

About the Editor

jennifer j. rose (jjrose@jjrose.com) was a solo practitioner practicing family law in rural Shenandoah, Iowa, for more than 20 years before moving to Morelia, Michoacán, Mexico, 21 years ago. In that life, she was listed in Best Lawyers in America, rated AV by Martindale-Hubbell, and served a stint as chair of the Iowa State Bar Association Family and Juvenile Law Section.

She served as editor-in-chief of *GPSolo*, the flagship magazine of the American Bar Association General Practice, Solo, and Small Firm Division (now known as the Solo, Small Firm, and General Practice Division), from 1995 to 2007 and again from 2009 until 2011; served on the Division's Council; served as Secretary and Vice Chair of the Division; and served on too many committees and boards to enumerate.

In the ABA Senior Lawyers Division, she serves on its Book Board and Voice of Experience Board.

She has also served terms on the ABA Standing Committee on Continuing Education of the Bar and the Standing Committee on Publishing Oversight. She has served as list manager and den mother for the listserve *Solosez*, sponsored by the ABA Solo, Small Firm, and General Practice Division, almost since its inception.

She has been a contributing editor to *Matrimonial Strategist* and *Internet Law Researcher*, in addition to having served as a judge of *Law Office Computing's* annual law firm website competition. She publishes and neglects a blog at redshoesarebetterthanbacon.wordpress.com.

She was editor of the first edition of *How to Capture and Keep Clients* (American Bar Association, 2005) as well as its second edition, published in 2015. She was editor of the first edition of *Effectively Staffing Your Law Firm* (ABA, 2009) as well as its second edition, published in 2017.

About the Contributors

DAVID J. ABESHOUSE is a commercial dispute resolution lawyer concentrating his practice (BizLawNY.com) in business-to-business alternative dispute resolution in Uniondale, Nassau County, New York. David serves as neutral arbitrator on the Commercial Panels of Neutrals of the American Arbitration Association, International Centre for Dispute Resolution, and other ADR forums. He also is a forum-based and private mediator and a trainer of new and experienced mediators and arbitrators. David also serves as a “deal mediator” and as an ADR law consultant to other lawyers. He is a charter member of the New York Academy of Mediators & Arbitrators (NYAMA; Executive Committee Member) and Chapter of the National Academy of Distinguished Neutrals (NADN); he is a Fellow of the College of Commercial Arbitrators (CCA) and a Fellow of the American Bar Foundation (ABF). David is a past adjunct law professor, St. John’s University School of Law, teaching ADR Law, and a past chair of the Nassau County Bar Association ADR Law Committee. He has been selected to the New York Metro Area Super Lawyers list for ADR Law for multiple years.

JEFFREY ALLEN is a principal in the law firm of Graves & Allen (gravesallen.com), with a general civil practice in California that since 1973 has emphasized negotiation, structuring and documentation of real estate, loan and other business transactions, receiverships, civil litigation, and bankruptcy. He has also worked as an arbitrator since 1975 and a mediator since 1983. In addition to his practice, Jeffrey has been very active in the American

Bar Association, serving on several editorial boards and regularly contributing to several publications. He has also coauthored five books on technology for attorneys. He has had Martindale-Hubbell AV Preeminent rating for nearly 30 consecutive years and was selected as a Northern California Super Lawyer each year from 2014 to 2019. In 2016 the American Bar Association Solo, Small Firm, and General Practice Division gave Jeffrey a Lifetime Achievement Award; in 2017, the Division recognized him for his work as a trainer and educator. He has been semiretired since September 2017.

JOAN M. BURDA (jmburda@mac.com) is a solo practitioner (lgbtlaw.com) concentrating in estate planning in Lakewood, Ohio. She is the author of the award-winning book *Estate Planning for Same-Sex Couples*, Third Edition (American Bar Association 2015), as well as *Gay, Lesbian, and Transgender Clients: A Lawyer's Guide* (ABA 2008) and *An Overview of Federal Consumer Law* (ABA 1998)—out of print but a real page-turner. Writing about LGBT legal issues, estate planning, and other topics for various online and print publications, Joan is a featured speaker at national and international conferences and workshops. She is an adjunct professor at Case Western Reserve University School of Law, teaching LGBT Legal Issues and Wills, Trusts, and Future Interests. In her spare time, she reviews books for the *New York Journal of Books*. Joan is a member of the American Bar Association, the Ohio State Bar Association, the National Lesbian and Gay Bar Association, and the American Society of Journalists and Authors.

MARVIN S.C. DANG is the managing member of Law Offices of Marvin S.C. Dang, LLC (marvindanglaw.com) in Honolulu, Hawaii, and has been a lawyer since 1978. He's currently the 2018–2019 Chair of the American Bar Association Senior Lawyers Division, a member of the ABA Nominating Committee, a Delegate in the ABA House of Delegates, and a Commissioner on the ABA Commission

on Racial and Ethnic Diversity in the Profession. During the past 42 years, he's held leadership positions in various ABA divisions and sections, beginning with the Law Student Division and continuing with the Young Lawyers Division; the Solo, Small Firm, and General Practice Division; and now the Senior Lawyers Division. A former legislator in the Hawaii State House of Representatives, he's now a registered lobbyist. His law firm's practice areas include legislation, lobbying, creditors' rights, and real estate matters. He received his law degree from the George Washington University Law School in Washington, D.C.

VICKI LEVY ESKIN, owner of Levy & Associates, P.A. (levylawyers.com), in Longwood, Florida, focuses her practice on circuit and appellate mediation in addition to her probate, guardianship, and estate practice. She served three years as the National Solo and Small Firm Conference Chair for the American Bar Association Solo, Small Firm, and General Practice Division and served as ABA Advisor to the Uniform Law Commission Committee, drafting the model code addressing fiduciary access to digital assets, and to the parallel committee for the Real Property, Probate, and Trust Law Section of the Florida bar. She has written and lectured on preserving digital assets, international estate planning, and other areas of estate and trust practice and small office management. She is active in local and state bars, serves on several community boards, and mentors other small firm practitioners. Her email address is Vicki@levylawyers.com.

DAVID R. HAMMER (davidrhammer45@gmail.com) is a semiretired attorney and a U.S. Coast Guard Mariner Master in Richmond, California. His last full-time employment was from 1998 to 2004 as the County Counsel for Trinity County, California. After four years of pro bono legal and community services, David returned to part-time public employment, representing Trinity County Child Protective Services. Prior to his public employment, he was a sole

practitioner for 23 years. David believes that lawyers have a duty to provide public service. He was the pro bono lawyer for the Weaverville Volunteer Fire Department; chairman of the County Drug and Substance Prevention Advisory Board; chairman of the Juvenile Justice and Delinquency Prevention Commission; delegate to the State Bar Convention; past president of two Rotary clubs; and chairman of several Rotary District committees for Northern California. He is now a licensed boat captain and teaches sailing on San Francisco Bay.

VICTORIA L. HERRING (victoriaherring@mac.com) practiced civil rights, discrimination, and employment law in Des Moines, Iowa, as Division Head of the Civil Rights Division of the Iowa Attorney General's office, with a law firm, and as a solo practitioner. As she moved to part-time practice, her love of photography made her a fine art, architectural, and travel photographer, whose work has been displayed throughout the Midwest. Her foray into a second act began with JourneyZing, which provides customized travel research and planning for domestic and international venues and photographic fine art (gallery.JourneyZing.com), which led her to becoming a founding partner and manager of the upscale Artisan Gallery 218 (artisangallery218.com) in the historic Valley Junction of West Des Moines, Iowa. She is the longtime columnist Mac User for *GPSolo* magazine and a member of the Board of Trustees of Des Moines University.

DAVID ZACHARY KAUFMAN (david@businessbrawls.com) started law school at the GMU School of Law (now Scalia Law School) when he was 40 years old. Graduating in 1991, he worked briefly at a large law firm and then went out on his own in 1996, founding the litigation firm that eventually became the Kaufman Law Group, PLLC. David has been an adjunct professor of law at George Mason University School of Law and has practiced various forms of martial arts for over 55 years. As he winds down his

litigation practice, he has increasingly been asked to testify as an expert witness in criminal and civil cases. He is the author of *Qui Custodes*, a blog of self-defense, 101 Personal Protection Tips, 101 Business Protection Tips, and “Workplace Security for Solo and Small Firm Staff,” a chapter in the American Bar Association book *Effectively Staffing Your Law Firm*. David also teaches several CLE/LPM classes each year on law firm security. A member of the Washington, D.C., Maryland, and Virginia bars, he now lives in Sarasota, Florida.

WENDY LASCHER (wlascher@fcoplaw.com), a Southern California native, earned her JD at the University of Michigan Law School in 1973. She was hired by the late Edward Lascher. They became law partners in 1978 and married two years later. After his death in 1991, Wendy continued practicing law in their Victorian building in downtown Ventura. In 2011, she became a partner at Ferguson Case Orr Paterson, LLP. Wendy handles appeals throughout California and beyond. She has represented clients before the United States Supreme Court, the California Supreme Court, and multiple U.S. Circuit Courts of Appeal and in every California Court of Appeal district. She has also handled cases in state and federal trial courts—and advised many potential clients not to appeal. Wendy frequently speaks to lawyers about making the record for appeal, legal writing, and handling writs and appeals.

DAVID J. LEFFLER (DLeffler@culhanemeadows.com) has worked for over 30 years with small businesses, many technology-based, in a variety of industries. He has advised them on formation issues, contract negotiations, and the structuring of asset acquisitions and often fulfills the role of outside general counsel. David has been honored as a Super Lawyer in the fields of corporate, intellectual property, and real estate law for the years 2014–2018. For ten years ending in 2012, he wrote a column on law practice management for solo attorneys for the American Bar Association’s

GPSolo magazine. He has served on advisory boards and from 2011 through 2015 as a judge for the New York StartUP! Business Plan Competition, which is sponsored by Citi Foundation and is held at the Science, Industry, and Business Library of the New York Public Library. David received his law degree from the Benjamin Cardozo School of Law in 1981. After a lifetime in New York City, he recently relocated to Austin, Texas.

SCOTT R. MOTE (Smote@Ohiolap.org) of Columbus, Ohio, is Executive Director of the Ohio Lawyers Assistance Program, Inc. (OLAP). Before making OLAP a full-time endeavor, he practiced law in Columbus for 30 years, the last 18 as founding partner of Harris, McClellan, Binau & Cox PLL. He has served on the American Bar Association Commission on Lawyer Assistance Programs (Commissioner, 2010–2013); Ohio State Bar Association Council of Delegates, the Estate Planning & Probate Law Section, and the Lawyers Assistance Committee; the Florida Bar’s Out-of-State Practitioners Division; the Columbus Bar Association (Admissions (Chair 1994–1996), Probate Committees); Ohio State Bar Foundation; Columbus Bar Foundation; Central Ohio Association for Justice; Franklin County Trial Lawyers Association; and the Central Ohio Association of Criminal Defense Lawyers. He has received the Columbus Bar Association’s 2005 award of merit for service to the profession; the Ohio State Bar Association’s 2006 Ohio Bar Medal, its highest award for service to the profession; the Ohio State Bar Association’s 2010 Eugene R. Weir Award for Ethics and Professionalism; and Capital University Law School’s 2013 alumni of the year award.

LISA A. RUNQUIST (runquist.com) of Northridge, California, has represented nonprofits for over 40 years. She has authored numerous publications on nonprofits, including authoring and editing *Guide to Representing Religious Organizations* (2009) and authoring *The ABCs of Nonprofits* (2nd ed. 2015), which is also now

available in Spanish: *El ABC de Law Organizaciones Sin Fines de Lucro*. Lisa was the first winner of the Outstanding Lawyer Award, an American Bar Association Business Law Section Non-profit Lawyers Award, and in 2010 the first person to also win the Vanguard Award for lifetime achievement. She is a member and former chair of the ABA BLS Nonprofit Organizations Committee and the California Lawyers Association Nonprofit Organizations Committee, served on the editorial board of *Business Law Today*, serves as an Editorial Advisor for ChurchLawAndTax.com, and is an adjunct professor at Trinity Law School.

AVRAM L. SACKS (avram@asackslaw.com) is an attorney in private practice in Skokie, Illinois, concentrating on Social Security law and benefits. He is a former Assistant Regional Counsel for the Social Security Administration, past editor of the *CCH Social Security Law Reporter*, founding member of the Special Needs Alliance advisory council, and the author of two books on Social Security law. A member of the National Academy of Elder Law Attorneys and the National Organization of Social Security Claimants' Representatives, Avram frequently lectures on Social Security matters. In addition to successfully representing clients in cases before the U.S. District Court for the Northern District of Illinois and the U.S. Sixth and Seventh Circuit Courts of Appeal, Avram advises clients on how to maximize their Social Security retirement benefits through optimal claiming strategies.

CRAIG A. STOKES (cstokes@stokeslawoffice.com) is a founding partner of the eponymous law firm, based in San Antonio, Texas. He is admitted to practice in Texas, Florida, California, Arizona, Pennsylvania, New York, Missouri, Oklahoma, Iowa, Minnesota, Oregon, South Dakota, Utah, Idaho, North Carolina, Virginia, New Jersey, New Hampshire, Massachusetts, Georgia, Alabama, Mississippi, West Virginia, Alaska, Tennessee, Kentucky, Rhode Island, and Washington and is admitted to practice before various

federal district and appellate courts, including the United States District Courts of Connecticut, Illinois, Indiana, Michigan, Colorado, Vermont, and Puerto Rico. He passed his first bar exam in Iowa in January 1981, when the bar exam, revelation of results, and swearing in all took place in a single week. Craig's practice is largely in agricultural law. He and some of his colleagues have been referred to as members of the "broccoli bar." *Kingdom Fresh Produce, Inc. v. Stokes Law Office, LLP*, 845 F.3d 609, 621 n.6 (5th Cir. 2016).

JIMMY VERNER of Dallas, Texas (jverner101@vernerlegal.com), received his JD in 1979 from the University of San Diego, where he served as executive editor of the *San Diego Law Review*. After graduation, Jimmy clerked for a federal district court judge in Mississippi, subsequently relocating to Memphis to spend three years in a general practice. Jimmy He later moved to Dallas, where he practiced commercial litigation and later family law. He is board certified in Civil Trial Law and Family Law by the Texas Board of Legal Specialization. Jimmy eventually focused his practice on family law appellate work but in the meantime earned his PhD in Public Policy and Political Economy. Since 2015, after attending an inspirational seminar, he has assisted startups in entity selection and formation, especially with respect to social enterprises. He works mostly online at home part-time but comes off the bench as needed by his firm, Verner Brumley Mueller & Parker PC.

TED A. WAGGONER practices in a small firm, Peterson & Waggoner, LLP (peterson-waggoner.com), in Rochester, Indiana. A general practitioner with an emphasis on real estate, estate planning, and business issues, Ted has focused on business planning concerns for a variety of clients and is a civil mediator. He is active with the Indiana State Bar Association and the Indiana Bar Foundation, where he serves as Chair of the Fellows. Ted is a Fellow of the American Bar Foundation.

ROBIN PAGE WEST was studying photojournalism in college when the events of Watergate inspired her to go to law school. After a stint at her state attorney general's office and several years as a litigator at small and medium-size firms, she hung out her solo shingle and developed a successful niche: federal Civil False Claims Act practice. She went on to become the Editor-in-Chief of the American Bar Association Litigation Section's flagship publication, *Litigation*, and to author the ABA book *Advising the Qui Tam Whistleblower: From Identifying a Case to Filing under the False Claims Act* (2d ed. 2009). She continued to represent whistleblowers with knowledge of fraud on the government until relocating to Austin, Texas, where she is planning an ambitious garden and pursuing a new phase in life.