Name (include maiden names or aliases): Big Bird

Home address: Sesame Street
Home phone: 1-800-SesameStreet  Cell phone:
Date of birth: 11/10/69
E-mail (provide a personal e-mail address): big.bird@gmail.com

Names of any businesses you’ve owned or operated: The Bird House
Open Matters
Productivity + Time Management

- Read Later
- Checklists
- Getting Things Done
Checklists

Blog Post Checklist

- Draft post
- Add images
- Final review
- Publish to Wordpress blog
- Post to Facebook page
- Post to LinkedIn Pulse
- Post to Google+
- Tweet 5 times
- Add to eNewsletter
Is It Secure?
Vetting Evernote

• Evernote does not own your data

• Evernote stores data in “multiple redundant servers, storage devices and off-site backups” in the U.S. monitored 24/7 and accessible only to Evernote employees

• Evernote does not freely share information in response to 3rd party requests (i.e. search warrant required and user notification)

• Data is encrypted in transit and rest

www.evernote.com/security
Securing Evernote

- Strong passwords
- Two-step verification
- Passcode lock
- Local notebooks
- Text encryption
Text Encryption

This file contains personal information such as financial account information, social security numbers, and driver's license information.

Fictitious Information Below for Encryption

Visa: 123456789
Social Security #: 123456789
Driver's License #: 123456789

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2014-12-05 Draft Will (v1)

This file contains personal information such as financial account information, social security numbers, and driver's license information.

Fictitious Information Below for Encryption

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Backups

- Evernote data directory
- Export notes
Resources

- Blog:
  - blog.evernote.com

- Help & Learning:
ABA Book Store:  

Get 15% on all ABA book purchases using code MICHBAR
Questions?

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@HeidiAlexander
heidi@masslomap.org