

10 Highlights for Your New Practice: 2022-2023

February 20, 2024

9:00 a.m. to 12:15 p.m.

Total CPD Hours = TBD

Webcast

Law Society of Ontario

SKU CLE24-0020100-D-WEB

Agenda

Topic 1

Rebooting Your Client Intake Process

Source Program: 17th Solo and Small Firm Conference -
Secrets for Success

Lisa Feldstein, *Lisa Feldstein Law Office Professional Corporation*

Jennifer Reynolds, *Fresh Legal*

Topic 2

Law Firm Infrastructure: The Building Blocks You Need (Staffing, Tech and Office Space)

Source Program: Reflecting on Your Practice: Tools to
Reset (or Build) Your Practice

Moderator: Jada Strawczynski, Director, practicePRO, *Lawyers' Professional Indemnity Company (LawPRO®)*

Panelists: Kirsti Mathers McHenry, *Mathers McHenry LLP*

Andrew Paterson, *Durant Barristers*

Tannis Waugh, C.S., *Waugh & Co. Barristers and Solicitors*

Topic 3

The Modern Lawyer's Marketing Blueprint

Source Program: 17th Solo and Small Firm Conference -
Secrets for Success

Romesh Hettiarachchi, *Signal Lawyers / Lawtrepreneur*

Andrew Leroy Rudder, *Rudder Law Group*

Topic 4

**Best Practices for Retainer Agreements and Confirming
the Essential Details with your Client**

Source Program: The Retainer Agreement Explained

Amri Murray, *AJ Murray Legal Services, P.C.*

Topic 5

**Managing the Litigation Process and the Client
Relationship**

Source Program: Family Law Refresher 2023

Annie Kenet, *Goldhart Kenet LLP*

Break

Topic 6

Law Society Spot Audits: Five Most Common Issues

Source Program: 20th Real Estate Law Summit

Andrew Assikopoulos, CPA, CA, CMA, Auditor, Spot Audit,
Law Society of Ontario

Mandy Chan, BBA (Accounting), DIFA, CA, CPA, Auditor,
Spot Audit, *Law Society of Ontario*

Topic 7

Business Strategies for a Shift to Part-Time or Alternative Practice

Source Program: A Guide for Law Practice Transitions to Part-Time and Alternative Practice Arrangements

Erin C. Cowling, Founder & CEO, *Flex Legal Network Inc.*

Topic 8

How not to be the Next Fraud Dupe or Victim!

Source Program: 20th Real Estate Law Summit

Raymond Leclair, Vice-President, Public Affairs, *Lawyers' Professional Indemnity Company (LawPRO®)*

Topic 9

Finances Rapid-fire Roundtable: Setting Your Fees, Setting a Budget and Staying on Track

Source Program: Reflecting on Your Practice: Tools to Reset (or Build) Your Practice

Juda Strawczynski, Director, practicePRO, *Lawyers' Professional Indemnity Company (LawPRO®)*

Peter Carayiannis, *EY Law LLP*

Amy Grubb, *Grubb Legal Consulting*

Topic 10

Remote Work: New Risks, New Challenges

Source Program: Technology and the Law

Moderator: Amy Salyzyn, Associate Professor, Faculty of Law, *University of Ottawa*

Panelists: Kevin Lo, Managing Director, *Froese Forensic Partners Ltd.*

Florian Martin-Bariteau, Associate Professor, Faculty of Law, *University of Ottawa*

Dr. Teresa Scassa, Canada Research Chair in Information
Law and Policy, Faculty of Common Law, *University of
Ottawa*

Program Ends