

Get ready to recharge your professional batteries and  
revitalize your sole and small firm practice

# 2nd Annual Solo and Small Firm Conference and Expo

**Chaired by:** **Anthony B. Carfagnini**, Barrister and Solicitor (Thunder Bay)  
**Carole Curtis**, Barrister and Solicitor

**Technology Chair:** **Daniel E. Pinnington**, Director, PracticePRO  
Lawyers' Professional Indemnity Company (LAWPRO)

**Dates:** **Treasurer's Dinner**  
**Osgoode Hall Dining Room**  
**March 1, 2007** 6:00 p.m. – 9:00 p.m.

**Conference**  
**Donald Lamont Learning Centre**  
**March 2, 2007** 9:00 a.m. – 4:30 p.m.  
**(Reception: 4:30 p.m. – 6:00 p.m.)**

**Location:** The Law Society of Upper Canada  
130 Queen Street West, Toronto



Sole practitioners and lawyers in small firms will not want to miss this unique conference now in its second year. Technology topics were “standing room only” at the last Conference. This year, we will focus exclusively on technology and law practice management issues. Our faculty will address the central challenges faced by sole and small firm lawyers in the areas of client development, staffing, dealing with e-mail, technology and security, retirement planning, and much more.

You will have an opportunity to improve your skills, update your knowledge, sample innovative legal support products in our Exhibitors' Hall, and connect with sole and small firm lawyers from across the province.

**NEW** — Law Society Treasurer Gavin MacKenzie invites conference delegates to attend a dinner on Thursday, March 1, 2007. Registration for the Treasurer's Dinner is required, as space is limited.

*This program, jointly presented by the Law Society of Upper Canada and the Ontario Bar Association, is offered at a reduced rate to encourage participation from lawyers across Ontario. A continental breakfast, lunch and afternoon reception on March 2 are included.*

**A joint presentation with:**



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Ontario Bar Association  
Association du Barreau de l'Ontario



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du Haut-Canada

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9:00 a.m. – 9:10 a.m.

WELCOME AND OPENING REMARKS

9:10 a.m. – 10:10 a.m.

PLENARY SESSION

**60 Solo and Small Firm Tips in 60 Minutes**

Back by popular demand! In this fast-paced session our experienced panel of tipsters will share their best practical ideas for getting things done better, faster and cheaper. There is something for everyone in this session, including tips about managing your practice, getting the most from your technology, honing your research skills, maximizing your marketing dollars, planning for your retirement, and more.

**David J. Bilinsky**

Practice Management Advisor & Staff Lawyer, *The Law Society of British Columbia*

**Carole Curtis**

Barrister and Solicitor

**Daniel E. Pinnington**

Director, practicePRO, *Lawyers' Professional Development Company (LAWPRO)*

10:10 a.m. – 10:40 a.m.

Refreshment & Networking Break in Exhibitors' Hall

10:40 a.m. – 11:25 a.m.

Concurrent Breakout Sessions

**LAW PRACTICE MANAGEMENT TRACK**

**Financial Planning and PCLaw™**

Technology has made keeping track of time, billing for services and expenses, and understanding exactly where the firm is financially much easier and faster. This session will help you better understand and manage your firm's finances, and how programs like PC Law™ can tell you what you really need to know. You will also hear tips on how to avoid the common bookkeeping and financial management traps that solos and small firms fall into.

**David J. Bilinsky**

Practice Management Advisor & Staff Lawyer  
*The Law Society of British Columbia*

**Anthony Gonsalves, CMA**

Coordinator, Spot Audit Program  
*The Law Society of Upper Canada*

**TECHNOLOGY TRACK**

**The Elusive Paperless Office: How You Can Get There From Here**

Have you ever lost a document, scribbled file notes on an original, or experienced a gnawing fear that you're not keeping track of every paper that has passed through your hands? Going paperless liberates you from these concerns while disaster-proofing your practice and providing you with greater mobility and time savings. In this session, you will be introduced to the basics of reducing paper in your practice. The discussion will include using scanners, OCR and Adobe® Acrobat®.

**Peter T. Henderson**

*Kramer Henderson LLP*

**John Salloum**

*Heenan Blaikie LLP*

11:25 a.m. – 12:10 p.m. Concurrent Breakout Sessions

**LAW PRACTICE MANAGEMENT TRACK**  
Client Development and Marketing

Rainmaking and marketing are a cornerstone of every successful and growing law practice, yet many lawyers struggle with marketing, and some avoid it all together. Come to this session to learn how you can make marketing a part of your day and how you can improve your clientele. We will show you how to create a marketing plan, build a presence on the Web and create a unique brand for yourself and your firm.

**Lawrence S. Pascoe**  
*Mirsky Pascoe (Ottawa)*

**Gisèle F. White, B.Sc., M.Sc.**  
Information Manager  
*Carters Professional Corporation (Orangeville)*

**TECHNOLOGY TRACK**  
PDF 101

Lawyers and law office see PDF files on a daily basis — in government forms, court filings, litigation documents and Internet downloads, to name a few. Come to this session to learn the basics of working with PDF files. You'll learn about creating and manipulating PDF documents and creating e-briefs. You will also learn how PDFs can be used to collaborate with others and prevent breaches of confidentiality.

**Stephen Bird, Staff Lawyer**  
*Lanark, Leeds & Grenville Legal Clinic (Perth)*

**Simon Chester**  
*Heenan Blaikie LLP*

12:10 p.m. – 1:10 p.m. Lunch Break in Exhibitors' Hall

1:10 p.m. – 1:55 p.m. Concurrent Breakout Sessions

**LAW PRACTICE MANAGEMENT TRACK**  
Mastering your Mailbox:  
E-mail and Information Management

Are you at the mercy of your inbox? Do you feel like you can't get to the important work because you spend all your time weeding through spam or trying to organize your file-related e-mail? This session will teach you how to better manage your time, harness your inbox and make e-mail the workhorse driving your practice forward that it was intended to be. Use Outlook™ and other programs to help you find what you need — when you need it — keep your e-mail organized and filter out spam!

**David J. Bilinsky**  
Practice Management Advisor & Staff Lawyer  
*The Law Society of British Columbia*

**Peter Cusimano**  
Barrister and Solicitor

**TECHNOLOGY TRACK**  
Locking the Doors AND the Windows:  
Electronic Security in the Small Firm World

What are the latest threats to your client data and IT systems? Viruses, spyware, spam, social hacking, root kits, equipment failure — these are but a few. What are the best technologies and procedures for protecting yourself from these threats? What are your ethical obligations? This session will explore and explain the various threats to the security of your client and firm data, and it will show you practical strategies and tools that will help you reduce or eliminate these threats and the damage they can cause to your firm.

**Daniel E. Pinnington**  
Director, practicePRO  
*Lawyers' Professional Development Company (LawPRO)*

1:55 p.m. – 2:40 p.m. Concurrent Breakout Sessions

**LAW PRACTICE MANAGEMENT TRACK**  
**Hiring and Keeping Good Staff**

Happy employees result in happier clients, and happy clients are good for business! In this session, you will learn the secrets of building and maintaining a satisfied and productive staff. Whether you are thinking about hiring support staff for the first time, have one assistant or employ a number of law clerks, this session will give you practical ideas and techniques to keep your office running smoothly.

**Pascale Daigneault**, *Fleck & Daigneault* (Point Edward)

**Carole Curtis**, Barrister and Solicitor

**TECHNOLOGY TRACK**  
**Computer Research: Getting the Most Bang for Your Buck**

Technology and Web skills are critical for legal research. You will learn the wonders of various tools and resources on the Web, and how to use them in your practice. You will also learn how to maximize other resources available to you at your local County and District Law Library and how to choose from among the many subscription services available to you. Take advantage of our law librarian's insider's tips on how to save valuable time and money.

**Jeanette Bosschart**  
Reference and Instructional Services Librarian  
Great Library  
*The Law Society of Upper Canada*

2:40 p.m. – 3:00 p.m. Refreshment and Networking Break in Exhibitors' Hall

3:00 p.m. – 3:45 p.m. Concurrent Breakout Sessions

**LAW PRACTICE MANAGEMENT TRACK**  
**Retirement and Succession Planning**

Whether you are just starting out, or you are thinking about winding down your practice, it's never too soon to begin planning. In fact, a failure to properly plan or prepare for an anticipated or unexpected departure from your practice could expose your clients to significant damages or prejudice, or expose your law partners or family members to financial and emotional disaster. Attend this session to learn about creative retirement strategies used by other lawyers. You will receive valuable articles, precedents, and checklists.

**Cettina Cornish**  
Counsel, Professional Development & Competence  
*The Law Society of Upper Canada*

**Michael B. Carter**, Barrister and Solicitor (Thunder Bay)

**TECHNOLOGY TRACK**  
**Working Remotely**

Electronic communication has freed lawyers from being chained to the office. Today, you can work remotely in almost any location and still have access to all the information, tools and resources you enjoy while in your office. Attend this session to learn how to make the most of working remotely, including information on the latest technology, tips for home office set-up, and the dos and don'ts for working away from the office.

**Norman Bowley**  
*Bowley Kerr Nadeau* (Ottawa)

**Continued on next page...**



3:45 p.m. – 4:30 p.m. Concurrent Breakout Sessions

**LAW PRACTICE MANAGEMENT TRACK**  
**Hi-Tech Tool-Kit: Blogging, Outsourcing and Offshoring**

Technology-savvy lawyers can make a niche for themselves by taking advantage of the latest tools and emerging trends. Our hi-tech speaker, a sole practitioner renowned for his blogging efforts, will bring you up-to-speed on what's happening in the avant-garde worlds of blogging, outsourcing and offshoring. He will explain how you can get on the "bandwagon," and why you should or should not.

**Rob Hyndman**  
*Hyndman | Law*

**TECHNOLOGY TRACK**  
**Boosting your Productivity with Microsoft Word®**

Are you using all the features in Word available to save time and reduce your workload? Efficiency is essential for maximizing profits and reducing stress and hours at the office. This session will review the basic to advanced "must know" features in Word that you didn't know that you "didn't know."

**Douglas J. Simpson**  
Barrister and Solicitor

**Neman Syed**  
BlackBerry Trainer  
Education Services  
*Research In Motion Limited*

4:30 p.m. Program Ends

4:30 p.m. – 6:00 p.m.  
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### Four ways to register:

- Online:** <http://ecom.lsuc.on.ca/cle> \*
- Phone:** 416-947-3315 or 1-800-668-7380 Ext. 3315 \*
- Fax:** 416-947-9070 \*
- Mail:** The Law Society of Upper Canada  
130 Queen St. W. 2nd Floor, Toronto, Ontario M5H 2N6

\* Credit card required

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## CLE Registration Form: 2nd Annual Solo and Small Firm Conference and Expo

Yes I would like to attend: (please indicate below)	Price
<input type="checkbox"/> <b>Treasurer's Dinner: March 1, 2007 (6:00 p.m. – 9:00 p.m.)</b> <i>(Open to conference registrants only — Registration required by February 19, 2007)</i>	Complimentary
<input type="checkbox"/> <b>Conference: March 2, 2007 (9:00 a.m. – 6:00 p.m.)</b>	\$250.00
<b>You are not registered until payment is received.</b>	<b>Plus 6% GST:</b>
	\$15.00
	<b>Total:</b>
	<b>\$265.00</b>

Cheque payable to The Law Society of Upper Canada in the amount of \$ \_\_\_\_\_

or Charge my  Mastercard  Visa  AmEx

First and Last Name on Credit Card: \_\_\_\_\_

Credit Card #: \_\_\_\_\_

Expiry Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Name of Attendee: \_\_\_\_\_

LSUC Membership #: \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

Province: \_\_\_\_\_

Postal Code: \_\_\_\_\_

Phone #: \_\_\_\_\_

Fax #: \_\_\_\_\_

E-mail: \_\_\_\_\_