



Pennsylvania Bar Association
Solo & Small Firm Section
Annual Conference

 #PBAsolo17

July 19-21, 2017
Omni Bedford Springs Resort

Few properties can boast the historic significance and luxurious accommodations of the Omni Bedford Springs Resort. Located in the scenic Cumberland Valley of southern Pennsylvania, the resort has served as an important gathering place for more than 200 years, and it will once again provide the ideal setting for the 2017 PBA Solo and Small Firm Section Annual Conference.

This must-attend event for all solo and small firm attorneys from across the commonwealth features tips to build your practice, insights from esteemed members of the judiciary and sessions to build your knowledge in child custody, the new Title 15 rules, medical marijuana, juvenile dependency and delinquency, federal and state drone law, disaster recovery and much more.

Just 90 minutes from Pittsburgh and Harrisburg and three hours from Philadelphia, the Omni Bedford Springs Resort offers unrivaled amenities, beautiful surroundings and many on-site activities, including golf on the resort's restored historic course, rejuvenating treatments at the Eternal Springs Spa and two refreshing pools. Conference attendees will be able to use the Thursday afternoon scheduled free time to enjoy these or the numerous additional on-site and nearby activities with fellow section members and conference attendees.



CLE CREDITS



The Pennsylvania Bar Institute is approved by the Pennsylvania Supreme Court Continuing Legal Education

Board as an accredited CLE provider.

Our conference has been approved by the Pennsylvania Continuing Legal Education Board for 11 CLE credits, including ethics.

COURSE MATERIALS

Covered by your registration fee, a URL secure link will be emailed to all registrants prior to the conference for you to download, view and print CLE materials. The materials are not available for separate purchase.

PLATINUM SPONSORS



RESORT RESERVATIONS

A block of sleeping rooms has been reserved at the Omni Bedford Springs Resort. Call Reservations at 1-800-843-6664 or go online at www.omnihotels.com/hotels/bedford-springs/meetings/pa-bar-association-solo-and-small-firm by 5 p.m. on Friday, June 16, to obtain the special PBA meeting rate. Identify yourself as a participant in the Pennsylvania Bar Association Solo & Small Firm Section Conference. Deluxe room rates are \$199 per night plus taxes for standard (single or double occupancy) accommodations and a \$10 per day discounted resort fee plus taxes (per room, per night) applies. Check-in time is 4 p.m. and check out time is 11 a.m.



Accommodations: Omni Bedford Springs Resort guest rooms include plush bedding, 32" flat screen HD TVs, two phones (one being cordless), clock radio with iPod docking station, in-room coffee, mini-refrigerator, beautifully appointed bathroom with make-up mirror and vanity. Deluxe guest rooms are located throughout the resort and feature king, queen or two double beds.



Additional services included: Unlimited high speed internet access in all accommodations; Bedford Springs bottled water; morning newspaper; local telephone calls; in-room coffee; valet parking; room safe; 24-hour indoor heated pool access; tennis court; hiking trails; afternoon tea; 24-hour fitness center; 24-hour business center; and five dining options.

SPA

Springs Eternal Spa, a 30,000-square-foot destination spa, is one of the few spas in the country utilizing natural spring water in all of its treatments. Sample the historic "Bedford Baths" using their signature indigenous product line inspired by native herbs and botanicals, unwind with a soothing massage or beauty treatment or simply spend a few moments in the serene spa garden. For advanced spa reservations, please call 814-624-5633.



GOLF

The Omni Bedford Springs Golf Resort offers a fantastic golf course that has been ranked as high as #1 in Pennsylvania among public and resort courses. The course was designed by two of the most celebrated course architects in history, A.W. Tillinghast and Donald Ross. Attendees of the Solo and Small Firm Conference can reserve discounted online golf tee times at www.omnihotels.com/hotels/bedford-springs/golf/book-tee-time. The promo code is PABAR and must be entered on the website when making golf reservations in order to receive the discounted group rate of \$155 per person. This group rate is available from July 19 – July 24.

Resort Golf Attire — All players must adhere to the golf attire guidelines. Gentlemen must wear long slacks or knee length shorts and a collared or mock neck golf shirt. Ladies may wear slacks, skirts, skorts or shorts — please no shorter than just above the knee. Ladies shirts must have a collar or sleeves but may not lack both. No tee shirts, tank tops, denim, bathing suits or tube tops permitted. The Pro Shop offers a complete line of men's and women's golf attire!



ADDITIONAL ON-SITE ACTIVITIES

- Off Road Vehicle Tours
- Cooking Demonstrations
- Yoga
- Fire Pit
- Hiking
- Biking
- Tennis
- Fly Fishing
- Geocaching
- Lawn Games

NEARBY ATTRACTIONS AND ACTIVITIES

- Wine Tastings
- Horseback Riding
- Covered Bridges of Bedford County



Wednesday, July 19, 2017

2:30 p.m. – 7:00 p.m. Registration

3:30 p.m. – 4:30 p.m.

Client Intake and Satisfaction (CLE 301)

Every communication with a client or potential client is critical for a successful law firm. If you don't have clients, you don't have a practice. Once you have clients, ensuring they are handled properly from intake through the end of case is paramount. PBA Law Practice Management Coordinator Ellen Freedman kicks off another amazing conference as she explains how to bring in clients, how to keep them happy, and how to leave them content and satisfied after the case is over.

Speaker: Ellen Freedman, PBA Law Practice Management Coordinator

CLE Program: 1.0 substantive hour credit

4:30 p.m. – 4:45 p.m. Break

4:45 p.m. – 5:45 p.m.

Hot Tech Tips (CLE 302)

During this fast-paced new panel, you will discover technology tips to keep your practice running smoothly. Presenters will share some of their secrets for using technology in a solo and small firm practice setting.

Speakers:

Ellen Freedman, PBA Law Practice Management Coordinator

Jennifer Ellis, Lowenthal & Abrams PC

David Narkiewicz, Assistant Chief Counsel, Department of General Services, Commonwealth of PA

Levi Wolf, Wolf Baldwin & Associates PC

CLE Program: 1.0 substantive hour credit

6:30 p.m. – 7:30 p.m. Opening Reception

7:30 p.m. Dinner on own

Thursday, July 20, 2017

7:00 a.m. - 2:00 p.m. Registration

7:00 a.m. – 8:00 a.m. Continental Breakfast

8:00 a.m. – 9:00 a.m.

Hot Tips (CLE 303)

Forty-five rapid-fire tips from the following areas of the law will be presented: Business, Real Estate, Family, Criminal, Employment, Civil Rights, Bankruptcy, Franchise and Shale.

Moderator: Kenneth P. Milner, Kraut Harris PC

Speakers: Rita G. Alexyn, Rita G. Alexyn Law Office

Sara A. Austin, PBA Solo and Small Firm Section Chair, Austin Law Firm LLC

Harold M. Goldner, Kraut Harris PC

William H. Higgins Jr., District Attorney, Bedford County

Anne N. John, John & John

CLE Program: 1.0 substantive credit hour

9:00 a.m. – 9:15 a.m.

Break

9:15 a.m. – 10:15 a.m.

Appellate Advocacy (CLE 304)

This informative session will focus on appellate advocacy, including oral argument and brief writing, as well as the jurisdiction and differences in appeals before the Supreme Court and Superior Court.

Speakers:

Justice Debra Todd, Supreme Court of PA

President Judge Susan P. Gantman, Superior Court of PA

CLE Program: 1.0 substantive credit hour

10:15 a.m. – 10:30 a.m.

Break

10:30 a.m. – 11:30 a.m.

Cybersecurity (CLE 305)

One in four law firms admit that their data has been breached. However, since most firms are unaware that their data is vulnerable and suffered an attack, the actual statistic is unnervingly higher. This session reveals the financial, legal, ethical and public relationship risks involved if you fail to



keep your client data safe. Discover what you need to do to protect yourself and your clients.

Speakers:

Jennifer Ellis, Lowenthal & Abrams PC

Ellen Freedman, PBA Law Practice

Management Coordinator

CLE Program: 1.0 ethics credit hour

10:30 a.m. – 11:30 a.m.

Child Custody in Today’s Family (CLE 306)

Child custody law in Pennsylvania is rooted in the concept of the traditional “Biblical family.” Over time, with the recognition of marriage between individuals of the same sex, with second and even multiple marriages, and with parents being unable or unwilling to parent their own children, the definition of “parents” has greatly expanded, and our laws have changed to meet the needs of the modern family. This program highlights current Pennsylvania law with respect to grandparents, same sex couples, and those in loco parentis. Join us for an exciting hour of the status of Pennsylvania child custody law.

Speakers:

Rita G. Alexyn, Rita G. Alexyn Law Office

Kim D. Morton, Morton Family Law LLC

Mary E. Schellhammer, Attorney at Law

Margaret T. Lucas, Attorney at Law PC

CLE Program: 1.0 substantive credit hour



10:30 a.m. – 11:30 a.m.

Title 15 Update (CLE 307)

Do you work with any type of Partnership, LLC, Business Corporation or Not-for-Profit Corporation? If so, you should know about Act 170 which became fully effective in April 2017. Join us to learn about the changes

that will affect your clients, what you need to do to effectively represent them, and the resources available for in-depth research.

Speaker: Jeffrey A. Franklin, Prince Law Offices PC

CLE Program: 1.0 substantive credit hour

11:30 a.m. – 11:45 a.m.

Break

11:45 a.m. – 12:45 p.m.

Quality of Life (CLE 308)

Join experienced attorneys from the PBA Quality of Life/Balance Committee who will provide explanations and examples of how mindfulness can be used to help maintain a balance in life and work. This presentation is specifically designed to assist managing attorneys incorporate mindfulness into their personal practice while extending the concept to personnel who support them.

Speakers:

Christopher G. Gvozdich, Gvozdich Law Offices

Kathleen D. Wilkinson, Wilson Elser

Moskowitz Edelman & Dicker LLP

Erin M. Siciliano, Wilson Elser Moskowitz Edelman & Dicker LLP

CLE Program: 1.0 ethics credit hour

11:45 a.m. – 12:45 p.m.

Medical Marijuana in the Legal Industry: The Key Issues for Solo Practitioners and Small Firms (CLE 309)

This seminar will provide attendees with an overview of Pennsylvania’s Medical Marijuana Act and the lawyers’ role in this developing industry. Whether your practice is general in nature or boutique, issues surrounding this new law could unexpectedly cross your desk. While the medical marijuana program begins to take shape in Pennsylvania, practitioners are already confronting unique legal challenges in the form of lease negotiations, banking needs, municipal relations and more. Here, you will learn how to identify and resolve some of the most common issues in this emerging legal market.

Speaker: William G. Roark, Hamburg Rubin Mullin Maxwell & Lupin PC

CLE Program: 1.0 substantive credit hour

11:45 a.m. – 12:45 p.m.

Virtual Practice/21st Century Law (CLE 310)

Many lawyers now have home offices or need to “take” their office with them when traveling. Some want to eliminate physical barriers that prevent them from partnering with a lawyer in a different geographic location. Explore the necessary steps and modern technology that enables you to run a virtual law practice. No matter where you go, everything you need can be right at your fingertips. Find out how to efficiently and ethically run your practice, no matter where you happen to be.

Moderator: Jennifer Ellis, Lowenthal & Abrams PC

Speakers:

Jeffrey A. Franklin, Prince Law Offices PC

Ellen Freedman, PBA Law Practice

Management Coordinator

CLE Program: 1.0 substantive credit hour



12:45 p.m. – 1:45 p.m.

Lunch & Section Meeting

1:45 p.m. – 7:00 p.m.

Free Time

Free time to relax and enjoy the activities and amenities the resort has to offer.

7:00 p.m. – 7:30 p.m.

Reception

Sponsored by the Pennsylvania Bar Association

7:30 p.m. – 9:00 p.m.

Dinner and Entertainment

Dinner music courtesy of Austin Law Firm LLC

Friday, July 21, 2017

7:30 a.m. – 8:30 a.m. **Continental Breakfast**

8:30 a.m. – 9:30 a.m.

Commonwealth Court: Significant Decisions and Practice Tips (CLE 311)

This session focuses on the uniqueness of the Commonwealth Court and provides an overview of cases that tend to involve small practitioners: zoning, Right-to-Know Law, civil forfeiture, public employee grievance arbitrations and charter school licensing disputes.

Speakers:

President Judge Mary Hannah Leavitt, Commonwealth Court of PA

Michael F. Krimmel, Chief Clerk, Commonwealth Court of PA

CLE Program: 1.0 substantive credit hour

8:30 a.m. – 9:30 a.m.

New Administration, New Paradigm: Representing Employers, Institutions and Municipalities in Immigration Matters in the New Era (CLE 312)

The Trump Administration has instituted a barrage of new policies, changing the tenor and composition of U.S. immigration laws.

This panel will discuss the following:

- New policies and laws impacting employers, including those in the computer, research and medical areas;
- Stepped up enforcement actions and interagency communication between USCIS (FDNS), DOL, ICE and the EEOC;
- The employer as the “policing force” for I-9s and E-Verify;
- Enforcement of federal immigration policies by the states and municipalities, especially the effect on state government and municipalities with respect to executive orders on “sanctuary cities” and the shift in law enforcement.
- Recent changes via Executive Orders and policy memorandum, and how they are creating a paradigm shift in

the manner in which employers hire foreign workers, who they hire, and the overall impact on the employer.

Speakers:

Wendy Castor Hess, Landau Hess Simon Choi

Jaqueline B. Martinez, JBM Legal LLC

CLE Program: 1.0 substantive credit hour

9:30 a.m. – 9:45 a.m.

Break

9:45 a.m. – 10:45 a.m.

Kids in Court: Difficult Issues in Juvenile Dependency and Delinquency (CLE 313)

This session will discuss life without parole, police in schools, guardians' ad litem, dual cases, representation quandaries, neuroscience and miscellaneous hot topics.

Speakers:

Justice David N. Wecht, Supreme Court of PA

Justice Sallie Updyke Mundy, Supreme Court of PA

CLE Program: 1.0 substantive credit hour

10:45 a.m. – 11:00 a.m.

Break

11:00 a.m. – 12:00 p.m.

Tips and Traps in Federal Practice (CLE 314)

Filled with helpful pointers for solo and small practitioners, this session will cover various litigation and appellate tips and traps in federal practice.

Speaker: Judge D. Michael Fisher, U.S. Court of Appeals for the Third Circuit

CLE Program: 1.0 substantive credit hour

11:00 a.m. – 12:00 p.m.

A Career With No Complaints (CLE 315)

The PBA Professional Liability Committee presents "A Career With No Complaints." What do you do at the end of your career? What do you do at the end of a colleague's career? What do you do when you're transitioning to a new career? All those clients. All those files. All those records.

Who will take care of it all when you move on? There can still be liability after our practices are closed and our careers have

reached an end. What can we do now to prepare and avoid the unpleasantness of a claim? How can we wind down ethically and avoid the pitfalls? Plan ahead. Those who attend this program will be entitled to receive a discount on their PBA-endorsed malpractice insurance with CNA.

Speakers:

Amy J. Coco, Weinheimer Haber & Coco PC
Jay N. Silberblatt, Silberblatt Mermelstein

CLE Program: 1.0 ethics credit hour

11:00 a.m. – 12:00 p.m.

Health Insurance Update for the Solo and Small Firm Practitioner (CLE 316)

This program provides guidance on different insurance options for you and your clients and explains when one becomes Medicare eligible. The team of experts from My Benefit Advisor will have answers to your health insurance questions.

Speakers:

Shelly Bloom, Director of Legislative Awareness and Training, My Benefit Advisor
Jennifer Roth, Account Executive, Medicare, USI Affinity

Brian McLaughlin, Market Leader, My Benefit Advisor, USI Affinity

CLE Program: 1.0 substantive credit hour



12:00 p.m. – 1:00 p.m.

Lunch

1:00 p.m. – 2:00 p.m.

Disaster Recovery (CLE 317)

Disaster can strike at any time. Floods, fires, robberies, hackers — each of these can lead to loss of technology, as well as client and other critical data. With modern technology, there is no reason that lawyers cannot preserve data and be up and running quickly if something happens. Join us and discover what you need to know to keep your down

time to a minimum and your hours up.
Speaker: Ellen Freedman, PBA Law Practice
Management Coordinator
CLE Program: 1.0 substantive credit hour

1:00 p.m. – 2:00 p.m.
Keeping Up With Casemaker (CLE 318)
Casemaker is a comprehensive, online legal research tool providing case law and statutes for all 50 states and the federal library, as well as other content. This informative program will provide an overview on how to use the Casemaker library to your best advantage. Topics covered include: search tips, research techniques, saving results, annotating and organizing results into folders. Step-by-step demonstrations of Casemaker's latest features will assist lawyers in using the library most effectively, whether you are new to Casemaker or have used it in the past.
Speaker: Rebecca Skeeles, Client Services Consultant, Casemaker
CLE Program: 1.0 substantive credit hour



1:00 p.m. – 2:00 p.m.
The Pennsylvania Disciplinary Process (CLE 319)
This session provides an overview of the disciplinary process in Pennsylvania, its development, structure, proceedings and case law.
Speaker: David E. Schwager, Chair, Disciplinary Board of the Supreme Court of PA
CLE Program: 1.0 ethics credit hour

2:00 p.m. – 2:15 p.m. **Break**

Photography Disclaimer
The PBA takes photographs and videos of programs for later use. By being present during PBA activities, you consent to use of your appearance or likeness by the PBA and its licensees, designees or assignees in all media, worldwide, in perpetuity. Questions or concerns should be directed to the PBA Communications Department at 800-932-0311 or at communications@pabar.org.

2:15 p.m. – 3:15 p.m.
An Overflight of Federal and State Drone Law (CLE 320)
By now everyone has seen them buzzing through the air. Unmanned Aircraft Systems (UAS), also known as “drones,” have become increasingly popular and useful among both recreational and commercial users. Not surprisingly, along with the increased use of technology have come increased legal concerns. While the FAA implements new rules regarding UAS, some state and local governments have also pursued their own legislative action. This session will explore some of these issues, including

- Overview of UAS technology
- Current FAA regulation of UAS
- State and local regulation of UAS
- Unique legal issues arising from these regulations



Speakers:
Justine M. Kasznica, Baer Crossey McDemus LLC
Devin A. Winklosky, Jones Day
CLE Program: 1.0 substantive credit hour

**Speakers current at time of printing*

ONE-ON-ONE CONSULTATIONS
Conference attendees may reserve one-on-one consultations during the event. Ellen Freedman, PBA Law Practice Management Coordinator, specializes in strategic planning, human resources, marketing and client development, financial management and profitability enhancement, compensation, technology and more. Registrants may reserve one consultation during check-in at the PBA registration desk on site. Consultation reservations are on a first-come basis and are 15 minutes in length.

Pennsylvania Bar Association Solo and Small Firm Section Annual Conference

Omni Bedford Springs Resort • Bedford, PA • July 19 - 21, 2017

REGISTRATION FORM

Name _____ Nickname for badge _____

Address _____

Supreme Court ID number _____ Phone _____ FAX _____ Email _____

Name (and preferred nickname for badge) of spouse/guest, if attending events: _____

Child(ren)'s name(s) and age(s), if attending events: _____

Please check here if you, your child or spouse/guest require special services, including any special dietary needs. *Please attach a written description of your needs and the name of the individual.*

Please check here if you are a first-time attendee.

REGISTRATION FEE (please check one):

Registration fee includes 11 hours of CLE credit, URL link to download course materials, refreshment breaks and planned meal functions.

PBA Section Member \$375

Amount Due _____

PBA Non-Section Member \$450

PBA Non-Section Member Joining the Section Today \$410

(\$35 of this fee will pay for section membership for the remainder of the year)

Non-PBA Member \$550

CLE PROGRAMS: (Included in registration fee. Please check preference. Choice is used for planning purposes only and is non-binding.)

Wednesday, July 19:

3:30 p.m. – 4:30 p.m. Client Intake and Satisfaction (CLE 301)

4:45 p.m. – 5:45 p.m. Hot Tech Tips (CLE 302)

Thursday, July 20:

8:00 a.m. – 9:00 a.m. Hot Tips (CLE 303)

9:15 a.m. – 10:15 a.m. Appellate Advocacy (CLE 304)

10:30 a.m. – 11:30 a.m. **WORKSHOPS (choose one):**

Cybersecurity (CLE 305)

Child Custody in Today's Family (CLE 306)

Title 15 (CLE 307)

11:45 a.m. – 12:45 p.m. **WORKSHOPS (choose one):**

Quality of Life (CLE 308)

Medical Marijuana in the Legal Industry: The Key Issues for Solo Practitioners and Small Firms (CLE 309)

Virtual Practice/21st Century Law (CLE 310)

Friday, July 21:

- 8:30 a.m. – 9:30 a.m. **WORKSHOPS (choose one):**
 Commonwealth Court: Significant Decisions and Practice Tips (CLE 311)
 New Administration, New Paradigm: Representing Employers, Institutions, Municipalities in Immigration Matters (CLE 312)
- 9:45 a.m. – 10:45 a.m. Kids in Court: Difficult Issues in Juvenile Dependency and Delinquency (CLE 313)
- 11:00 a.m. – 12:00 p.m. **WORKSHOPS (choose one):**
 Tips and Traps in Federal Practice (CLE 314)
 A Career With No Complaints (CLE 315)
 Health Insurance Update for the Solo and Small Firm Practitioner (CLE 316)
- 1:00 p.m. – 2:00 p.m. **WORKSHOPS (choose one):**
 Disaster Recovery (CLE 317)
 Keeping Up with Casemaker (CLE 318)
 The Pennsylvania Disciplinary Process (CLE 319)
- 2:15 p.m. – 3:15 p.m. An Overflight of Federal and State Drone Law (CLE 320)

MEAL FUNCTIONS:

Your registration fee includes refreshment breaks and meal functions. For planning purposes, please indicate the meal functions you will be attending:

- Wednesday Reception Thursday Continental Breakfast Thursday Lunch Thursday Dinner
 Friday Continental Breakfast Friday Lunch

Meal function tickets for guests:

This fee includes attendance to Wednesday's reception, Thursday's lunch and dinner and Friday's lunch.

Spouse/guest (13 years old and older) \$200 per person # of tickets _____ X \$200 **Amount Due** _____
Children (12 years old and younger) \$125 per person # of tickets _____ X \$115 **Amount Due** _____

TOTAL AMOUNT DUE _____

METHOD OF PAYMENT:

A check payable to PBA is enclosed. Or, charge my: MasterCard Visa AMEX Discover **Authorized Amount \$** _____
Credit Card # _____ **Exp. Date** _____
Signature _____ **Billing Address** _____

***Cancellation policy:** Registration deadline is July 12, 2017. After that date, all registrations will be accepted on a space-available basis. Cancellations must be received no later than July 14, 2017. Upon receipt of a written cancellation request, a refund will be issued minus a \$50 administrative fee. No refunds will be issued after July 17, 2017.*

RETURN COMPLETED REGISTRATION FORM AND PAYMENT BY July 12, 2017, TO:

PBA Meetings Department, P.O. Box 186, Harrisburg, PA 17108

Or fax credit card registration to 717-213-2507.

For more information, contact Audrey Perez at 1-800-932-0311, ext. 2234, or audrey.perez@pabar.org

Registrations will not be processed without appropriate payments included.



Pennsylvania Bar Association
100 South St., PO Box 186
Harrisburg, Pa. 17108

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