



# WSSFC2023

**Wisconsin Solo & Small Firm Conference**  
October 19-21, 2023 - Kalahari Resort - Wisconsin Dells



## Conference Guide

### TABLE OF CONTENTS

General Information .....	3
Special Events .....	4
Program Schedule .....	6-7
Plenary & Program Session Descriptions.....	8-10
Exhibitor Map .....	12
Sponsors & Exhibitor Directory .....	14-18

### SIGN IN FOR CLE CREDITS!

Please be sure to sign-in at the registration table **each day** to ensure your credits are accurately recorded for the BBE.

### WIN GREAT PRIZES!

Conference attendees have various ways to enter to win thousands in prizes including:

- 2 – Rocketbook Planners/Notebooks
- 1 – Spafinder Gift Card \$100
- 1 – Kindle (2022) Release
- 1 – Type S Car Battery Jump Starter Kit and 8000 mAh Portable Power Bank
- 1 – Polaroid Now 2nd Generation Camera
- 1 – Solo Stove Mesa Tabletop Firepit
- 1 – Ember Temperature Control Smart Mug 2
- 1 - \$150 Target Gift Card
- 1 - \$250 Target Gift Card
- 1 – 2024 AMC Registration
- 1 – 2024 WSSFC Registration
- 1 – Apple Watch SE (2nd Gen) [GPS 40mm] Smart Watch
- And more!

## A SPECIAL THANK YOU TO THE TEAM WHO MADE WSSFC23 POSSIBLE

### EXECUTIVE COMMITTEE

**Melissa A. Spindler**  
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## Legal Expo

This year's Legal Expo features more than 30 businesses whose products and services are designed to help you better manage your practice.

Knowledgeable representatives are on hand to provide you with information on technology, insurance programs, expert services, practice management tools, marketing, research, financial services, and more.

Exhibitors contribute important financial support to State Bar of Wisconsin PINNACLE Conferences & Institutes. Please return that support by visiting their booths.

## Win Prizes

You have several chances to win prizes:

- Stop by the individual booths to register for the many door prizes being offered directly from exhibitors.
- Have your PASSPORT TO PRIZES signed by exhibitors and drop it at the State Bar booth by noon on Friday.
- Drop your business card at the Hospitality Suite on Friday.

## Thursday Evening Attendee Reception in the Legal Expo

On Thursday evening, unwind from a busy day and start making new connections while enjoying beer, wine, soda, hors d'oeuvres, and a cash bar from 4:30 – 6 p.m., sponsored by WILMIC, West Bend Mutual Insurance Company, and KEW Law.

## Ask the President

State Bar President Dean Dietrich will be available and hanging out at the Bar Booth to meet members. If you have a comment or question, he will be there at the following times:

Thursday, October 19th - 11:30 a.m. – 1:00 p.m.

Thursday, October 19th - 4:30 p.m. – 6:00 p.m.

Friday, October 20th - 11:45 a.m. – 1:45 p.m.



Scan this QR code for complete program descriptions, course materials, maps of the conference center, and exhibitor information.

## SIGN IN FOR CLE CREDITS!

Please be sure to sign-in at the registration table **each day** to ensure your credits are accurately recorded for the BBE.



Follow the WSSFC on X. If tweeting about or from the conference the hashtag is #wssfc

## General Information

### REGISTRATION

**IMPORTANT:** Sign in each day before attending any sessions.

<b>Thursday, October 19</b>	<b>8 a.m. - 5 p.m.</b>
<b>Friday, October 20</b>	<b>7:45 a.m. - 4 p.m.</b>
<b>Saturday, October 21</b>	<b>7:45 a.m. - 10:50 a.m.</b>

### CREDITS

WSSFC has been submitted to the Wisconsin Board of Bar Examiners (BBE) for up to 15.5 credit hours, which can be earned by attending and reporting a combination of approved sessions. Depending on your session selections, you may earn up to 15.5 credits, comprised from a combination of CLE, EPR, LPM, and/or LAU credits.

Complimentary webcast replays totaling an additional 8.5 credit hours will be offered in November and December.

Use the schedule on pages 6-7 to track the sessions you attend and plan ahead for webcast replays. Note that the BBE has a 6.0 credit limit per reporting period for Law Practice Management (LPM) and another 6.0 for Lawyer Awareness and Understanding (LAU) credit. If you have questions about CLE credit, please visit the registration desk.

### NAME BADGES

Please wear your badge at all official Conference functions. It is your admission to all CLE programs, workshops, and events. In

addition, your badge will help you to renew old friendships and meet new colleagues. Name badge ribbons will help you identify State Bar speakers, mentors, conference sponsors, and exhibitors.

Thursday and Friday luncheons are ticketed events. Badges will be marked with colored stickers for participants. If you do not have a colored sticker, but would like to attend the luncheons, please visit the registration desk. Availability may be limited.

### PLEASE RECYCLE YOUR NAME BADGE HOLDER

Before you leave the Conference, please drop your name badge holder in one of the name badge boxes. We appreciate your efforts to help our environment.



### GUEST PACKAGES

In an effort to keep Conference tuition down for all attendees, no carryout food or beverage is permitted from the Expo Hall or continental breakfasts. While meals and breaks are for Conference attendees and presenters, food and beverage passes for guests and family members are available for purchase for \$100 each for breakfasts, breaks, receptions, hospitality suite, and luncheons. You may purchase guest passes at the registration desk.

### HOSPITALITY STATIONS

Hospitality stations are located in the Expo Hall. A complimentary breakfast will be served each day, with refreshments served during session breaks.

### LIST OF PREREGISTRANTS

Wondering if someone is here? A list of all preregistered attendees is available at the registration booth.

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# Special Events

THURSDAY, OCTOBER 19

## Conference Kick-Off Luncheon

11:35 a.m. – 12:45 p.m.

Celebrate the grand opening of the Legal Expo Hall at this energizing kick-off event – a convenient on-site lunch in the Expo Hall. It's the perfect opportunity to make new friends, visit with familiar faces, and check out the many unique products and services on display at the Expo. You can even start filling out your Passport to Prizes.

## Attendee Reception

4:30 - 6 p.m.

On Thursday evening, unwind from a busy day and start making new connections while enjoying beer, wine, soda, hors d'oeuvres, and a cash bar from 4:30 - 6 p.m., compliments of *WILMIC, West Bend Mutual Insurance Company, and KEW Law.*

## Barristers' Bowling Bash

6 - 8 p.m.

Join us at the Volcano Lounge and Lanes, located inside Tom Foolery's at the Kalahari, to enjoy pizza and bowl on lanes reserved for conference attendees! *Sponsored by Bakke Norman and Solo/Small Firm & General Practice Section.*

FRIDAY, OCTOBER 20

## Continental Breakfasts

Start your day off right with a hearty breakfast each morning. Plus, we're serving a deluxe continental breakfast on Friday, compliments of *Hupy and Abraham, S.C.*

## Lederer Award Presentation and Networking Lunch

11:45 a.m. - 1:15 p.m.

Don't miss one of the highlights of WSSFC – the presentation of the 2023 Lederer Award. Named in memory of attorney John Lederer, the award is presented annually to an individual, group, or organization exemplifying John's leadership, spirit, and dedication.

## Hospitality Suite

5 - 6:30 p.m.

On Friday evening, the fun doesn't stop. Join your colleagues in the Hospitality Suite for wine, beer, refreshments, and even prize drawings. It's THE place to be.

*Sponsored by Krekeler Law, S.C. and Smith Keane LLP*

## Dine-Arounds

7 p.m.

Let us take care of your Friday night dinner reservations! Sign up for a dine-around, each of which will be hosted by a WSSFC planning committee member at one of many top-notch restaurants in Wisconsin Dells. Enjoy thought-provoking, lively conversation over a delicious meal with colleagues.

Sign-up is easy. Just stop by the registration desk for your preferred dine-around. Stop by early, though. Space is limited and the dine-around restaurants will fill up quickly! Attendees are responsible for their dinner bill. Spouses or significant others are welcome, but please make other plans for the kids.

## WIN FABULOUS PRIZES

Have your **Passport to Prizes** signed by all exhibitors for a chance to win valuable prizes. Passport to Prizes winners will be announced in the Legal Expo after the Networking Luncheon on Friday, but you need not be present to win.

Passport to Prizes forms are available at the Registration Desk and can be deposited at State Bar booth when completed.

## BARRISTER'S BOWLING BASH

Thursday, 6:00-8:00 p.m.  
Volcano Lounge & Lanes

Sponsored by

**BAKKE**  **NORMAN**



Solo Small Firm &  
General Practice Section

## CONTINENTAL BREAKFASTS

Thursday 8 - 8:30 a.m. | North Atrium  
Friday 7:45 - 8:45 a.m. | Expo Hall  
Saturday 7:45 - 8:30 a.m. | North Hallway

Sponsored by **Hupy and Abraham** S.C.  
personal injury lawyers

## HOSPITALITY SUITE

Friday 5:00 - 6:30 p.m. | Room 4000, Sands Building

Enjoy wine, beer, and refreshments sponsored by:

**KREKELER Law, S.C.**  
ATTORNEYS AT LAW



# Visit this year's exhibitors to see how they can help you practice law, manage your business, and enjoy life.

Above the Bar Marketing  
 Akrivis Real Estate Valuation Services  
 ARAG  
 Bank of Sun Prairie  
 Bultman Financial Services  
 Clio  
 Digital Intelligence **SPONSOR**  
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 Wisconsin Law Foundation  
 Wisconsin Probate Forms

**ATTENDEE RECEPTION**  
 Thursday 4:30 - 6 p.m. — Expo Hall  
 Enjoy beer, wine and soda, plus a cash bar and hors' doeuvres sponsored by:





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# Be sure to note room assignments each day for the CLE tracks.

PROGRAM LEVELS | FOUNDATIONAL | INTERMEDIATE | ADVANCED | ALL EXPERIENCE LEVELS

Thursday Schedule	Substantive Track Sponsored by Our Family Wizard	Practice Management Track Sponsored by ABA Retirement Funds	Technology Track Sponsored by Tabs3	Quality of Life/Ethics Track Sponsored by Becker, Hickey & Potser, S.C.
8 a.m. - 5 p.m.	<b>Conference Registration - Be sure to sign in each day!</b> - North Atrium/Expo Hall			
11:30 a.m. - 6 p.m.	<b>Legal Expo Open</b> - Expo Hall			
8 - 8:30 a.m.	<b>Continental Breakfast</b> - Sponsored by Hupy and Abraham, S.C. - North Hallway			
8:30 - 10 a.m.	<b>Opening Plenary: ChatGPT: The Future is Here</b> (1.5 LPM) - Ben Schorr - Ballroom 1/8			
10 - 10:20 a.m.	<b>Refreshment Break</b> - Sponsored by Digital Intelligence - North Hallway			
<b>Session 1</b> 10:20 - 11:35 a.m.	<b>The Alternate Universe of Administrative Law Practice</b> (1.5 CLE) - Jessica M. Kramer (Moderator), David A. Lange, Erin E. Rome <b>Aralia/Marula</b>	<b>Business Analytics for Your Law Firm</b> (1.5 LPM) - Mamie Neely Lee, Lindsay Marty <b>Ballroom 4</b>	<b>Technology Considerations When Setting Up a Law Practice</b> (1.5 LPM) - Jeffrey S. Krause, Christopher C. Shattuck <b>Aloeswood/Tamboti</b>	<b>Interactive Legal Malpractice Claim Scenario</b> (1.5 EPR) - Brian C. Anderson, Paul A. Kinne, Monte E. Weiss <b>Ballroom 5</b>
11:35 a.m. - 12:45 p.m.	<b>Conference Kickoff Luncheon in the Expo Hall</b> (Ticketed event)			
12:45 - 2:10 p.m.	<b>Plenary: Jumping the Generation Gap</b> (1.5 LAU) - Alexis Garuz, Sara Muender, Randall L. Nash - Ballrooms 1/8			
2:10 - 2:30 p.m.	<b>Refreshment Break</b> - Expo Hall			
<b>Session 2</b> 2:30 - 3:20 p.m.	<b>One Year Later: Effects of the New Uniform LLC Law</b> (1.0 CLE) - Jason Brasch, Sam Wayne <b>Aralia/Marula</b>	<b>Know Your Niche</b> (1.0 LPM) - Mayville "May" LaRosa, Anthony K. Murdock, Collin Schaefer <b>Aloeswood/Tamboti</b>	<b>Secure Setup of Microsoft 365</b> (1.0 LPM) - Ben Schorr <b>Ballroom 4</b>	<b>Ethics Jeopardy</b> (1.0 EPR) - Aviva Meridian Kaiser <b>Ballroom 5</b>
3:20 - 3:40 p.m.	<b>Refreshment Break</b> - Expo Hall			
<b>Session 3</b> 3:40 - 4:30 p.m.	<b>Transparency, Fairness &amp; Resolution: Finding Common Ground in Owner and Condo/HOA Board Disputes</b> (1.0 CLE) - Michael J. O'Brien <b>Aralia/Marula</b>	<b>The Ups and Downs of Co-Counsel</b> (1.0 LPM) - Robert J. Kasieta, Elizabeth G. Rich <b>Aloeswood/Tamboti</b>	<b>50 Tips</b> (1.0 LPM) - Jeffrey S. Krause, Nerino J. Petro, Jr., Christopher C. Shattuck, Bryan Sims <b>Ballroom 4</b>	<b>Imposter Syndrome</b> (1.0 LAU) - Maria Serbus <b>Ballroom 5</b>
4:30 - 6 p.m.	<b>Attendee Reception in the Legal Expo</b> - Enjoy complimentary hors d'oeuvres, beer, wine, and soda. Cash bar also available. Sponsored by WILMIC, West Bend Mutual Insurance Company, and KEW Law.			
6 - 8 p.m.	<b>Barrister Bowling Bash</b> - Sponsored by Bakke Norman and Solo/Small Firm & General Practice Section			

Friday Morning Schedule	Substantive Track Sponsored by Our Family Wizard	Practice Management Track Sponsored by ABA Retirement Funds	Technology Track Sponsored by Tabs3	Quality of Life/Ethics Track Sponsored by Becker, Hickey & Poster, S.C.
7:45 a.m. - 1:45 p.m.	<b>Legal Expo Open</b>			
7:45 a.m. - 4 p.m.	<b>Conference Registration - Be sure to sign in each day!</b> - Expo Hall			
7:45 - 8:45 a.m.	<b>Continental Breakfast</b> - Sponsored by Hupy and Abraham, S.C. - Expo Hall			
8 - 8:30 a.m.	<b>Take Control of Health Insurance with the State Bar of Wisconsin Group Health Plan for Law Firms</b> (No CLE Credit) - Aloeswood/Tamboti			
8:45 - 10:25 a.m.	<b>Plenary: Three Views: A "Crossfire"</b> (1.5 CLE) - Moderator: Kathryn L. Knowlton (Moderator), Angela M. Frozena, Megan A. Phillips, Liz Tobolt - Ballrooms 1/8			
10:25 - 10:55 a.m.	<b>Refreshment Break</b> - Expo Hall			

Programs that will be offered as webcast replays.



Follow the **WSSFC** on X. If tweeting about or from the conference the hashtag is **#wssfc**

<b>Session 4</b> 10:55 a.m. - 11:45 p.m.	<b>A Tenant Filed Bankruptcy: Now What?</b> (1.0 CLE) - <i>Jessica M. Kramer, John Menn, Eric Ristau</i> <b>Aloeswood/Tamboti</b>	<b>Efficient, Effective, Economic Use of Your Time</b> (1.0 LPM) - <i>Brittney Busalacchi, Mark J. Goldstein, Katelyn M. Quigley, Gretchen G. Viney</i> <b>Ballroom 4</b>	<b>iOS Tools for Trial Preparation and Presentation</b> (1.0 LPM) - <i>Brett Burney</i> <b>Aralia/Marula</b>	<b>Leave a Message: Client Communication and Your Ethical Duties</b> (1.0 EPR) - <i>Timothy C. Samuelson, Francis X. Sullivan</i> <b>Ballroom 5</b>
11:45 - 1:15 p.m.	<b>Networking Luncheon &amp; 2023 Lederer Award Presentation</b> - Ballrooms 1/8 (Ticketed event)			

<b>Friday Afternoon Schedule</b>	<b>Substantive Track</b> Sponsored by Our Family Wizard	<b>Practice Management Track</b> Sponsored by ABA Retirement Funds	<b>Technology Track</b> Sponsored by Tabs3	<b>Quality of Life/Ethics Track</b> Sponsored by Becker, Hickey & Poster, S.C.
1:15 - 1:45 p.m.	<b>Refreshment Break</b> - Passport to prizes and exhibitor drawing winners will be announced in the Expo Hall			
<b>Session 5</b> 1:45 - 2:35 p.m.	<b>Are you Kid-ding? Child Custody, Placement and Support</b> (1.0 CLE) - <i>Erica T. Gittings, Renee A. Read</i> <b>Aralia/Marula</b>	<b>Should the Corporate Transparency Act Change How You Practice?</b> (1.0 CLE) - <i>Aviva Meridian Kaiser, Stephanie L. Melnick</i> <b>Ballroom 4</b>	<b>Now and Into the Future: Legal Research with Fastcase and AI</b> (1.0 LPM) - <i>Ed Walters</i> <b>Aloeswood/Tamboti</b>	<b>Incorporate Attorney Wellness into Your Firm to Increase Efficiency &amp; Modernize</b> (1.0 LAU) - <i>Emily Dudak-Leiter</i> <b>Ballroom 5</b>
2:35 - 2:50 p.m.	<b>Break</b>			
<b>Session 6</b> 2:50 - 3:40 p.m.	<b>Nail It! Construct Compliant Home Improvement Practices &amp; Contracts</b> (1.0 CLE) - <i>Michael M. Domke, Leslie Elkins</i> <b>Aralia/Marula</b>	<b>The Price Is Right? Alternative Billing Models for Law Firms</b> (1.0 LPM) - <i>Jennifer L. Amundsen, Kristina Mendez</i> <b>Ballroom 4</b>	<b>Digital Forensics for the Digitally Fearful</b> (1.0 LPM) - <i>Brett Burney, Matthew Stippich</i> <b>Aloeswood/Tamboti</b>	<b>Just Say No</b> (1.0 LAU) - <i>Paul F. Angel, Sarah L. Ruffi</i> <b>Ballroom 5</b>
3:40 - 4:00 p.m.	<b>Refreshment Break</b> - North Hallway			
4:00 - 5:00 p.m.	<b>Plenary: Gadgets, Gizmos, and Widgets</b> (1.0 LPM) - <i>Brett Burney, Nerino J. Petro, Jr, Bryan Sims</i> - Ballrooms 1/8			
5 - 6:30 p.m.	<b>Hospitality Suite</b> - Enjoy wine and refreshments sponsored by <i>Krekeler Law, S.C. and Smith Keane LLP</i> - Room 4000, Sands Building (Dinner on your own.)			
7 - ?? p.m.	<b>Dine-Arounds</b> - Meet at your selected venue at 7 p.m.			

<b>Saturday Schedule</b>	<b>Substantive Track</b> Sponsored by Our Family Wizard	<b>Practice Management Track</b> Sponsored by ABA Retirement Funds	<b>Technology Track</b> Sponsored by Tabs3	<b>Quality of Life/Ethics Track</b> Sponsored by Becker, Hickey & Poster, S.C.
7:45 - 10:50 a.m.	<b>Conference Registration</b> - North Hallway			
7:45 - 8:30 a.m.	<b>Continental Breakfast</b> - Sponsored by <i>Hupy and Abraham, S.C.</i> - South Hallway			
<b>Session 7</b> 8:30 - 9:20 a.m.	<b>Advising Licensed Medical Professionals in a Post-Dobbs World</b> (1.0 CLE) - <i>Leslie A. Freehill, Diane M. Welsh</i> - <b>Aralia</b>	<b>Goals and Habits: The Foundations for Success</b> (1.0 LPM) - <i>Erin R. Ogden</i> - <b>Aloeswood</b>	<b>Upping Your PDF Game</b> (1.0 LPM) - <i>Bryan Sims</i> - <b>Marula</b>	<b>Ethics of Working with Your Paralegal and Legal Assistant</b> (1.0 EPR) - <i>Dean R. Dietrich, Mathew S. Mayer, Rhonda Rindo</i> - <b>Tamboti</b>
9:20 - 9:45 a.m.	<b>Refreshment Break</b> - North Hallway			
<b>Session 8</b> 9:50 - 10:40 a.m.	<b>Myths about Elder Law &amp; the Power of the POA</b> (1.0 CLE) - <i>Margaret W. Hickey, Dayna J. Lefebvre</i> - <b>Tamboti</b>	<b>Ten Things to Include in Your Client Intake Process</b> (1.0 LPM) - <i>Daniel J. Krause, J. David Krekeler</i> - <b>Aloeswood</b>	<b>How to "Excel" in the Practice of Law</b> (1.0 LPM) - <i>Bryan Sims</i> - <b>Marula</b>	<b>Challenges and Benefits of Solo Practice</b> (1.0 LPM) - <i>Jody L. Cooper, Zeshan Usman</i> - <b>Aralia</b>
10:50 a.m. - 12:15 p.m.	<b>Closing Plenary: How Not to Commit Malpractice with Your Computer</b> (1.5 EPR) - <i>Paul J. Unger</i> - Ballrooms 1/8			

Programs that will be offered as webcast replays.

## Day One

### Opening Plenary - 8:30 - 10 a.m.

#### ChatGPT: The Future is Here (1.5 LPM)

Generative artificial intelligence (AI) tools like ChatGPT are already rapidly changing the legal industry, giving early adopters a big advantage. ChatGPT uses natural language processing to create various types of written content – from articles to emails to legal briefs. But is it something you need to (or should) incorporate into your law practice? Learn how to use tools like ChatGPT to produce content that resembles something a human would write. Plus, see a real-time demonstration of ChatGPT to find out how it's being used by law firms to increase efficiency.

Ben Schorr, Microsoft, Redmond, WA

### Breakout Session One - 10:20 - 11:35 a.m.

#### The Alternate Universe of Administrative Law Practice (1.5 CLE) **I**

**Moderator:** Jessica M. Kramer, Kramer, Elkins & Watt, LLC, Madison; **Presenters:** David A. Lange, Solo Practitioner, Blue Mounds; Erin E. Rome; Palmersheim Dettmann, S.C., Middleton

#### Business Analytics for Your Law Firm (1.5 LPM) **F**

Marc Ceniglia, Spotlight Branding, Charlotte, NC; Lindsay Marty, Above the Bar Marketing, Madison

#### Technology Considerations When Setting Up a Law Practice (1.5 LPM) **X**

Jeffrey S. Krause, Affinity Consulting Group, Waterford; Christopher C. Shattuck, Madison College, Madison

#### Interactive Legal Malpractice Claim Scenario (1.5 EPR) **I**

Brian C. Anderson, WILMIC, Madison; Paul A. Kinne, Gingras, Thomsen & Wachs, Madison; Monte E. Weiss, Weiss Law Office, S.C., Mequon

### Plenary Session - 12:45 - 2:10 p.m.

#### Jumping the Generation Gap (1.5 LAU)

With five generations (spanning from Gen Z to the silent generation) simultaneously in the workforce, your staff and your clients have a wide range of expectations and priorities. But generational stereotypes could be holding your firm back. Get an overview of the characteristics of each generation and find out how the “generational divide” can impact your practice. You’ll come away with real-world, practical suggestions on bridging generational gaps between staff and clients alike.

Alexis Garuz, Garuz Crawford LLC, Waukesha; Sara Muender, Lawyerist, Largo, FL; Randall L. Nash, Nash Law LLC, Milwaukee

### Breakout Session Two - 2:30 - 3:20 p.m.

#### One Year Later: Effects of the New Uniform LLC Law (1.0 CLE) **A**

Jason Brasch, Bakke Norman, Eau Claire; Sam Wayne, Neider & Boucher, S.C., Madison

#### Know Your Niche (1.0 LPM) **F**

Mayville “May” LaRosa, Law Office of Pietro Canestrelli, APC, Temecula, CA; Anthony K. Murdock, Murdock Law, S.C., Milwaukee; Collin Schaefer, Ogden Glazer + Schaefer, Madison

#### Secure Setup of Microsoft 365 (1.0 LPM) **X**

Ben Schorr, Microsoft, Redmond, WA

#### Ethics Jeopardy (1.0 EPR) **I**

Aviva Meridian Kaiser, State Bar of Wisconsin, Madison

### Breakout Session Three - 3:40 - 4:30 p.m.

#### Transparency, Fairness & Resolution: Finding Common Ground in Owner and Condo/HOA Board Disputes (1.0 CLE) **A**

Michael J. O'Brien, O'Brien Law Office LLC, Chippewa Falls

#### The Ups and Downs of Co-Counsel (1.0 LPM) **A**

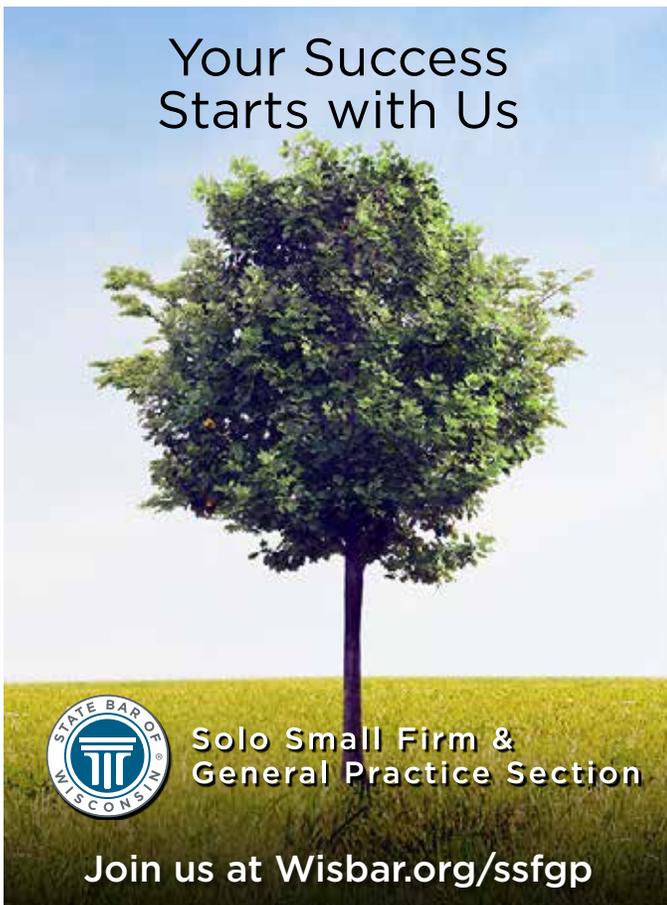
Robert J. Kasieta, Kasieta Legal Group LLC, Madison; Elizabeth G. Rich, Rich Law S.C., Plymouth

#### 50 Tips (1.0 LPM) **X**

Jeffrey S. Krause, Affinity Consulting Group, Waterford; Nerino J. Petro, Jr., The Erickson Group, Inc., Rockford, IL; Christopher C. Shattuck, Madison College, Madison; Bryan Sims, Sims Law Firm, Ltd., Naperville, IL

#### Imposter Syndrome (1.0 LAU) **A**

Maria Serbus, Maria Serbus LLC, Rochester, MN



## Day Two

**Plenary Session - 8:45 - 10:25 a.m.**

### Three Views: A "Crossfire" CLE (1.5 CLE)

Using a complex hypothetical fact pattern, seasoned estate planning, real estate, and family law practitioners will walk you through a hypothetical scenario touching on all three areas of law. You'll determine the best course of action for Lois and Clark, clients who are divorcing after 20 years of marriage. Be prepared to spot issues and resolve conflicts that may cross over into practice areas outside your own.

Moderator: Kathryn L. Knowlton, Disability Rights Wisconsin, Milwaukee; Panelists: Angela M. Frozena, Frozena Law LLC, Kenosha; Megan A. Phillips, Richter & Phillips LLP, Madison; Liz Tobolt, Liz Tobolt Law LLC, Hartland

**Breakout Session Four - 10:55 - 11:45 a.m.**

### A Tenant Filed Bankruptcy: Now What? (1.0 CLE)

Jessica M. Kramer, Kramer, Elkins & Watt, LLC, Madison; John Menn, Swanson Sweet LLP, Oshkosh; Eric Ristau, Laffey, Sebranek, Auby & Ristau, S.C., Sun Prairie

### Efficient, Effective, Economic Use of Your Time (1.0 LPM)

Brittney Busalacchi, Cross Jenks Mercer & Maffei LLP, Baraboo; Mark J. Goldstein, Goldstein Law Group S.C., Milwaukee; Katelyn M. Quigley, Claringbole Law, LLC D/b/a Claringbole Quigley, Appleton; Gretchen G. Viney, University of Wisconsin Law School, Madison

### iOS Tools for Trial Preparation and Presentation (1.0 LPM)

Brett Burney, Burney Consultants, Cleveland, OH

### Leave a Message: Client Communication and Your Ethical Duties (1.0 EPR)

Timothy C. Samuelson, Office of Lawyer Regulation, Madison; Francis X. Sullivan, Office of Lawyer Regulation, Madison

**Breakout Session Five - 1:45 - 2:35 p.m.**

### Are you Kid-ding? Child Custody, Placement and Support (1.0 CLE)

Erica T. Gittings, Wisconsin Divorce Solutions, Madison; Renee A. Read, Remley Law, S.C., Neenah - *Sponsored by Our Family Wizard*

### Should the Corporate Transparency Act Change How You Practice? (1.0 CLE)

Aviva Meridian Kaiser, State Bar of Wisconsin, Madison; Stephanie L. Melnick, Melnick & Melnick, Milwaukee

### Now and Into the Future: Legal Research with Fastcase and AI (1.0 LPM)

Ed Walters, vlex, Washington D.C.

### Incorporate Attorney Wellness into Your Firm to Increase Efficiency & Modernize (1.0 LAU)

Emily Dudak-Leiter, The Law Center, Madison

**Breakout Session Six - 2:50 - 3:40 p.m.**

### Nail It! Construct Compliant Home Improvement Practices & Contracts (1.0 CLE)

Michael M. Domke, WI Bureau of Consumer Protection, Madison; Leslie Elkins, Kramer, Elkins & Watt, LLC, Madison

### The Price Is Right? Alternative Billing Models for Law Firms (1.0 LPM)

Jennifer L. Amundsen, Amundsen Law Firm LLC, Madison; Kristina Mendez, Mendez Law, Green Bay

### Digital Forensics for the Digitally Fearful (1.0 LPM)

Brett Burney, Burney Consultants, Cleveland, OH; Matthew Stippich, Digital Intelligence, Milwaukee

### Just Say No (1.0 LAU)

Paul F. Angel, Angel & Angel, S.C., Dodgeville; Sarah L. Ruffi, Ruffi Law Offices, S.C., Wausau

**Plenary Session - 4:00 - 5:00 p.m.**

### Gadgets, Gizmos, and Widgets (1.0 LPM)

Whether you're looking for tips on getting more from your favorite gadgets or the coolest new gizmos to streamline your work, discover technology that can make your practice and your life easier. In this fun, fast-paced conference favorite, you'll find even more suggestions you can put to use right away to help you in your professional and your personal life.

Brett Burney, Burney Consultants, Cleveland, OH; Nerino J. Petro, Jr, The Erickson Group, Inc., Rockford, IL; Bryan Sims, Sims Law Firm Ltd., Naperville, IL

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PROGRAM LEVELS | F FOUNDATIONAL | I INTERMEDIATE | A ADVANCED | X ALL EXPERIENCE LEVELS

## Day Three

### Breakout Session Seven - 8:30 - 9:20 a.m.

#### Advising Licensed Medical Professionals in a Post-Dobbs World (1.0 CLE) I

Leslie A. Freehill, Pines Bach LLP, Madison; Diane M. Welsh, Pines Bach LLP, Madison

#### Goals and Habits: The Foundations for Success (1.0 LPM) F

Erin R. Ogden, Ogden Glazer + Schaefer, Madison

#### Upping Your PDF Game (1.0 LPM) X

Bryan Sims, Sims Law Firm Ltd., Naperville, IL

#### Ethics of Working with Your Paralegal and Legal Assistant (1.0 EPR) I X

Dean R. Dietrich, Weld Riley, S.C., Wausau; Mathew S. Mayer, Weld Riley, S.C., Wausau; Rhonda Rindo, Weld Riley, S.C., Wausau

### Breakout Session Eight - 9:50 - 10:40 a.m.

#### Myths about Elder Law & the Power of the POA (1.0 CLE) F X

Margaret W. Hickey, Becker, Hickey & Poster, S.C., Milwaukee; Dayna J. Lefebvre, Becker, Hickey & Poster, S.C., Milwaukee

#### Ten Things to Include in Your Client Intake Process (1.0 LPM) X

Daniel J. Krause, Krause Estate Planning & Elder Law, Oregon; J. David Krekeler, Krekeler Law S.C., Madison

#### How to "Excel" in the Practice of Law (1.0 LPM) X

Bryan Sims, Sims Law Firm, Ltd., Naperville, IL

#### Challenges and Benefits of Solo Practice (1.0 LPM) F

Jody L. Cooper, Cooper Law Office, Milton; Zeshan Usman, Usman Law Firm LLC, Madison

### Closing Plenary Session - 10:50 - 12:15 p.m.

#### How Not to Commit Malpractice with Your Computer (1.5 EPR)

Practicing anywhere at any time is no longer just a dream. It's reality. From smartphones and laptops to tablets and cloud-based tools, emerging technologies have made remote practice achievable for many lawyers. But this convenience comes with its own set of risks and there are ethical pitfalls you should be aware of. Learn from the mistakes of those who have run afoul of ethical rules by misusing electronic tools. This humorous look at the dos and don'ts of computing will help you meet ethical challenges with confidence. You'll come away knowing more about how to avoid ethical trouble associated with technology.

Paul J. Unger, Affinity Consulting Group, Columbus, OH

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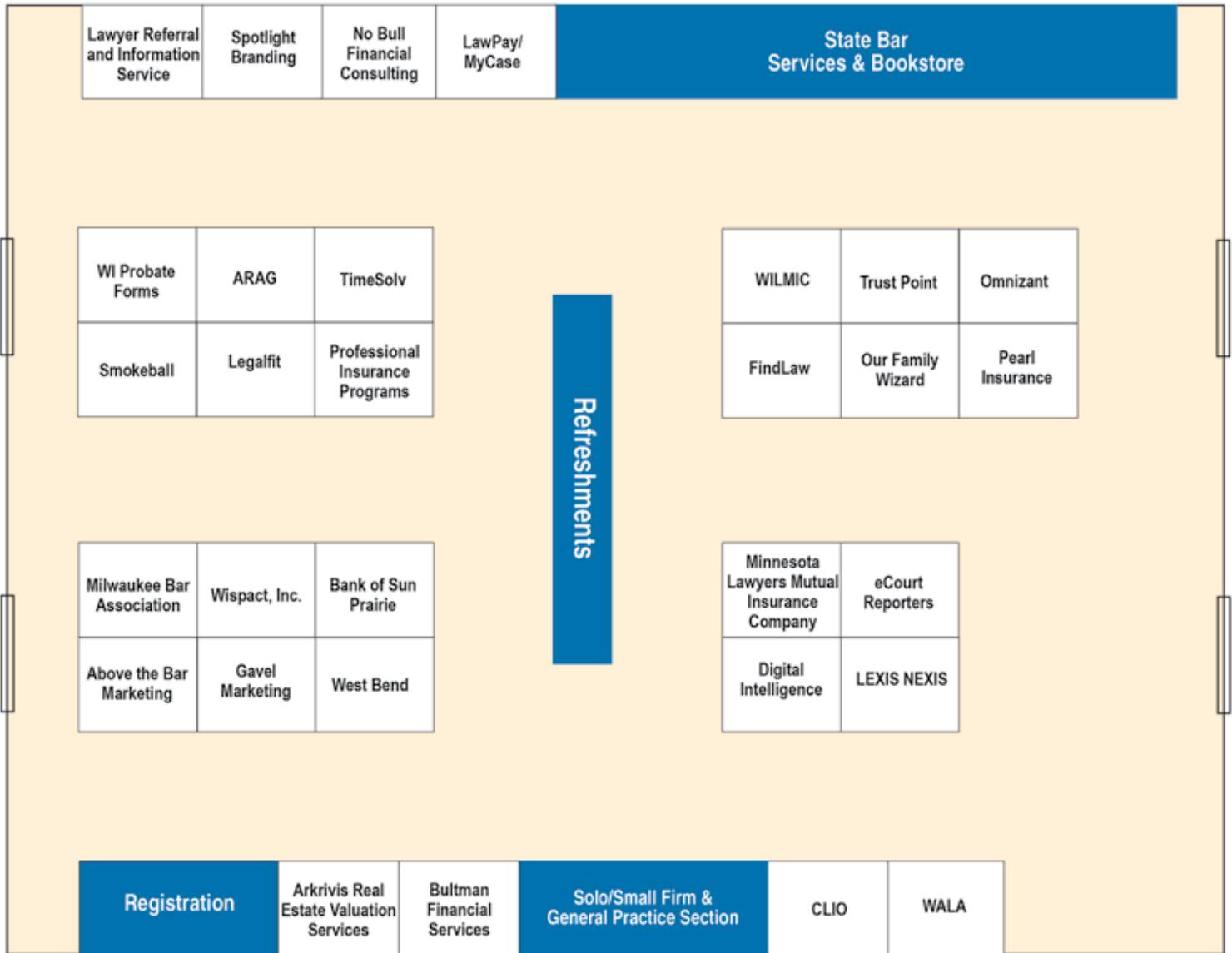


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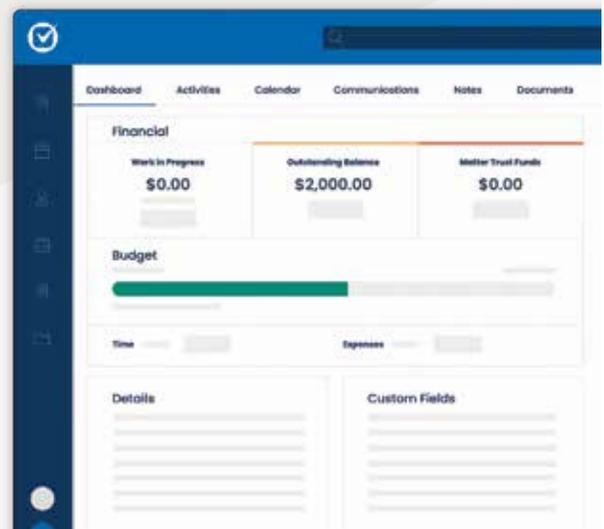
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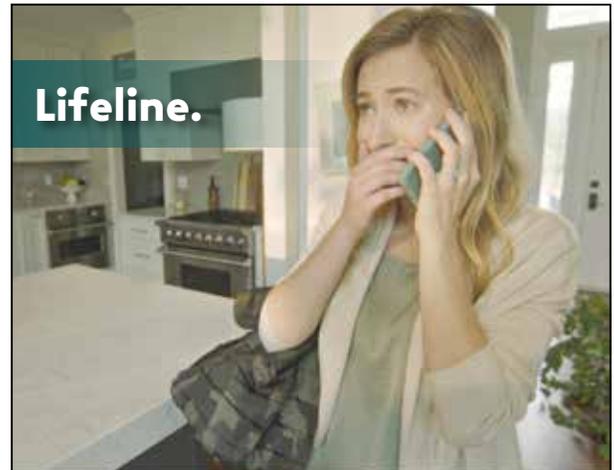
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