2017 Joint Spring Meeting

Presented by:
ABA Solo, Small Firm and General Practice Division
ABA Standing Committee on Group & Prepaid Legal Services
Group Legal Services Association

Early Arrivals Social Events and Volunteer Projects:
Wednesday, May 17, 2017

Conference:
Thursday, May 18, 2017 to Saturday, May 20, 2017

Fairmont Scottsdale Princess
Scottsdale, Arizona

MCLE Credit: 13.0 hours of MCLE credit, including 1.0 hours of ethics credit, have been requested in 60-minute states, and 15.5 hours of MCLE credit, including 1.0 hours of ethics credit, have been requested in 50-minute states.

Early arrivals are encouraged to take advantage of the social events and volunteer projects.
About GLSA

Through its educational programs, mentorship opportunities, and business development resources, the Group Legal Services Association (GLSA) improves access to affordable legal services by creating support for legal services plan industry members.

GLSA provides its members with unique benefits including:
- Up-to-date regulatory and industry information
- Self-promotion and volunteer opportunities
- Ability to connect with a mentor in the group legal services industry
- Educational programs, including teleconferences, webinars, other online media and our annual national conferences
- Access to the Universal Application, which connects attorneys to Plan Administrators and opens those attorneys to new clients

For more information about GLSA and legal plans, visit glsaonline.org.
Dear Attendees:

From May 17 to 20, join us in warm and sunny Scottsdale Arizona at the AAA Five Diamond resort, Fairmont Scottsdale Princess for the 2017 Joint Spring Meeting presented by the ABA Solo, Small Firm and General Practice Division (GPSolo); ABA Standing Committee on Group and Prepaid Legal Services; and the Group Legal Services Association (GLSA).

This exciting conference will offer abundant CLE, with high-profile nationally known speakers, opportunities for networking, committee work, distinctive social events and a break from the office in a vacation-like atmosphere. The meeting schedule will leave you ample time to golf, spa, shop, hike or explore Scottsdale. There will be something for everyone, including:

• A Welcome Reception at a replica southern ghost town, Copper Canyon. This western themed event will feature dinner, line dancing, mechanical bull riding and other fun activities.

• Professional Development. Set yourself apart from the competition with three tracks of CLE offering the most current industry developments, profitable strategies, revenue ideas and work life balance.

• Learn about new products and services available to solo and small firm attorneys. Meet industry vendors who sell products and services geared toward solo and small firm attorneys.

• Learn more about how Group Legal Services can enhance your law practice from solo and small firm practitioners and the plan administrators themselves.

• After the daily meetings and CLE conclude, shop in Scottsdale, hike, enjoy the many pools at the Fairmont, golf at the world famous TPC Stadium Course located on the grounds of the Fairmont Scottsdale Princess or enjoy the Fairmont’s Well & Being Spa, one of the best spas in Arizona.

Few other meetings feature sessions more dedicated to what you do. Your attendance will open the door to knowledge, techniques, leaders, and other resources not available to you elsewhere and at a fraction of the time and expense.

We look forward to seeing you at this all in one conference.

Sincerely yours,

David H. Lefton  Keri C. Norris
GPSolo Chair    GLSA President
Governor’s Welcome

May 2017

Welcome!

As Governor of the State of Arizona, it is my pleasure to welcome you to the 2017 Joint Spring Meeting of the American Bar Association Solo, Small Firm and General Practice Division.

This meeting brings together attorneys at all levels of practice to engage and inform solo, small firm, and general practice lawyers. This unique event provides an all-in-one environment for education, networking, and idea sharing.

The State of Arizona is a place of opportunity for all. People from all over the world come to see this amazing oasis in the desert. While you are here, I hope you are able to explore Arizona’s landscapes -- from the red rocks of Sedona to the cool caves of Kartchner Caverns, there is so much beauty for us to celebrate.

Arizona is the land of boundless opportunity. We welcome you and wish you a successful and enjoyable visit to the Grand Canyon State!

Sincerely,

Douglas A. Ducey
Governor
State of Arizona
WELCOME

On behalf of the City Council and the citizens of Scottsdale, I am pleased to welcome you to the 2017 Joint Spring Meeting. It is an honor to host a nationally renowned organization such as American Bar Association Solo, Small Firm and General Practice Division. We are pleased to share with you the beauty and vitality of the “West’s Most Western Town.”

I invite you to explore Scottsdale, visit our museums and attractions, enjoy our beautiful McDowell Sonoran Preserve and spend some time in downtown Scottsdale, visit our fine shops, art galleries and experience some of Scottsdale’s excellent restaurants.

I encourage you to enjoy the conference and all that Scottsdale has to offer.

Again, welcome to Scottsdale and thank you for joining us here for your meeting.

Sincerely,

[Signature]

W. J. “Jim” Lane
Mayor of Scottsdale
Hot Topics in Scottsdale:
Burning Questions about Our Spring Meeting

Key West was AMAZING. What’s going to be amazing about Scottsdale?

Everyone who attends the 2017 Joint Spring Meeting in May will have a great time — guaranteed! The two groups have put together an incredible event.

The Fairmont Scottsdale Princess is a gorgeous venue, and we will have plenty of time to enjoy the amenities while getting enough CLE credits to fulfill most of our state requirements. The legal topics are timely (e.g., “Developing Issues Affecting LGBT Immigrant Communities” and “Data Breach”), informative (e.g., “How to Be a Successful Legal Plan Provider” and “Chronic Illness — A Legal and Financial Potpourri”) and unique (e.g., “Death and Taxes and Zombies” and “Improve Your Professional Skill Set with Poker Strategy”). Our panel members are diverse — we fully expect to have the speakers engaged in passionate and provocative discussions.

There are a number of planned extracurricular activities including a Dine-Around program by Peter Blauner of Law and Order, golf, attendance at the Musical Instrument Museum, etc. Hurry and sign up to take advantage of the early registration fees!

How will this conference allow me to demonstrate leadership in law and avoid getting lost in the crowd?

The 2017 Joint Spring Meeting affords one an opportunity to engage in focused professional development as a practitioner and lawyer-leader through exciting CLE programs and events. I am looking forward to hearing from experts in the field, whether it is professional responsibility 201, or how to maintain a great customer base, etc. Additionally, I am always excited to sample the latest in technology and learn how to maximize attorney strength for optimum outcomes for our client base. Oh, with regards to not getting lost, name tags and business cards are a must. I look forward to meeting new and exciting professionals and reuniting existing relationships; the networking landscape at the 2017 Joint Spring Meeting is rich and full of opportunity for professional growth and achievement.

I don’t know anyone in GLSA or GPSolo. How can I make new friends at this conference?

The 2017 Joint Spring Meeting is a great opportunity to get to know fellow members in a smaller and more personal environment, even if you’ve never attended and don’t know anyone. There are not only relevant sessions to improve your law practice, but also great social and networking events to meet people on a less formal basis where you can just relax and make friends. Last year in Key West, I met wonderful vendors and fellow practitioners at the vendors exposition, during the tour of the Hemingway House, and on the fabulous Catamaran cruise. This year, I am looking forward to the dine-around, re-connecting with great vendors to see what is new in tech and trade, catching up with folks I met in Key West (and saw again in Cincinnati), and attending sessions like the one intriguingly entitled “The Common Law and the Wild West” (description said it includes a game!). You can also come meet me, during a session entitled “Off the Reservation: Native Cultural Appropriation and The Law.” There is even a tour set to go to Frank Lloyd Wright’s Taliesin West home, which is a spectacular opportunity. Come to Scottsdale!
I'm an attorney at a large/medium-sized firm. Is there any reason why I should attend this conference?

Absolutely!! This is your chance to grow that valued relationship with the legal insurance providers. Throughout the conference, there will be numerous opportunities to socialize with representatives from many of the providers. It allows me to have individual time with the providers to show them that, although we are a large/medium sized law firm, our mutual clients are treated with the upmost dignity and respect. They can feel comfortable in referring clients to us because they know their clients are in good hands. In addition, you will have the opportunity to meet other attorneys from around the country that have developed procedures to get the most from their legal plans. I always leave the conference with a few essential ideas to increase my firm’s business in relation to the legal insurance industry. The State of Industry session, which normally kicks off the conference, is extremely valuable for my firm. It give us an understanding of the direction the legal insurance industry is moving towards and accomplishments that have been reached in the past year. This Joint Spring Meeting is circled in red on my calendar every year and it is not one that my firm would miss.

Matt Hahne

How will this conference serve trustees even better than those before it?

This conference is uniquely designed for trustees that oversee legal plans for their unions. The most significant difference from other conferences that support trustee professional development, GSLA is focused on prepaid legal trustee support. Our conference is designed with emphasis on real life tools that can be used after leaving our meetings. We design a setting where information can be given with an opportunity for questions and answers. We also bring trustees together where they can meet other trustees from other organizations and exchange information. Our conference offerings will refresh your skills and update your knowledge base for the year ahead.

GSLA has always supported the trustees with informative specialists. This year is true to form with innovative presenters, Ryan Curtis, Scott Dunbar and Kathy Hesse. The sessions will center on everything from fiduciary duties and legal exposure to a traditional update of ERISA. Kathy, Ryan and Scott will bring their brand of enthusiasm to the sessions. Come prepared with questions that you have developed since the last conference! Remember these sessions are designed to stimulate conversation and more importantly support you in your work as a trustee.

Charles Johnson

What’s here for law tech companies and innovators?

The conference kicks off with a State of the Industry panel with a variety of legal technology companies leaders followed by presentations on innovations that will help your practice or plan throughout the three days. Cybersecurity and leveraging technology to improve legal services delivery are top of mind for most attorneys and plans. Topics like marketing, metrics or key performance indicators, data breaches will be presented by tech savvy experts. Our vendor exhibits will include applications and solutions for solos and plan attorneys, with a special emphasis on efficient practice management.

Mary Juetten
# Schedule of Events

(As of 05/15/17)

Events will take place at the Fairmont Scottsdale Princess unless otherwise noted. The events are subject to change without notice.

## WEDNESDAY, MAY 17

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
</table>
| 10:00 AM – 12:00 PM | Volunteer Program — Law Triage Clinic (Preregistration Requested)  
Arizona State University, Sandra Day O’Connor College of Law, 111 E. Taylor St., Phoenix, AZ  
Sponsored by **ONE400** |
| 12:00 PM – 7:30 PM | Desert Adventures and Wellness Programming by the Fairmont Scottsdale Princess  
(Make Your Own Reservations) |
| 3:00 PM – 7:00 PM | GLSA Board of Directors Meeting — Part 1 |
| 4:00 PM – 6:00 PM | Volunteer Program — Law Triage Clinic (Preregistration Requested)  
Arizona State University, Sandra Day O’Connor College of Law, 111 E. Taylor St., Phoenix, AZ  
Sponsored by **ONE400** |
| 4:00 PM – 7:00 PM | Registration |
| 7:00 PM – 9:00 PM | Local Mixer — Beyond Law and Order: Writing Stories for the Screen and Page with Peter Blauner (Preregistration Required) |
| 7:00 PM – 10:00 PM | GPSolo Leadership Dinner (Invitation Only) |

## THURSDAY, MAY 18

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 AM – 5:00 PM</td>
<td>Registration / EXPO</td>
</tr>
<tr>
<td>7:00 AM – 8:00 AM</td>
<td>Welcome Breakfast</td>
</tr>
<tr>
<td>8:00 AM – 9:00 AM</td>
<td>GPSolo FY2018 Directors’ Meeting</td>
</tr>
</tbody>
</table>
| 8:00 AM – 10:00 AM | ■ CLE — State of the Industry: What’s Next  
■ CLE — Law Practice Management: Key Performance Indicators Simplified  
■ CLE — Traffic Ticket Law, Coast to Coast |
| 8:30 AM – 9:30 AM | GPSolo Women’s Initiative Network (WIN) |
| 9:30 AM – 11:30 AM | GPSolo Executive Committee Meeting |
| 10:00 AM – 10:30 AM | Meet the Vendors Coffee Break |
| 10:30 AM – 11:30 AM | Breakout Sessions  
■ CLE — ERISA Update: Part I  
■ CLE — Law Practice Management: Key Performance Indicators Simplified  
■ CLE — Traffic Ticket Law, Coast to Coast |
| 10:30 AM – 11:30 AM | GPSolo Young Lawyers Committee Meeting |
| 11:00 AM – 12:00 PM | GPSolo Solo and Small Firm Resource Center Committee and Technology Committee Joint Meeting |
| 11:30 AM – 11:45 AM | Meet the Vendors Break / Lunch on the Go Pick-Up (Lunch $55 — Preregistration Required) |
## Schedule of Events

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:30 AM – 1:30 PM</td>
<td>GPSolo Corporate Sponsors Committee Meeting</td>
</tr>
<tr>
<td>11:30 AM – 3:00 PM</td>
<td>GPSolo Magazine Board Meeting</td>
</tr>
<tr>
<td>11:30 AM – 4:30 PM</td>
<td>GLSA Board of Directors Meeting — Part 2 (Lunch will be provided)</td>
</tr>
<tr>
<td>11:45 AM – 12:45 PM</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Cross-Marketing Your Publications and Your Practice</td>
</tr>
<tr>
<td></td>
<td>■ CLE — ERISA Update: Part II</td>
</tr>
<tr>
<td></td>
<td>■ Non-CLE — Strategies for Building a Seven Figure Law Firm</td>
</tr>
<tr>
<td>11:45 AM – 12:45 PM</td>
<td>Lunch On Own</td>
</tr>
<tr>
<td>12:45 PM – 1:00 PM</td>
<td>Meet the Vendors Break</td>
</tr>
<tr>
<td>1:00 PM – 2:00 PM</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Chronic Illness: A Legal and Financial Potpourri</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Death and Taxes and Zombies</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Free Legal Research Resources</td>
</tr>
<tr>
<td>2:00 PM – 2:15 PM</td>
<td>Meet the Vendors Break</td>
</tr>
<tr>
<td>2:15 PM – 3:15 PM</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Adobe Acrobat: For the Love of Your Practice</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Understanding Credit Scores</td>
</tr>
<tr>
<td></td>
<td>■ Non-CLE — Tips and Tricks from a 30-year Veteran of Online Legal Research</td>
</tr>
<tr>
<td>Sponsored by Casemaker</td>
<td></td>
</tr>
<tr>
<td>3:15 PM – 3:30 PM</td>
<td>Meet the Vendors Break</td>
</tr>
<tr>
<td>3:30 PM – 4:30 PM</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td>■ CLE — eDiscovery Processes &amp; Procedures: The ‘Know-How’ with the ‘How-to’</td>
</tr>
<tr>
<td></td>
<td>■ TBD</td>
</tr>
<tr>
<td>3:30 PM – 5:00 PM</td>
<td>■ CLE — The Common Law and The Wild West, featuring Trespassers Educational Game</td>
</tr>
<tr>
<td>Sponsored by ONE400</td>
<td></td>
</tr>
<tr>
<td>5:15 PM – 6:30 PM</td>
<td>First Time Attendees Meet and Greet / Meet the GLSA Board Candidates / Opening Session</td>
</tr>
<tr>
<td>6:30 PM – 10:00 PM</td>
<td>Welcome Reception (Included in Meeting/Guest Registration. Welcome Reception Ticket Only—$75.)</td>
</tr>
<tr>
<td>10:00 PM – 12:00 AM</td>
<td>Hospitality Suite</td>
</tr>
<tr>
<td>Sponsored by Wolters Kluwer</td>
<td></td>
</tr>
</tbody>
</table>
## Schedule of Events

### FRIDAY, MAY 19

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 AM – 8:00 AM</td>
<td>Breakfast / Meet the Plan Administrators</td>
</tr>
<tr>
<td>7:00 AM – 8:00 AM</td>
<td>GPSolo Focus Group (Invitation Only)</td>
</tr>
<tr>
<td>7:00 AM – 1:30 PM</td>
<td>Registration / EXPO</td>
</tr>
<tr>
<td>8:00 AM – 9:00 AM</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td>■ CLE — How to Be a Successful Legal Plan Provider Attorney</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Special Trustees Topic: Overview of Fiduciary Duties and Liabilities: Working with Others and Avoiding Pitfalls</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Water Wars!</td>
</tr>
<tr>
<td></td>
<td>Sponsored by <strong>ONE400</strong></td>
</tr>
<tr>
<td>8:00 AM – 9:00 AM</td>
<td>GPSolo Awards Committee Meeting</td>
</tr>
<tr>
<td>8:00 AM – 11:00 AM</td>
<td>GPSolo Book Publications Board Meeting</td>
</tr>
<tr>
<td>9:00 AM – 9:15 AM</td>
<td>Meet the Vendors Break</td>
</tr>
<tr>
<td>9:15 AM – 10:15 AM</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Developing Issues Affecting LGBT Immigrant Communities</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Responding to a Data Breach</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Special Trustees Topic: Real-World Applications of ERISA Best Practices</td>
</tr>
<tr>
<td>10:15 AM – 10:30 AM</td>
<td>Meet the Vendors Break</td>
</tr>
<tr>
<td>10:30 AM – 11:30 AM</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Building a “Lead” Generating System for Your Law Firm</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Leveraging Technology for Law Office Efficiency</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Off the Reservation: Native Cultural Appropriation and The Law</td>
</tr>
<tr>
<td>10:30 AM – 11:30 AM</td>
<td>GPSolo eReport Board Meeting</td>
</tr>
<tr>
<td>11:30 AM – 11:45 AM</td>
<td>Meet the Vendors Break</td>
</tr>
<tr>
<td>11:45 AM – 1:15 PM</td>
<td>Solo and Small Firm Awards Luncheon / GLSA Annual Meeting and Election (Included in Meeting / Guest Registration. Luncheon Ticket Only — $55.)</td>
</tr>
<tr>
<td>1:15 PM – 1:30 PM</td>
<td>GLSA Trustees’ Caucus</td>
</tr>
</tbody>
</table>
## Schedule of Events

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:30 PM – 1:45 PM</td>
<td>Meet the New GLSA Board</td>
</tr>
<tr>
<td>1:45 PM – 2:45 PM</td>
<td>■ CLE — The Wellness CLE Part I: Prioritizing Mindfulness in Your Practice</td>
</tr>
<tr>
<td>2:00 PM – 6:30 PM</td>
<td>Golf Tournament ($85 per person — Preregistration Required)</td>
</tr>
<tr>
<td>2:00 PM – 6:30 PM</td>
<td>Spa Treatment (Make Your Own Reservations)</td>
</tr>
<tr>
<td>3:00 PM – 4:00 PM</td>
<td>■ CLE — The Wellness CLE Part II: More Secrets of Conscious Lawyers</td>
</tr>
<tr>
<td>6:00 PM – 10:00 PM</td>
<td>On Your Own Optional Activities (Make Your Own Reservations)</td>
</tr>
<tr>
<td>10:00 PM – 12:00 AM</td>
<td>Hospitality Suite</td>
</tr>
</tbody>
</table>

**SATURDAY, MAY 20**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 AM – 12:45 PM</td>
<td>Registration</td>
</tr>
<tr>
<td>8:00 AM – 9:00 AM</td>
<td>Breakfast and Raffle Drawings</td>
</tr>
<tr>
<td>9:00 AM – 10:00 AM</td>
<td>GPSolo Branding Task Force Meeting</td>
</tr>
<tr>
<td>9:00 AM – 10:00 AM</td>
<td>■ CLE — Balancing Ethical Considerations with Emerging Technologies</td>
</tr>
<tr>
<td>9:30 AM – 10:30 AM</td>
<td>GPSolo Diversity Board Meeting</td>
</tr>
<tr>
<td>10:00 AM – 10:15 AM</td>
<td>Break</td>
</tr>
<tr>
<td>10:15 AM – 11:15 AM</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Crowdfunding Litigation: How, Why, and When</td>
</tr>
<tr>
<td></td>
<td>■ CLE — Improve Your Professional Skill Set with Poker Strategy: Lessons for Lawyers, Trustees and Entrepreneurs</td>
</tr>
<tr>
<td>10:30 AM – 12:30 PM</td>
<td>GPSolo Council Meeting</td>
</tr>
<tr>
<td>11:15 AM – 11:30 AM</td>
<td>Break</td>
</tr>
<tr>
<td>11:30 AM – 12:30 PM</td>
<td>■ CLE — The Future of Legal Services</td>
</tr>
<tr>
<td>12:30 PM – 12:45 PM</td>
<td>Looking Forward to 2018 with GLSA President Jean Clauson</td>
</tr>
<tr>
<td>1:00 PM – 4:00 PM</td>
<td>Saturday Afternoon Event — Musical Instrument Museum with Lunch at the Museum’s Café Allegro (Preregistration required. Each person is responsible for his or her own transportation, museum admission, and lunch.) Musical Instrument Museum, 4725 E. Mayo Blvd., Phoenix, AZ</td>
</tr>
</tbody>
</table>
By Chris Marohn, Program Manager at Arizona State University, Sandra Day O’Connor College of Law

The Arizona Legal Center is available to anyone, free of charge. People in need of free legal services or people with sufficient financial resources, but who want legal triage services before obtaining appropriate counsel.

The Arizona Legal Center is a resource for new lawyers and students, as well as support for practicing attorneys. We help attorneys who are new to the law, those looking to change practice areas, and veterans who want to participate in creating creative solutions to everyday legal challenges.

Working with the ABA GPSolo and GLSA volunteers, the Arizona Legal Center will provide assistance in the triage of the case, determining if the person has a case and providing some guidance thereafter.

During this clinic, each volunteer will be placed in a group of similar practice areas. This will give us the opportunity to triage each case and present it to the right practice group. In addition, this will allow each volunteer the ability to network with others within their practice area.

We want this clinic to serve all those who participate. We want to make this an experience of networking with members of the GLSA and GPSolo communities, as well as giving back to the community of Phoenix. This is a rare opportunity to serve the communities in Arizona, by working side by side with people of like practice. Do not miss this opportunity to share what you know with those who can benefit the most.

Date: Wednesday, May 17
Time: 10:00 AM – 12:00 PM and 4:00 PM – 6:00 PM. Preregistration requested.
Location: Arizona State University, Sandra Day O’Connor College of Law, 111 E. Taylor St., Phoenix, AZ
Transportation: TBD
1. Join GPSolo and/or GLSA first. Meet online or via telephone second. Come to the conference prepared to meet in person as “old friends” third!

The Joint Meeting between GPSolo and GLSA is not only packed with information, but it’s also a great place to meet and make friends. Held in attractive, vibrant locations, the Conference offers numerous opportunities to bond with fellow solo or small firm attorneys from all over the country. Prepare ahead of time and find your crew by connecting with other GLSA and GPSolo members before the conference. Be ready for a memorable conference!

— Aastha Madaan

2. Meet all the exhibitors!

They can help your business make an impact and operate efficiently. Our Members have many needs while practicing law and running their business and our Exhibitors address many of the services our Members need. Our Exhibitors offer services that our Members may not know about and learning about them can be one the “Golden Nuggets” that you gain while attending the conference. Many of our Exhibitors offer services that you can grow your practice and bottom line. The Networking with Exhibitors and Attendees is invaluable!

— Len Feltoon

3. Don’t grab your luggage and forget your contacts when you go back home! Stay in touch with your fellow conference attendees on social media and plan to meet in person again.

The value of an in person meeting at these conferences is worth the price of admission alone. To be able to sit and dine with plan administrators and plan attorney colleagues is an experience that can’t be matched. You don’t get this opportunity even if you make a personal visit to the home offices of the plan companies. The personal touch is the best practice to set your practice in motion. You will also learn the latest in the industry. Learn what the plans are concerned, set your goals ahead of the competition and, after the conference, follow up on them by e-mail, Facebook, LinkedIn or telephone. Plan to build meaningful relations over time, beginning with the conference or even in the months just before it.

— Pat Monks
## Session Descriptions

### THURSDAY, MAY 18

<table>
<thead>
<tr>
<th>Time</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>8:00 AM – 10:00 AM</strong></td>
<td><strong>CLE — State of the Industry: What’s Next?</strong></td>
</tr>
<tr>
<td><strong>Moderator:</strong></td>
<td>Stephen Ginsberg, Unifor Legal Services Plan, Toronto, ON</td>
</tr>
<tr>
<td><strong>Panelists:</strong></td>
<td>Jeff Bell, LegalShield, Ada, OK&lt;br&gt;Brian Caron, Hyatt Legal Plans, Cleveland, OH&lt;br&gt;Jean Clauson, ARAG, Des Moines, IA&lt;br&gt;Dan Lear, Avvo, Seattle, WA&lt;br&gt;Charley Moore, Rocket Lawyer, San Francisco, CA&lt;br&gt;Sally Robertson, LegalZoom, Los Angeles, CA&lt;br&gt;Alien Rodriguez, ONE400, Pasadena, CA&lt;br&gt;John Wachsmann, Wachsmann &amp; Associates, Englewood, CO</td>
</tr>
<tr>
<td><strong>Session Description:</strong></td>
<td>Legal Plans act as a fulcrum for access to justice. They provide affordable access to attorneys. This interactive session is back, and expanded to two hours, by popular demand, because attorneys want to better understand how Legal Plans work, and how they help law practice marketing and management. Commercial plans, union plans and attorney providers are all represented on this panel. Last year we emphasized plan design, highlighting the characteristics of some of the newer “platform-based” legal services offers. Now it’s time to switch gears. It’s time to discuss what’s next for affordable access to attorneys. The proposed changes to the ABA Model Rules of Professional Conduct will be part of the discussion.</td>
</tr>
</tbody>
</table>

| **10:30 AM – 11:30 AM** | **CLE — ERISA Update: Part I**                                                   |
| **Speaker:**          | Katherine Hesse, Murphy Hesse Toomey & Lehane, LLP, Quincy, MA                    |
| **Session Description:** | This session reviews the most significant recent Supreme Court decisions and selected lower court decisions affecting benefit plan fiduciaries and professionals. The practical lessons that can be taken from these decisions will be emphasized. Take homes from this session will include an understanding of important cases affecting health, pension, and prepaid legal plans; how these cases could affect trustee actions and policy development; and what to be aware of in the future. |

| **10:30 AM – 11:30 AM** | **CLE — Law Practice Management: Key Performance Indicators Simplified**          |
| **Speaker:**          | Mary Juetten, Evolve Law, Bellingham, WA and Phoenix, AZ                          |
| **Session Description:** | Key Performance Indicators (KPIs) are critical to measure client satisfaction, performance, profitability, and collections, all measures that are more than traditional billable hours and profits per partner. However, knowing how to get started; where to focus; and how to follow-up can be overwhelming. We will review a KPI framework; discuss the seven areas of measurement, including new client development; and examine the data and approach to support KPI implementation to improve your firm’s profitability. Case study approach for several metrics and the resulting changes will be used plus attendees will receive a starter spreadsheet for 5 simple metrics. |

| **10:30 AM – 11:30 AM** | **CLE — Traffic Ticket Law, Coast to Coast**                                     |
| **Moderator:**        | Keri Coleman Norris, LegalShield, Ada, OK                                       |
| **Speakers:**         | Matthew Davidson, Davidson Law, Houston, TX<br>Gerald Patrick “Pat” Monks, Monks Law Firm, Houston, TX<br>Steve Monks, Monks Law Firm, Durham, NC |
| **Session Description:** | This program includes discussions of federal and national compliance, safety and accountability. Attendees will learn how to set up a state traffic ticket practice; and how to create a statewide network of traffic ticket attorneys. Attendees will receive various documents and forms along with best practices for their use. Finally, this session will include time for interactive Q&A with panel experts. |
Session Descriptions

**11:45 AM – 12:45 PM**

**CLE — Cross-Marketing Your Publications and Your Practice**

**Speaker:** Melanie Bragg, Legal Insight, Inc., Houston, TX

**Session Description:** Lawyers are readers and writers. In this session, you will learn how to use those skills to enhance the caliber and profile of your law practice while achieving your secret dream of becoming an author. This session will discuss the process of becoming an author and give attendees tips for being both a successful author and lawyer. Ethical and legal issues raised in the course of publishing and cross marketing will be addressed. This interactive session will provide opportunity to ask questions and share best practices for publishing and leveraging your writing skills to expand your practice.

**11:45 AM – 12:45 PM**

**CLE — ERISA Update: Part II**

**Speaker:** Katherine Hesse, Murphy Hesse Toomey & Lehane, LLP, Quincy, MA

**Session Description:** In the second hour of this two-part program, Ms. Hesse will continue to review the most significant recent Supreme Court decisions and selected lower court decisions affecting benefit plan fiduciaries and professionals. The practical lessons that can be taken from these decisions will be emphasized, in preparation for tomorrow morning’s session led by Scott Dunbar on Practical Applications of ERISA Best Practices.

**11:45 AM – 12:45 PM**

**Non-CLE — Strategies for Building a Seven Figure Law Firm**

**Speaker:** Stephen Fairley, Rainmaker Institute, Phoenix, AZ

**Session Description:** If you’re like many of the attorneys you have goals, dreams and ambitions, but struggle to break or consistently break the million dollar mark...and every once in a while you wonder if it’s really worth it all. The skills that helped build a good 6-figure practice are not the same skills you will need to build a great 7-figure law firm. So if you’re tired of beating your head against the wall and you’re ready to take a fresh look at how to break out of the cycle you’re stuck in then attend to discover:

- What it really takes to build a 7-figure law firm.
- How to position yourself as a recognized expert and attract higher quality clients.
- Three biggest reasons why you’re not getting more referrals and how to overcome these hurdles.
- The two things every Million Dollar Law Firm has in place (you will never achieve 7 figure revenues without both of these).
- Two key metrics you must measure every month if you want to grow your law firm.
## Session Descriptions

### 1:00 PM – 2:00 PM

**CLE — Chronic Illness: A Legal and Financial Potpourri**  
**Moderator:** Cynthia Sharp, The Sharper Lawyer, Philadelphia, PA  
**Panelists:**  
- Robert H. Bancroft, Law Offices of Robert H. Bancroft, Flint, MI  
- Mike Gianelli, Gianelli & Associates, Modesto, CA  
- Rinky Parwani, Parwani Law PA, Tampa, FL  
**Session Description:** Those suffering from chronic illnesses face a set of financial and legal challenges requiring special expertise. Panelists will share their decades of collective experience in this area during this energetic and content rich session.  
Geared to all levels, topics will include Estate Planning Documents; Special Needs Trusts; Governmental Benefits; Guardianships; Long Term Care Insurance; Guarding Against Elder Abuse; Care Plans; Tips for Settling Family Issues; Ethical Conundrums; and insurance in the Post ACA World. Come prepared to ask questions and share best practices during this interactive session.

### 1:00 PM – 2:00 PM

**CLE — Death and Taxes and Zombies**  
**Speaker:** Adam Chodorow, Sandra Day O’Connor College of Law at Arizona State University, Phoenix, AZ  
**Session Description:** This session will explore the tax consequences of a zombie apocalypse, focusing on whether those who die and come back as zombies should be considered dead for estate tax purposes. The answer to this question is important for both the government, which will have a significant need for revenue, and wealthy individuals, who may have tax planning opportunities.

### 1:00 PM – 2:00 PM

**CLE — Free Legal Research Resources**  
**Speaker:** Michael J. Maslanka, Sacks, Goreczny, Maslanka & Costello, P.C., Chicago, IL  
**Session Description:** Free legal research resources are quite plentiful. You and your staff can obtain very valuable legal information from them. These sites cover law from A to Z, and from cases to statutes to articles. They can be a wonderful supplement to your primary, subscription-based, legal research library. Come to this session and get acquainted with a multitude of legal research sites that will enhance your practice, and at the best cost: $0.

### 2:15 PM – 3:15 PM

**CLE — Adobe Acrobat: For the Love of Your Practice**  
**Speaker:** Alan Klevan, Law Offices of Alan J. Klevan, Wellesley, MA  
**Session Description:** All lawyers use some sort of word processing program to draft documents. Yes, these are “drafts,” not documents. PDF files are documents. Why? By their very nature, drafts created by word processing programs can be changed or edited by anyone, anywhere. Sending editable drafts can create a multitude of issues that PDF documents do not. PDF documents are easy to create and are quite dynamic. This session will demonstrate how to scan documents into a file in PDF format and use Adobe Acrobat to combine documents and build binders; Bates stamp documents; search documents for words or phrases; create bookmarks in large files; create secure and password protected documents; and archive entire Outlook folders.

### 2:15 PM – 3:15 PM

**CLE — Understanding Credit Scores**  
**Speaker:** Rochelle N. Poulton, The Arizona Credit Law Group, PLLC, Tempe, AZ  
**Session Description:** This session will provide an overview of credit scores, credit reporting, and the Fair Credit Reporting Act. Attendees will learn how to identify and resolve credit legal issues stemming from real estate transactions, divorce, bankruptcy, and life’s other curveballs; as well as the practical impact of credit upon consumers, homebuyers, and business owners.
<table>
<thead>
<tr>
<th>Time</th>
<th>Session Description</th>
</tr>
</thead>
</table>
| 2:15 PM – 3:15 PM | **Non-CLE — Tips and Tricks from a 30-year Veteran of Online Legal Research**  
**Sponsored by Casemaker**  
**Speaker:** Jim Corbett, Casemaker, Mukilteo, WA  
**Session Description:** With over 30 years of experience in online legal research experience (Wall Street Law Librarian, 15 years with Lexis, 8 years with VersusLaw and 6 years with Casemaker), Jim Corbett will discuss and demonstrate some of the strategies and techniques of effective and efficient online legal research. |
| 3:30 PM - 4:30 PM | **CLE — eDiscovery Processes & Procedures: The ‘Know-How’ with the ‘How-to’**  
**Speakers:** Jeff Allen, Graves & Allen, Oakland, CA  
Gregory McFarlane, Thomson Reuters, New York, NY  
**Session Description:** This program will provide insight into the current state of technology in eDiscovery, and will provide practical guidance around questions and issues that arise at any stage of eDiscovery. The program will also provide an overview of ethical guidelines relevant to conducting eDiscovery. Participants will receive valuable checklists for all phases of the workflow, allowing participants to develop eDiscovery strategies and practices that provide sound client representation, and are effective, defensible, and ethically compliant. |
| 3:30 PM – 5:00 PM | **CLE — The Common Law and The Wild West, featuring Trespassers Educational Game**  
**Sponsored by ONE400**  
**Speaker:** Robert J. McWhirter, Author and Attorney, Phoenix, AZ  
**Session Description:** This engaging historical session explains the origins of sheriffs, coroners, the posse and other icons of the Wild West, including the “hanging judge,” and their roles in the modern legal landscape. Late in the program, we will play Trespassers — an educational game designed especially for this CLE to help us discover ways that the justice system in the Old West reflected today’s progressive ideals of equality, liberty and justice, and ways that today’s justice system is actually wilder than the justice system in the Old West. |
| FRIDAY, MAY 19 |  
8:00 AM – 9:00 AM | **CLE — How to Be a Successful Legal Plan Provider Attorney**  
**Moderator:** Riyad Bacchus, Sykes Assistance, London, ON, Canada  
**Panelists:** Florence Bruemmer, Plan Panel Attorney for ARAG, Phoenix, AZ  
Ben Farrow, Plan Panel Attorney for LegalShield, Montgomery, AL  
Russell Wenk, Plan Panel Attorney for Hyatt Legal Plans, Goodyear, AZ  
**Session Description:** A panel discussion by Group and Prepaid Legal Services Panel Attorneys about what it takes to truly serve, service and provide great customer service to customers and legal plans in today’s rapidly evolving legal environment. The session will look at customer service, plan service standards, business considerations, legal plan technology and ethical issues from the view of the front line attorney. The panel members will discuss best practices and technology, and share law practice management tips. |
8:00 AM – 9:00 AM CLE — Special Trustees Topic: Overview of Fiduciary Duties and Liabilities: Working with Others and Avoiding Pitfalls
Speaker: Ryan Curtis, Fennemore Craig, P.C., Phoenix, AZ
Session Description: Serving as a Trustee or in other fiduciary capacities for an employee benefit plan comes with important duties and responsibilities. This session will provide an overview of those duties and responsibilities and discuss tips on how to best serve the Plan and fulfill your fiduciary duties. It will also address how the actions of other fiduciaries can affect you and the importance of understanding the plan and compliance with legal requirements. This session will also address preparing for and defending audits from the Internal Revenue Service and the Department of Labor. Finally, it will address the nature of fiduciary liability insurance, filing claims, who should be covered, and other important considerations.

8:00 AM – 9:00 AM CLE — Water Wars!
Sponsored by ONE400
Speaker: Bill Staudenmaier, Law Offices of Snell & Wilmer, Phoenix, AZ
Session Description: Mark Twain is rumored to have said, “In the West, whiskey is for drinking. Water is for fighting.” Former UN Secretary General Kofi Annan said that the wars of the 20th Century were over oil, but the wars of the 21st Century will be over water. This session will provide an overview of water law and then examine aspects of that law based on current water disputes. These will include state general stream adjudications, interstate water disputes over transboundary rivers, constitutional and human rights claims on water resources, and legal conflicts over international rivers.

9:15 AM – 10:15 AM CLE — Developing Issues Affecting LGBT Immigrant Communities
Speakers: Karina Ordonez, Karina Ordonez Law Office, Phoenix, AZ
                  Daniel Rodriguez, Díaz, Rodríguez & Associates, Phoenix, AZ
Session Description: Attorneys Daniel A. Rodriguez and Karina Ordonez will discuss developing issues affecting the LGBT community in Criminal Defense, Immigration and Family Law. The Supreme Court’s decision in Obergefell v. Hodges has generated a field of issues affecting LGBT families in matters including dissolution of marriage and adoption. Furthermore, after Obergefell, same-sex marriages became eligible for federal immigration relief. Finally, the continually expanding intersection of criminal and immigration law is affecting the LGBT community in a unique way with issues related to detention and solitary confinement. This session will provide a general overview of these developing issues.

9:15 AM – 10:15 AM CLE — Responding to a Data Breach
Sponsored by LegalShield
Moderator: Keri Coleman Norris, LegalShield, Ada, OK
Speakers: Brian Lapidus, Kroll, Nashville, TN
                  Jennifer Stueckler, LegalShield, Dallas, TX
Session Description: When the personal information of individuals is unexpectedly exposed by an organization, many eyes are watching. From legislators to shareholders, consumers and shoppers, to patients and students, people expect the wrong to be made right. Attendees will learn what happens if your client gets it wrong; what to do when expectation is not reality; how to give impacted individuals and interested onlookers the most confidence in a company's ability to set things straight and reduce the likelihood of another breach; and how employee benefit choices prior to a breach can provide additional support and reduce overall employee risk.
Session Descriptions

Speaker: Scott Dunbar, Mercer, Inc., Portland, OR
Session Description: There has been a significant increase in ERISA litigation over the last decade. While the concept of fiduciary responsibility contained in ERISA has been largely unchanged for over 40 years, the fact situations and the application of the law to those fact situations continues to evolve. Using 10 current retirement plan investment issues as examples, this presentation will give attendees practical steps that clients (and legal counsel) can implement to reduce risk for plan fiduciaries while potentially improving outcomes for plan participants.

10:30 AM – 11:30 AM CLE — Building a “Lead” Generating System for Your Law Firm
Speaker: Kerry Lavelle, Lavelle Law, Ltd., Palatine, IL
Session Description: Everyone talks about “client development” and “cultivating new clients,” but does every firm really have a lead generating system? Not many do. In this session we will discuss building a system that can withstand changes in the economy and the business environment and keep a new stream of clients flowing into your law office monthly, without fail. It is not easy, but once the architecture for the lead generation system is built, the system will insure a constant flow of new, great, clients, while improving management of legal work and reducing stress in law practice.

10:30 AM – 11:30 AM CLE — Leveraging Technology for Law Office Efficiency
Session Description: Do you want to run a modern and efficient office? Learn how to operate a 21st century paperless office, which can conduct business from anywhere, at any time, with the most ruthlessly efficient uses of technology. From cloud based practice management to virtualized PBX phone systems, remote receptionists and efficient billing to automated marketing, faxing without fax machines and filing without paper, it’s time to embrace how technology can let you work your own way.

10:30 AM – 11:30 AM CLE — Off the Reservation: Native Cultural Appropriation and The Law
Speakers: Lisa Atkinson, Law Office of Lisa L. Atkinson, PLLC, Seattle, WA
Esther Hyun, Hyun Law Firm, Seattle, WA
Session Description: This session will examine unconscious bias against Native Americans, as well as historic and current use/misuse of Native American imagery, symbols, designs, etc., to provide an educational session on the injuries (mental, spiritual, and financial) the appropriation of culture has on Native communities. Topics covered will include racist images and words commonly used by private industry for profit, as well as case studies on the appropriation of designs, symbols, and art as protected under the Indian Arts and Crafts Act of 1990 et. seq. and other applicable laws.
### Session Descriptions

#### 1:45 PM – 2:45 PM
**CLE — The Wellness CLE Part I: Prioritizing Mindfulness in Your Practice**

**Speakers:**  
Michael W. Albee, Albee Law Firm, Phoenix, AZ  
Nicole Ballantyne, High Vibe Lifestyles, Phoenix, AZ

**Session Description:** This session will look at establishing your priorities and learning to meet them on a daily basis. If you cultivate them as often as possible, giving them maximum effort, then you can maximize your success. Unfortunately, most of us don’t prioritize mindfulness as attorneys or encourage our law business staff to do the same. During our session we will discuss the importance of mindfulness and techniques for practicing mindfulness on a daily basis, with the goal of making wellness management a central component of successful law practices. Our session includes a demonstration from a certified yoga instructor of a short yoga sequence that can be practiced in the office.

#### 3:00 PM – 4:00 PM
**CLE — The Wellness CLE Part II: More Secrets of Conscious Lawyers**

**Speaker:** Melanie Bragg, Legal Insight, Inc., Houston, TX

**Session Description:** Melanie Bragg, contributing author of the ABA GPSolo eReport bimonthly column on Mindfulness, will discuss roads to finding peace and wellness in the midst of a turmoil-filled world, beyond those covered by Part I of this program. We will do a meditation, as well as discuss other techniques for practicing the art of presence. By becoming a “Conscious Lawyer” not only will you be happier, and have more energy, but you will be able to handle the inherent stresses of your practice and will be able to more efficiently and effectively handle client problems. With a little bit of effort, you can see dramatic changes in the way you relate to the world around you. This session is designed especially for attendees looking to be active in mind, body, and spirit. Attendees will walk away with a variety of resources to help them continue their journey to mindfulness.

#### SATURDAY, MAY 20

#### 9:00 AM – 10:00 AM
**CLE — Balancing Ethical Considerations with Emerging Technologies**

**Speakers:** Joseph P. Foley, Law Offices of Joseph P. Foley, Mission Viejo, CA

**Session Description:** This presentation will cover the most up to date information on the rapidly changing technology used in the law office and how technology can empower attorneys to start their own practice. You’ll learn about current trends in the law; current state bar rules governing the attorney/client privilege; how that privilege needs to be protected given current trends in technology today; how an attorney should address ethical issues of privacy and confidentiality between the client and attorney; emerging best practices being used today to ensure secure communications with clients and protection of data. Finally, the presenters will review ethical considerations for attorneys who participate with legal services plans, including legal ethics in general, the ABA Model Rules vs the individual state bar rules, multi-jurisdictional practice, and the use of electronic communications and social media.

#### 10:15 AM – 11:15 AM
**CLE — Crowdfunding Litigation: How, Why, and When**

**Speakers:** Kip Wainscott, CrowdJustice; Washington, DC  
Alexis Blane, CrowdJustice; Brooklyn, NY

**Description:** The costs of bringing litigation can be daunting. Crowdfunding, which is projected to channel more than $300 billion annually by 2025, can be a powerful tool for supporting legal cases. This seminar will outline the various types of crowdfunding, explore regulatory and ethical considerations, and examine case studies.
**GPSolo Book Discount for 2017 Joint Spring Meeting Attendees Only!**

**SAVE 20%**

Check out GPSolo’s new and best-selling books and save 20% when you place an order at the meeting. GPSolo books cover a wide range of topics and provide practical information to help you better serve your clients and enhance your practice. Books and order forms are available at the Expo.

---

**Session Descriptions**

**10:15 AM – 11:15 AM**

**CLE — Improve Your Professional Skill Set with Poker Strategy: Lessons for Lawyers, Trustees and Entrepreneurs**

**Speaker:** Kelly Minkin, Kent & Wittekind, PC, Phoenix, AZ

**Session Description:** Discussion of strategic components of approaching poker as a “winning” player, and how they can be incorporated into your professional career. This includes risk assessment, negotiations, honing your intuition, and sizing up your adversaries. The session will also incorporate lessons on the importance of relating to and understanding your opponent, and how to maximize your earning potential with this in mind. Effective strategy on a case-by-case basis will also be discussed, with examples in poker and respective professional parallels. The lesson will be accompanied by a PowerPoint presentation with an outline of all learning materials.

---

**11:30 AM – 12:30 PM**

**CLE — The Future of Legal Services**

**Speakers:** Michael Bennett, Center for Science and the Imagination and College of Law at Arizona State University, Phoenix, AZ
Thomas Martin, Foresight Legal, Long Beach, CA and Vancouver, BC, Canada

**Session Description:**

**Part I:** Tom Martin’s *Embracing the Law Robot Revolution*. Will lawyers be replaced by robots? In this presentation, legal tech innovator and lawyer Tom Martin will discuss recent developments in chatbots, artificial intelligence, machine learning and the future of law. You will gain an understanding of where the legal industry is headed and how you can benefit from the law robot revolution.

**Part II:** Michael Bennett’s *SciFi Visions of the Legal Future*. Contemporary legal practice is becoming science fictional. The frequency with which novel and arcane technological problems trigger legal controversies that bedevil practitioners, the increasingly common basis of the best legal consultants’ advice to firms about how to thrive in the 21st century, and the growth of science fictional references in legal teaching and writing all point to this transition. This session describes in detail three specific and plausible future developments that would represent new and complex puzzles, but also opportunities for small practices and solo practitioners: the emergence of internally displaced populations; the growth of marginal celebrity figures; and the birth of the legal futures industry.
GPSolo Leadership Dinner (Invitation Only)

GPSolo Leadership and their guests are invited to experience one of Scottsdale’s premier steakhouses, conveniently located within the Fairmont Scottsdale Princess resort. Acclaimed Chef, Michael Mina, offers contemporary American fare in an upscale and modern atmosphere. Bourbon Steak has earned the AAA’s prestigious Four Diamond award each year since opening in 2008. Come, sit back, relax, and enjoy. Bon Appetite!

**Date:** Wednesday, May 17  
**Time:** 6:30 PM – 10:00 PM  
**Location:** Bourbon Steak, Fairmont Scottsdale Princess  
**Dress Code:** Business casual. No shorts or t-shirts. Polo shirts are acceptable.  
**Cost:** $100 per person  
**Note:** Limited seating is available!

Local Mixer — Beyond Law and Order: Writing Stories for the Screen and Page

Peter Blauner, a veteran crime novelist and co-executive producer for the television series *Law & Order: SVU* and *Blue Bloods*, will talk about how he develops storylines for books and shows. Topics will include taking inspiration from real life criminal cases, why some stories work for the page and others for the screen, and when it’s useful to consult actual lawyers and when it’s best to deviate from strict legal procedure to create a dramatic narrative. The presentation will also involve scenes from shows Blauner has worked on and audience participation in storytelling exercises, with a chance for attendees to present work created at the session. A brief question-and-answer session and book signing will follow.

**Date:** Wednesday, May 17  
**Time:** 7:00 PM – 9:00 PM  
**Location:** Palomino Ballroom I, Fairmont Scottsdale Princess  
**Cost:** The session is free to conference registrants, and members of the public registering in advance on [Eventbrite](#). Please note, books may be purchased on-site.
Social Events

Opening Session, with First Timers Meet and Greet and Meet the GLSA Board Candidates

The Opening Session is a not to be missed opportunity to get all the details on the 2017 Joint Spring Meeting. This year, we will have a special guest, ABA President Linda A. Klein will be joining David and Keri in welcoming everyone. You’ll also get to meet the GLSA Board and GPSolo Council, listen to campaign speeches by candidates for three GLSA Board openings, and otherwise get warmed up for a wonderful evening at the Fairmont’s Copper Canyon.

Date: Thursday, May 18
Time: 5:15 PM – 6:30 PM
Location: Palomino Ballroom 2 and 3, Fairmont Scottsdale Princess

Welcome Reception

All aboard the caravan back to the Wild West! We’re going cowboy and cowgirl for an evening of food, cocktails, friendship and western-themed fun and games. And for the line dancers among you, overnight boot shining is available at Guest Services.

Date: Thursday, May 18
Time: 6:30 PM – 10:00 PM
Location: Copper Canyon, Fairmont Scottsdale Princess (Located near the Opening Session however, the resort’s on-site shuttle transportation service will be available if needed.)

Dress Code: Western attire is encouraged.
Cost: Included in Meeting / Guest Registration. Welcome Reception Ticket Only — $75.

Hospitality Suite

Sponsored by: Wolters Kluwer

Join other attendees for relaxation and conversation.

Date: Thursday, May 18
Time: 10:00 PM – 12:00 AM
Location: Canyon Lawn, Fairmont Scottsdale Princess
Social Events

Solo and Small Firm Awards Luncheon with GLSA Annual Meeting and Election

The Solo and Small Firm Awards celebrate the efforts and accomplishments of outstanding solo and small firm practitioners, as well as bar leaders and bar associations.

**Lifetime Achievement Award**

**Michael P. Hurley**

Nelson, Sweet & Hurley
Painesville, OH

This award recognizes solo and small firm attorneys who are widely accepted by their peers as having significant lifetime distinction, exceptional achievement, and distinction in an exemplary way. The winners will be viewed by other solo and small firm practitioners as epitomizing the ideals of the legal profession and of solo and small firm practitioners.

**Solo and Small Firm Trainer Award**

**Jeffrey M. Allen**

Graves & Allen
Oakland, CA

This award recognizes attorneys who have made significant contributions to educating lawyers or law students regarding the opportunities and challenges of a solo and small firm practice.

Please see the GPSolo Division’s [Awards page](#) for additional information and a list of past honorees.

**GLSA will be holding their Annual Meeting and Board election during this time too.**

**Date:** Friday, May 19

**Time:** 11:45 AM – 1:15 PM

**Location:** Palomino Plaza North, Fairmont Scottsdale Princess

**Cost:** Included in Meeting / Guest Registration. Luncheon Ticket Only — $55.
Social Events

Golf Tournament
This Golf Tournament promises to be a great afternoon with lots of networking opportunities. Join your peers and industry partners for some friendly competition. The Golf Tournament will be held on property at the most recognized Scottsdale Golf Resort, Home to the Waste Management Phoenix Open. Luxury and service don’t stop at the front drive, it comes along with the game for a first-class golf experience.

Date: Friday, May 19
Time: 2:00 PM – 6:30 PM (Meet in the hotel lobby at 1:15 PM)
Location: Champions Golf Course, 17020 N. Hayden Rd., Scottsdale, AZ
Cost: Preregistration Required — $85 per person. The registration fee includes greens fees, cart, practice balls, bag service gratuities, and transportation to and from the course.
Rentals: $75 for clubs, $25 for shoes. Approximately 30 days prior to the event, you will be contacted to reserve your clubs and/or shoes, if needed.
Format: Shotgun (4 players/team) — Fewer than four players? We can fit you into a foursome.

Hospitality Suite
Join other attendees for relaxation and conversation.

Date: Friday, May 19
Time: 10:00 PM – 12:00 AM
Location: Princess Pool Overlook, Fairmont Scottsdale Princess
Looking Forward to 2018 & Saturday Afternoon Event — MIM

Sponsored by: ONE400

Over brunch cocktails and mocktails, get a sneak peek at the year ahead with us. GPSolo member and GLSA President, Jean Clauson, will be your host for those good times before we ride over to The Musical Instrument Museum — rated TripAdvisor’s #1 attraction in Phoenix, Arizona.

After lunch at the museum’s Café Allegro, a docent will lead us on an overview tour of the museum before inviting us to explore its global collection of famous, bizarre and historic instruments (and their sounds) on our own. So if you like playing air guitar when you think no one’s watching, just wait until you get to play with a real one in your own makeshift band here. That is, if you’re not too busy studying the lamellaphone, the pennywhistle, and the thousands of other familiar and foreign instruments on exhibit at MIM, or taking in a live Polynesian concert that’s sure to leave you humming paradiisiac tunes all the way home.

Date: Saturday, May 20
Time: 12:30 PM – 4:00 PM, with our group’s tour at MIM beginning at 2:15 PM
Start Point: Palomino Ballroom I, Fairmont Scottsdale Princess
End Point: Musical Instrument Museum, 4725 E. Mayo Blvd., Phoenix, AZ
Cost: Museum entry with group tour is $20 per person for adults (cash only), with an additional $7 for the special exhibition Dragons and Vines: Inlaid Guitar Masterpieces. You can pay for your lunch and museum admission with group tour when you arrive at the MIM! Transportation is on your own.

On Your Own Optional Activities

Frank Lloyd Wright’s Taliesin West — Night Lights Tour
Fall in love with the starry desert during this romantic evening tour of Taliesin West, architect Frank Lloyd Wright’s winter home and school from 1937 until his death in 1959. Lemonade and snacks will be served as you take in the fire-breathing dragon installation and other spectacular sights. This option is recommended for non-golfers, with Tex Mex dinner at the nearby Blue Adobe Grille (10885 N. Frank Lloyd Wright Blvd., Scottsdale, AZ) before or afterward.

Date: Friday, May 19
Duration: 2 hours
Times: 6:00 PM, 6:30 PM or 7:00 PM (25 tickets are available for each slot)
Location: Taliesin West, 12621 N. Frank Lloyd Wright Blvd., Scottsdale, AZ (20 minutes by car from the Fairmont Scottsdale Princess)
Cost: $40 per person for the Night Lights tour. Reserve tour tickets by calling Taliesin West at 480-627-5340 by May 12. Transportation and dinner is at your leisure and independent of the tour cost.
On Your Own Optional Activities

**MacDonald’s Ranch — Moonlight Horseback and Stagecoach Rides**
As seen on ABC’s *The Bachelorette*: Friendly, old-timey wranglers guide you through the desert as the sun sets and the moon rises. Along the way, you’ll see owls hunting, hear coyotes singing and marvel at stars shining. This is a great option for families and nature lovers! It’s recommended for non-golfers, with dinner at the ranch or the nearby Carvalho’s Brazilian Kitchen (23623 N. Scottsdale Rd.) afterward.

**Date:** Friday, May 19

**Duration:** 45 – 90 minutes

**Time:** 6:30 PM

**Location:** MacDonald’s Ranch, 26540 N. Scottsdale Rd., Scottsdale, AZ

**Cost for Horseback Rides:** 1 hour — $85 adult, $80 children; 90 minutes — $100 adult, $95 children

**Cost for Stagecoach Rides:** 45 minutes — $85 adult, $80 children

**Reservations:** 480-585-0239 in advance. Dinner is at your leisure and independent of the tour cost.

**Escape the Room AZ — Interactive Team Adventure and Puzzle**
You’ve got just ONE HOUR to get with this global craze that has taken even the Obamas by storm! Here in Old Town Scottsdale, embark on a timed mission to escape your apartment before your roommates get too obnoxious, flee the 1980s before you get stuck there forever, rob a bank and get out with all the loot before the sheriff captures you, or unravel the mysteries of an archaeological site before eternal darkness descends. This thrill seekers’ option is recommended for golfers AND non-golfers, before or after a dinner of upscale Latin cuisine at The Mission in Scottsdale’s Old Town (3815 N. Brown Ave., Scottsdale, AZ).

**Date:** Friday, May 19

**Duration:** 60 minutes

**Time:** 5:30 PM — 10:00 PM (Each escape room’s availability may vary.)

**Location:** Escape the Room AZ, 7017 E. Main St., Scottsdale, AZ

**Cost:** Prices vary depending on the room type ($28 – $56 is the average range.)

**Reservations:** Book online at escapetheroomaz.com. Dinner is at your leisure and independent of the tour cost.

**Topgolf — Golf at a High-Tech Driving Range**
Tee up at a futuristic course once our afternoon golf tournament is over! The Topgolf food, beverage and entertainment complex offers a variety of competitive games that combine the best of bowling, darts and golf. NOTHING VIRTUAL ABOUT IT! You don’t have to be a golfer to enjoy the games, or the foodie-approved eats and drinks around them. But if the menu doesn’t do it for you, tease your taste buds for our 2018 New Orleans conference with Creole seafood — less than half a mile away at Ocean Trail restaurant (9800 E. Indian Bend Rd., Scottsdale, AZ).

**Date:** Friday, May 19

**Time:** 7:00 PM – Late Night. Reservations are not required.

**Location:** Topgolf, 9500 Talking Stick Way, Scottsdale, AZ

**Cost:** $45 per hour per bay, with 1 – 6 golfers per bay
The Hottest Bars and Restaurants
Recommendations from our Members and Speakers

**Mary Juetten**
Presenter of *Law Practice Management: Key Performance Indicators Simplified*
*Barrio Queen* Tequila and anything on the food menu!

**David Lefton**
Chair of ABA GPSolo
*The Mission* — a great Mexican restaurant in Old Town Scottsdale.

**Chris Marohn**
Chair of the volunteer law triage clinic at Arizona State University
*Zinburger* The Ringer with Loaded Fries and a Salted Carmel Shake. And water... because it is hot in Arizona.

**Alan Klevan**
Presenter of *Adobe Acrobat: For the Love of Your Practice*
I cannot wait for the Stetson Chop at *Cowboy Ciao!!!* Or the pork belly pastrami at *Citizen Public House*!

**Mike Albee**
Co-presenter of *The Wellness CLE Part I: Prioritizing Mindfulness in Your Practice*
My favorite food and drink in Scottsdale is a cheese board and a glass of wine at *Kazimierz World Wine Bar* in Scottsdale. There’s nowhere else in Scottsdale where you can enjoy comfortable couches and be transported to an Old European City all in one sitting.

**Kelly Minkin**
Presenter of *Improve Your Professional Skill Set with Poker Strategy*
I am a big fan of *POSH Improvisational Cuisine*. You select how many courses you want, with wine pairings if you like, and any ingredients you don’t want used...and then you are surprised with every course! Super fun and great food and atmosphere.

**Billie Tarascio**
Arizona attorney and GLSA teleconference presenter
*Postino* has great food and wine! Old Town is a blast and you can find just about anything. *Brat Haus* has amazing pretzels and a great selection of beers.
The Hottest Bars and Restaurants
Recommendations from our Members and Speakers

Florence Bruemmer
Panelist for How to Be a Successful Legal Plan Provider Attorney
I love Kona Grill. There is a location at Fashion Square Mall (7014 E. Camelback Road) in Scottsdale. They have sushi and American dishes. I love the Sushi Sampler. It’s 11 pieces of sushi and a spring greens salad.

Lisa Atkinson
Presenter of Off the Reservation: Native Cultural Appropriation and The Law
I love the Old Tortilla Factory in Old Town Scottsdale. They make fresh tortillas all day and serve them as free appetizers with flavored butter. Their food is also good, and I’m told the Margaritas are fantastic (I don’t speak Tequila). Sit on the patio.

Melanie Bragg
Presenter of Cross-Marketing Your Publications and Your Practice and The Wellness CLE Part II: More Secrets of Conscious Lawyers
I just stay onsite when I am there, so I love the hotel restaurants like Ironwood and La Hacienda. They have great conference food too.

Sally Robertson
Panelist for The State of the Industry: What’s Next?
I love True Food Kitchen by the Fox Restaurant Group in Scottsdale. In particular, their Honey Bee Ginger Beer and Edamame Dumplings are amazing!

Rochelle N. Poulton
Presenter of Understanding Credit Scores
My favorite food and drink in Scottsdale is at Hula’s Modern Tiki. I love the Crunchy Spicy Chicken Tacos with their Mai Tai! BTW—they have an awesome happy hour. 😊

Michael Bennett
Presenter of SciFi Visions of the Legal Future
Not counting my own version of a Bennett cocktail, my favorite drink in the area is the Chambord Margarita at Z’Tejas.

Eileen Sullivan
GPSolo member, GLSA Board member and Scottsdale native
My favorite food in Scottsdale is bahn xao (Vietnamese crepe) or cha gio(eggrolls). I can get it from Mom. :) I also really like the chopped salad at Cowboy Ciao or sister restaurant Citizen Public House.
Registration
Excluding speakers, all persons must be registered to attend the 2017 Joint Spring Meeting. You may register for the meeting at the links below. A Registration Badge includes access to the following: expo, Wednesday dine-around, CLE sessions, committee meetings, one copy of CLE materials, breakfasts, breaks, hospitality suites, Thursday receptions, and Friday luncheon held at the Fairmont Scottsdale Princess. An additional registration fee may be required to attend certain social events.

Register on-line for the 2017 Joint Spring Meeting on the GLSA website (www.glsaonline.org) or GPSolo website (www.ambar.org/GPSoloSpringMeeting). Questions about registration can be directed to GPSolo at 312-988-5648 or GLSA at 312-988-5751.

Register by May 3 to avoid paying an additional $100 for late registration. Conference registrations will not be completed until full payment has been received by either GLSA or GPSolo.

Registrations must be completed by May 10 for attendees to be listed on the Advance Registration list published for conference attendees.

Scholarships to defray tuition expense for GPSolo and GLSA programs are available upon application on a program-by-program, case-by-case basis. Preference will be given to public interest lawyers, government lawyers, full-time law professors, solo or small firm practitioners of limited means, and unemployed attorneys. A minimum fee may be charged on all approved scholarship applications to defray expenses. For programs with tuition costs over $500, qualifying attorneys will receive at least a 50% reduction in the course fee(s).

Guest Tickets
Guest badges may be purchased, which will grant access to the Expo, breakfasts, breaks, Thursday receptions and Friday luncheon held at the Fairmont Scottsdale Princess. An additional registration fee may be required to attend certain social events. Please note that a Guest Badge is NOT the same as a Registration Badge. Entrance to CLE sessions is by Registration Badge only. Thank you for your cooperation.

Cancellation Policy
Cancellation information is available on the GLSA website (www.glsaonline.org) and GPSolo website (www.ambar.org/GPSoloSpringMeeting).

Session Materials
Now that our conferences are paperless, we are offering materials on a flash drive that will be distributed at the conference.

Consent to use of photographic images
Attendance at the 2017 Joint Spring Meeting constitutes an agreement by the registrant to GLSA and GPSolo (both now & in the future) for use of the registrant’s photographs at all events associated with the 2017 meeting. Any opposition to use of your photograph must be communicated in writing to the GLSA or GPSolo office.

Dress Code
The dress code is business casual for this meeting. To ensure your comfort, bring a sweater or jacket to your session, because the temperatures in the rooms and in the evenings may be cool.

Location
The conference is being held at the Fairmont Scottsdale Princess at 7575 E. Princess Dr., Scottsdale, AZ 85255. Its amenities will astound you. A special rate of $269 per single/double room has been negotiated. To take advantage of the

For the most current meeting information, download the mobile app.

The 2017 Joint Spring Meeting app will be available in May.

Mobile app provided by

THOMSON REUTERS™
**Hotel and Registration Information**

discounted rate, **book your room before 5:00 PM CST** on Wednesday, April 19. Available on a first come, first served basis, with a $12 per person One-Time Roundtrip Luggage Handling Charge + $2 per person Daily Housekeeping Service charge. Reservations after that date will be accepted by the hotel on a space-available basis and single/double rooms may not be available at our special rate. For reservations call 1-800-441-1414 and request a booking under 2017 Joint Spring Meeting (GPSolo and GLSA) or use the link below.

**Check-in:** 4:00 PM  
**Check-out:** 12:00 PM (Noon)

**Internet:** Basic wireless in room Internet service is complimentary.

**Reserve your room** [online here](#).

A list of conference attendees seeking roommates is available on our websites, and you can add your name to that list while Registering for the conference.

**Transportation**

The resort is approximately a 30 minute drive from Phoenix Sky Harbor International Airport. Transportation can be booked on your own or directly through the Fairmont at 480-585-4848.

**Rental Car:** Enterprise rentals are available at the airport and at the resort. The resort’s Enterprise Rent-A-Car desk offers the Enterprise Exotic Car Collection, which includes Bentley, Ferrari, Maserati, Tesla, Audi, Porsche, Range Rover and Mercedes vehicles.

**Shuttle:** $27 per person, each way from the airport to the resort, on Super Shuttle. The service is located outside of luggage claim at the airport. Call 800-730-9267 to book your return trip or visit the website at [www.supershuttle.com](http://www.supershuttle.com).

**Taxi:** Fees will vary. Taxis are located outside the luggage claim area at the airport. They can also be contacted at 602-200-2000 (Discount Cab) or 602-252-5252 (Yellow Cab).

**Towncar:** Car service can be booked for $80 – $105 each way to/from the airport. The resort’s recommend provider, Transtyle Town Car, can be contacted at 480-951-9639.

**Rideshare — Lyft and Uber:** Estimated cost is $25 – $34 each way. We recommend downloading these apps on your cell phones for use throughout the conference, as the resort does not offer free shuttle service.

**Self Parking:** $5 per vehicle, daily and overnight  
**Valet Parking:** $10 per vehicle, daily; $20 per vehicle, overnight

**Continuing Legal Education Credit**

The ABA directly applies for and ordinarily receives MCLE credit for ABA programs in AK, AL, AR, AZ, CA, CO, DE, GA, GU, HI, IA, IL, IN, KS, KY, LA, MN, MS, MO, MT, NH, NM, NV, NY, NC, ND, OH, OK, OR, PA, PR, SC, TN, TX, UT, VT, VA, VI, WA, WI, and WV. These states sometimes do not approve a program for credit before the program occurs. This transitional program is approved for both newly admitted and experienced attorneys in NY. This program is expected to qualify for 13.0 CLE credit hours including 1.0 ethics hour in 60 minute states, and 15.5 CLE credit hours including 1.0 ethics hour in 50 minutes states. Attorneys may be eligible to receive CLE credit through reciprocity or attorney self-submission in other states. For more information about CLE accreditation in your state, visit: [www.americanbar.org/cle/mandatory_cle.html](http://www.americanbar.org/cle/mandatory_cle.html).
26 Sonoran Desert Adventures and Mind Trips

1. Cheer for real cowboys at the Buffalo Chip Bull Rodeo in Cave Creek, AZ
2. Buckle up for a Jeep Tour of the beautiful Sonoran desert
3. Paddle along lush green riverbanks toward red cliffs on a Kayaking River Adventure
4. Feel the desert air whip past you as you Mountain Bike over the Southwest’s best trails
5. Experience first-person Native voices at the Heard Museum of American Indian Art & History
6. Toast the perfect morning with a Hot Air Balloon Ride over the desert
7. Cool off with an afternoon of Tubing Down the Lower Salt River
8. See the stars twinkle over the creatures of the night on a Moonlight Hike
9. Magically teleport into a tropical rainforest at the Butterfly Wonderland
10. Know your wildest history at Western Spirit: Scottsdale’s Museum of the West
11. Embark on a destination food tour via A Taste of Old Town Scottsdale
12. Enjoy a retail therapy session or two at Fashion Square Mall
13. Admire classic cars and motorcycles at the Rock and Roll Car and Bike Show
14. See trains miniature and mega, famous and obscure, at McCormick-Stillman Railroad Park
15. Check out the town’s burgeoning gallery scene on the Scottsdale Art Walk
16. Go deeper into the desert than most have ever gone before on a Tomcar Adventure
17. Speed things up a notch with kart racing at Octane Raceway
18. Let someone else take care of you with a Fairmont Well & Being Spa Treatment
19. Uncork your creativity with a wine and paint at Art of Merlot
20. Go “Oooh la la!” at Carnival of Illusion: An Evening of Old World Magic
21. Give yourself a workout at Arizona’s Largest Rock Climbing Gym
22. See the next best thing to a global arid-land safari at the Desert Botanical Garden
23. Board a pedal-powered, party bike for a Scottsdale Pub Crawl
24. Line dance with the Southwest’s best of ’em at Handlebar J Restaurant and Saloon
25. Get in a shape with aerial yoga or another Fairmont Fitness Class
26. Take a green tour of the Old Town with Scottsdale Segway Tours

Some of these activities can be booked through the Fairmont using this portal!
Save the Dates

GPSolo 2017
Solo & Small Firm Summit
October 19 – 21, 2017
The Saint Paul Hotel
Saint Paul, Minnesota

2018 Joint Spring Meeting
Presented by:
ABA Solo, Small Firm and General Practice Division
ABA Standing Committee on Group & Prepaid Legal Services
Group Legal Services Association
April 26 – 28, 2018
Sheraton New Orleans Hotel
New Orleans, Louisiana

We’d just love to see you again in New Orleans next year, but you needn’t wait until the Spring of 2018 for more GLSA and GPSolo programs. We offer education, fun activities and volunteer opportunities year-round to members.

For GPSolo membership, visit www.americanbar.org/gpsolo.

For GLSA membership, visit glsaonline.org/about/membership.
Thank you to our Sponsors and Exhibitors

ABA Solo, Small Firm and General Practice Division Sponsor — Premier

THOMSON REUTERS™

ABA Solo, Small Firm and General Practice Division Sponsors

Wolters Kluwer

ARAG

ABA Retirement Funds™

Tabs3
Reliable Software. Trusted Service.

Group Legal Services Association Sponsors

PINNACLE

LegalShield
Worry Less. Live More.

ONE400

PLATINUM

ARAG
foxwordy
Hyatt Legal Plans
A MetLife Company

SILVER

BROADLY
LAWPAY
Vonage

BRONZE

Meeting Sponsors and Exhibitors

ABB
ATTORNEY AT LAW
MAGAZINE
Casemaker
This leader in legal research
crowdjustice

LOS ABOGADOS
Hispanic Bar Association

PRACTICEPANTHER
THE RAINMAKER
INSTITUTE
salesgenie

USI AFFINITY

WHLM
Walter Hulbert
Gard & Moore, LLP