Pennsylvania Bar Association
Solo & Small Firm Section Conference

July 31-Aug. 2, 2019
Omni Bedford Springs Resort

#PBAsolo19

Discover Bedford Springs
Nested between the mountains of Pennsylvania’s scenic Cumberland Valley, the Omni Bedford Springs Resort once again warmly welcomes the PBA Solo and Small Firm Section Annual Conference attendees. This must-attend event for solo and small firm attorneys features tips to build your practice, insights from esteemed members of the judiciary, and sessions to build your knowledge in criminal law, adoption, guardianships, marijuana law, cybersecurity, immigration, exit planning and much more. Be sure to reserve time to meet with Law Practice Management Coordinator Ellen Freedman, who will schedule a one-on-one consulting session with you during the conference.

Just 90 minutes from Pittsburgh and Harrisburg and three hours from Philadelphia, the beautiful Omni Bedford Springs Resort offers luxurious accommodations in a picturesque setting that boasts historic significance. The resort offers unrivaled amenities, stunning 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 to network with fellow section members and conference attendees.

Eleven CLE credits, including four ethics credit sessions, are included in the registration fee. For those desiring 12 credits to complete your annual CLE needs, an optional one credit video will be offered Thursday afternoon for an additional fee. See details on page 7 of the brochure and be sure to register separately for this option.

You won’t want to miss Thursday night’s dinner as Joe Curcillo — The MindShark entertains us with his exceptional brand of humor and “mind-reading” fun. Joe has performed for over 40 years in all types of venues from Vegas casinos to New York City corporate offices to cheap motels in Des Moines. He combines his former career as a “mind-reading” trial lawyer with his “charming sense of humor.” Well, at least, that is what his mother calls it. (Nope, law school didn’t take away his sense of humor!)

**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 downloading, viewing and printing of CLE materials. The materials are not available for separate purchase.

**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.
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 https://www.omnihotels.com/hotels/bedford-springs/meetings/pa-bar-association-solo-and-small-firm-conference. Identify yourself as a participant in the Pennsylvania Bar Association Solo & Small Firm Section Conference. Deluxe room rates are $214 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 4:00 p.m. and check out time is 11:00 a.m. The deadline to make guest room reservations is June 28, 2019.

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. Spa treatments are inspired by the resort’s eight mineral springs first used by the local Native Americans for their healing properties. 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 advance spa reservations, please call 814-624-5633.

GOLF
The Omni Bedford Springs Golf Resort offers an outstanding golf course designed by two of the most celebrated course architects in history, A.W. Tillinghast and Donald Ross. Attendees of the Solo and Small Firm Section Conference can reserve discounted golf tee times at the group rate of $149 per person. Please call the golf pro shop directly to reserve your tee time at 814-624-5637 and reference the PA Bar Association group rate.

ADDITIONAL ONSITE 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 31, 2019

2:30 p.m. – 7:00 p.m.  Registration

3:30 p.m. – 4:30 p.m.
How Emotional Intelligence Links to Ethical Compliance and Success (CLE 301)
What is emotional intelligence? What does it have to do with ethical compliance and success in the practice of law? This seminar will reveal how emotional intelligence impacts an attorney’s compliance with the ethics rules. This session will examine the evidence of a relationship between emotional intelligence and success for both attorneys and judges. These “soft skill” concepts will provide a great deal of food for introspective thought about personal improvement.
_Speaker:_ Ellen Freedman, PBA law practice management coordinator

CLE Program: 1.0 ethics credit hour

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 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.
_Moderator:_ Jennifer L. Ellis, Jennifer Ellis, JD, LLC
_Speakers:_ Andrea Cannavina, LegalTypist Inc.
Ellen Freedman, PBA law practice management coordinator
Kim L. Lengert, Lengert Law Firm
James P. Miller, Attorney at Law

CLE Program: 1.0 substantive hour credit

9:00 a.m. – 9:15 a.m.  Break

9:15 a.m. – 10:15 a.m.
The Current State of Firearms Law in Pennsylvania (CLE 304)
Many residents of Pennsylvania own firearms. As a result, it is critical for all attorneys to have an understanding of the current licensing and regulatory scheme. In addition, discover the new law allowing lawyers to hold weapons for their clients and recognize how to limit your own risks and liability.
_Speaker:_ Jonathan S. Goldstein, Goldstein Law Partners

CLE Program: 1.0 substantive credit hour

9:15 a.m. – 10:15 a.m.
How Lawyers Create the Life They Want (CLE 305)
Too many lawyers have it backward, selling their soul to the firm, racking up hours without the results they want because

Thursday, Aug. 1, 2019

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)
Rapid-fire tips bring you the latest developments in the following areas of law: Employment, Family, Criminal, Bankruptcy, Land Use and Tax.
_Moderator:_ Sara A. Austin, Austin Law Firm LLC
_Speakers:_ Rita G. Alexyn, Rita G. Alexyn Law Office
Harold M. Goldner, Kraut Harris PC
Anne N. John, PBA President, John & John
Jay N. Silberblatt, Silberblatt Mermelstein
Suzanne Smith, Marshall and Smith PC

CLE Program: 1.0 substantive credit hour
they blindly threw themselves in without thinking through what they wanted to create. You own the firm; the goal is to not let the firm own you. This session will show you how to build or restructure your law firm to serve and support the life you love — not the other way around. Happy lawyers make more money, have a bigger impact, find greater fulfillment in their careers, and enjoy better health and more joy.  
*Speaker: Wendy Witt, Million Dollar Attorney®*

**CLE Program: 1.0 substantive credit hour**

**9:15 a.m. – 10:15 a.m.**  
**I Will Never be Sued and Other Lies Lawyers Tell Themselves (CLE 306)**  
Whether you’ve been practicing for 45 years or five years, you feel invincible because to succeed you need to be confident. A successful lawyer is so good, so experienced, so terrific, so busy, so well-liked, so knowledgeable, so above-it-all, that nothing bad could ever happen, right? You won’t ever get sued, right? Those feelings of invincibility can be a problem. We’ve got 13 lawyers that think they know it all and there’s something to learn from each of them. Let’s discuss 13 (or maybe more) ways things can go wrong and ways to help prevent them from happening. **Those who attend this program will be entitled to receive a discount on their PBA-endorsed malpractice insurance with CNA.**  
*Speakers: Jay N. Silberblatt, Silberblatt Mermelstein  
Amy J. Coco, Weinheimer Haber & Coco PC*  
**CLE Program: 1.0 ethics credit hour**

**10:15 a.m. – 10:30 a.m.**  
**Break**

**10:30 a.m. – 11:30 a.m.**  
**Private Process Servers and Private Detectives in Pennsylvania (CLE 307)**  
Pennsylvania has numerous rules about proper service. Sometimes those rules are in conflict and it can be difficult to be certain you are following the proper requirements. During this session, a private detective/process server and an ethics attorney will explore what you need to know about process service. They will also discuss the tools you can use to find missing people on your own, and how to know when it is time to bring in professional help. You will learn when, and how, you can work with a private detective, and how private detectives and process servers can help you with your cases.  
*Speakers: Jennifer L. Ellis, Jennifer Ellis, JD, LLC  
Michele Harris, Harris Investigations LLC*  
**CLE Program: 1.0 substantive credit hour**

**10:30 a.m. – 11:30 a.m.**  
**Resilience: How to Learn to Survive in a High Stress Practice (CLE 308)**  
Why do some people become overwhelmed by stress while practicing law and others have learned to thrive? The secret is to employ strategies of resilience. This presentation is based on the training developed by the US Army since 2008 for soldiers facing high stress positions and potentially fighting PTSD. The training includes strategies for high-conflict resolution, “right-spotting” strengths, recognizing the difference between “urgent” v. “important” tasks and budgeting for success. This presentation will also include information from the Pennsylvania Lawyers Concerned for Lawyers Program.  
*Speaker: Claude E. Ducloux, Law Offices of Claude E. Ducloux*  
**CLE Program: 1.0 ethics credit hour**

**10:30 a.m. – 11:30 a.m.**  
**Opening the Door: Starting a New Practice (CLE 309)**  
You have what it takes! Many attorneys are reluctant to hang out their own shingle
because it appears an overwhelming undertaking. This quick start course provides a roadmap for the steps leading up to opening a law practice. You will learn how to build a solid foundation upon which you can prosper, provide efficient client service, develop methods to maintain quality control and ethical compliance, develop your brand, and open the doors. Attorneys with established practices will find valuable nuggets that can be applied to improve operations and results.

_Speakers:_ Ellen Freedman, PBA law practice management coordinator
Wendy Witt, Million Dollar Attorney®

**CLE Program: 1.0 substantive credit hour**

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11:30 a.m. – 11:45 a.m.  Break

11:45 a.m. – 12:45 p.m.
Criminal Law Update for Dabblers (CLE 310)
During this session, we will explore several criminal law topics that dabblers may see come across their desks, such as expungements, DUI and interlock, licenses suspension, SORNA/sex offender registration, and a few other brief topics of interest to many solo and small firm lawyers.
_Speakers:_ Suzanne S. Smith, Marshall & Smith PC
Megan E. Will, The Law Office of Megan E. Will

**CLE Program: 1.0 substantive credit hour**

11:45 a.m. – 12:45 p.m.
“Simple” Adoption (CLE 311)
Adopting a child in Pennsylvania can be a daunting task. We will simplify the practice, pitfalls, and procedures for you! Enjoy this interactive program, where you, the audience, create the facts, complicate the issues and set the stage for us, the presenters. Watch and learn as we unravel the problems you create. We will identify issues, help you advise clients and show you how to bring your adoption case to a successful conclusion. This is an ideal session for attorneys in every stage of adoption practice, including those who are just beginning, have not yet mastered all aspects of that subject or are more seasoned in their practice.
_Speakers:_ Mary E. Schellhammer, Attorney at Law
Craig B. Bluestein, Law Offices of Craig B. Bluestein

**CLE Program: 1.0 substantive credit hour**

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11:45 a.m. – 12:45 p.m.
Guardianships (CLE 312)
Big changes are coming to the world of guardianships! Chapter XIV of the Pennsylvania Orphans’ Court Rules was amended in June 2018, with many of the new rules becoming effective in June 2019. We will review these changes in detail, which include a new online filing system for annual reports, and specific requirements for guardianship petitions and orders.
_Speaker:_ Lauren Cascino Presser, The Law Firm of Timothy M. Ayres LLC

**CLE Program: 1.0 substantive credit hour**

12:45 p.m. – 1:45 p.m.  Lunch & Section Meeting
Free time to relax and enjoy the activities and amenities the resort has to offer.

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New this year:

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Optional additional CLE session
You asked, we listened! Seeking to receive all 12 CLE credits while attending the conference? Join us at 2:00 p.m. for this one-hour, 1.0 credit video. Be sure to register separately to attend via the registration portion of the brochure. Additional fee of $59 will be added to your total registration cost.

2:00 p.m. – 3:00 p.m.
Work Smarter, Not Harder (CLE 324)
Explore new, free and copyright-free resources you can access at the click of a mouse. Villanova University Charles Widger School of Law Legal Research Instructor Lori Corso will show you where and how to access online resources that can add a boost to your case work and save you time (and money!). Items covered include:

- General technology resources and other information critical to your practice
- Keeping up with new technology and tools by joining specific listservs and subscribing to preferred content
- Free presentation software for use in trial or elsewhere and how to locate copyright-free images and videos for use in these presentations
- How free and low-cost document management software can help you win your case
- Locating reliable law practice software reviews and finding the best technology to fit your practice needs

7:00 p.m. – 7:30 p.m. Reception
7:30 p.m. – 9:00 p.m. Dinner and Entertainment
Joe Curcillo — The MindShark, presents “THINK LOUD!: I’m Listening.”

Friday, Aug. 2, 2019

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

8:30 a.m. – 9:30 a.m.
Marijuana Law (CLE 313)
A lot has changed in the three years since Pennsylvania passed the Medical Marijuana Act. More than a 100,000 patients have been registered and more than 1.5 million products have been dispensed. This session will provide an update on Pennsylvania’s marijuana and hemp industries and highlight the numerous ways solo practitioners and small firms may encounter cannabis-related issues in their practice. No free samples.

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

CLE Program: 1.0 substantive credit hour

8:30 a.m. – 9:30 a.m.
The Impaired Lawyer – A Call for Action (CLE 314)
Recent studies have shown that there has been a dramatic increase in impairment due to alcoholism, addiction and mental health disorders among members of the legal profession. The statistics are compelling and clearly indicate that one out of three attorneys will likely have a need for substance use or mental health services at some point in their careers. Our speaker will discuss issues including:

- Early warning signs of impairment
- Approaching an impaired individual
- Services Lawyers Concerned for Lawyers provides to lawyers, judges, their family members and law students
• What barriers exist to preventing lawyers and judges from seeking the help they need
• How education helps break the stigma and fear associated with addiction and mental illness

Special emphasis will be placed on the danger of enabling behavior and how it can actually prevent treatment.  
*Speaker:* Brian E. Quinn, The Law Offices of Brian E. Quinn  
*CLE Program:* 1.0 ethics credit hour

8:30 a.m. – 9:30 a.m.  
**Securely Storing and Accessing Your Client Data in the Cloud, Freeing Yourself from the Confines of the File Cabinet and the Office (CLE 315)**  
This session will discuss how to use the cloud to securely store and access client data. Topics to be address will include the benefits of using the cloud to store client data; how to choose a cloud storage provider; complying with ethics rules; and how secure mobile access can allow lawyers to practice from wherever they have internet access.  
*Speaker:* James P. Miller, Attorney at Law  
*CLE Program:* 1.0 substantive credit hour

9:30 a.m. – 9:45 a.m.  
**Break**

9:45 a.m. – 10:45 a.m.  
**Calculating Income in a Support Order (CLE 316)**  
Thanks to the Tax Cuts & Jobs Act of 2017, calculating income available for support has become a challenge except in the most basic of situations. This session will address some of those complexities and how to address them, and will work through a couple of case studies.  
*Speakers:* Michael J. Molder, AILA Limited  
Mary E. Schellhammer, Attorney at Law  
*CLE Program:* 1.0 substantive credit hour

9:45 a.m. – 10:45 a.m.  
**Emojis, Likes & Chats Oh My: Modern Communication & Litigation (CLE 317)**  
These days many of our clients communicate through abbreviated terms, images and fast-paced chat applications. The law has struggled to keep up with discovery and admissibility of these types of communications. During this session, we will explore some of the issues that can arise during litigation when it comes to social media, emojis and other common forms of e-communications.  
*Speakers:* Sara A. Austin, Austin Law Firm LLC  
Jennifer L. Ellis, Jennifer Ellis, JD, LLC  
*CLE Program:* 1.0 substantive credit hour

9:45 a.m. – 10:45 a.m.  
**Best Practices to Keep Going: Keeping Your Law Firm Healthy (CLE 318)**  
Strategic planning, management oversight and marketing don’t end when the firm opens its doors, but this is easier to say than achieve when deadlines and client expectations loom large. Law firms are living, breathing entities that, in order to continue to prosper, require nurturing and application of best practices. This course covers the many key areas to monitor and the required actions to keep you on track.  
*Speakers:* Ellen Freedman, PBA law practice
management coordinator
Wendy Witt, Million Dollar Attorney®

CLE Program: 1.0 substantive credit hour

10:45 a.m. – 11:00 a.m. Break

11:00 a.m. – 12:00 p.m.

DIY Marketing: 33 Things to Either Stop Or Start Doing By Yourself (CLE 319)
This session guides lawyers through a series of easily implementable advertising tactics you can handle on your own. This session will cover marketing from every angle — from defensive branded AdWords campaigns to improved intakes through mystery shopping, to the affordable hardware needed to record and produce high-end video content. 

Speaker: Conrad Saam, Mockingbird Marketing

CLE Program: 1.0 substantive credit hour

11:00 a.m. – 12:00 p.m.

Pennsylvania’s Intermediate Appellate Courts: The Inside View (CLE 320)
Superior Court Judge Judith Olson and Commonwealth Court President Judge Mary Hannah Leavitt will explain the differences in how the two courts operate, what they like and dislike in briefs and oral arguments, and the decision process. Moderator Donald J. Martin will add a practitioner’s perspective. 

Moderator: Donald J. Martin, Attorney at Law

Speakers:
Hon. Mary Hannah Leavitt, President Judge, Commonwealth Court of Pennsylvania
Hon. Judith Ference Olson, Superior Court of Pennsylvania

CLE Program: 1.0 substantive credit hour

12:00 p.m. – 1:00 p.m. Lunch

1:00 p.m. – 2:00 p.m.

Immigration Toolbox for Solo Practitioners (CLE 321)
This session will cover the all ambiguous “immigration status” and how it may dictate your representation. Speakers will address common issues faced by family, criminal and business attorneys. The toolbox materials will provide easy-to-follow charts and outlines to quickly reference immigration issues such as: 

• How “immigration status” impacts clients.

• What happens when a client is charged with shoplifting or insurance fraud?

• Determining custody if one parent is in removal proceedings.

• Determining child support when parents have no Social Security or work authorization

• Settlements when status is expiring

• What does Asylee mean?

• Is it possible to start a business without papers?

The speaker will discuss the impact of increased migration to Pennsylvania by documented and undocumented immigrants and how it likely will impact most solo practices. The immigrant population is growing quickly in Pennsylvania. So is the need for representation. 

Speaker: Jacqueline B. Martinez, JBM Legal LLC

CLE Program: 1.0 substantive credit hour
business preparing to exit. During this program, you will learn:
• What drives business value?
• What is succession planning?
• Why is succession planning important?
• Best practices for succession planning
• How a strong succession plan is critical for business valuation and a successful exit

Speaker: Justin Brahim, BPU Investment Management Inc.

CLE Program: 1.0 substantive credit hour

2:00 p.m. – 2:15 p.m. Break

2:15 p.m. – 3:15 p.m.
What the $@** is Happening to the First Amendment (CLE 323)
Join us as we remember the 1968 Olympics when gold and bronze medalists Tommie Smith and John Carlos raised the Black Panther fist during the National Anthem. We’ll compare the law during their protest to Colin Kaepernick’s message when he knelt during the National Anthem. In an interview style presentation, we’ll discuss how the area of free speech has stayed the same and how it’s evolved dramatically through the years — for the times they are a’changin.’ This session will help practitioners when clients say, “My kid wants to kneel for the National Anthem at his high school football game — can he do that?” or “I want to protest at Walmart about unfair employment practices — can I do that?”

Speakers: Hon. Keith A. Pesto, Magistrate Judge for the U.S. District Court for the Western District of Pennsylvania Arlene Ann Dudeck, Sahlaney, Dudeck and Hochfeld Law Office

CLE Program: 1.0 substantive credit hour

*Speakers current at time of printing

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PBA YLD Member Discount
PBA YLD members who are attending the conference for the first time save $100 on registration fees! Be sure to check the appropriate box on the registration portion of the brochure.

PLATINUM SPONSORS

![USI Affinity](image)
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<th>Time</th>
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**MEAL FUNCTIONS:**

- Your registration fee includes refreshment breaks and planned 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 and older) ... $225 per person  □ # of tickets  □ $...
  - □ Children (12 and younger) ... $125 per person  □ # of tickets  □ $...

**TOTAL AMOUNT DUE $_________**

**REGISTRATION FEE (please check one):**

- Registration fee includes 11.0 hours of CLE credit, a link to download course materials, refreshment breaks and planned meal functions.

  - □ PBA Section Member ... $385
  - □ PBA Non-Section Member ... $465
  - □ PBA Non-Section Member Joining the Section Today ... $445
  - ($35 of this fee will pay for section membership for the remainder of the year)

**CLE PROGRAMS:**

- (Included in registration fee. Please check preference. Choice is used for planning purposes only and is nonbinding.)

**Wednesday, July 31:**

- 3:30 p.m. – 4:30 p.m. □ Hot Tips (CLE 303)
- 4:45 p.m. – 5:45 p.m. □ How Emotional Intelligence Links to Ethical Compliance and Success (CLE 301)

**Thursday, August 1:**

- 8:00 a.m. – 9:00 a.m. □ Hot Tips (CLE 303)
- 9:15 a.m. – 10:15 a.m. □ WORKSHOPS (choose one):
  - □ The Current State of Firearms in PA (CLE 304)
  - □ How Lawyers Create the Life They Want (CLE 305)
  - □ I Will Never Be Sued and Other Lies (CLE 306)
- 10:30 a.m. – 11:30 a.m. □ WORKSHOPS (choose one):
  - □ Private Process Servers/Private Detectives (CLE 307)
  - □ How to Survive in a High Stress Practice (CLE 308)
  - □ Opening the Door: Starting a New Practice (CLE 309)
- 11:45 a.m. – 12:45 p.m. □ WORKSHOPS (choose one):
  - □ Criminal Law Update for Dabblers (CLE 310)
  - □ “Simple” Adoption (CLE 311)
  - □ Guardianships (CLE 312)

**Optional additional CLE session $59:**

- □ Work Smarter, Not Harder (CLE 324)

**Optional additional CLE session $59:**

- □ Marijuana Law (CLE 313)
- □ The Impaired Lawyer – A Call for Action (CLE 314)
- □ Securely Storing/Accessing Your Client Data in the Cloud (CLE 315)

**METHOD OF PAYMENT:**

- □ A check payable to PBA is enclosed.
- Or, charge my: □ MasterCard □ Visa □ AMEX □ Discover

**CANCELLATION POLICY:**

- Registration deadline is July 19, 2019. After that date, all registrations will be accepted on a space-available basis. Cancellations must be received no later than July 24, 2019. Upon receipt of a written cancellation request, a refund will be issued minus a $50 administrative fee. No refunds will be issued after July 24, 2019.
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Solo & Small Firm Section
Conference
July 31-Aug. 2, 2019
Omni Bedford Springs Resort
Bedford, Pa.

#PBA solo19