

State Bar of Wisconsin PINNACLE  

**WSSFC**  
**2024** Wisconsin Solo & Small Firm Conference

October 17-19, 2024  
 Kalahari Resort  
 Wisconsin Dells

MARQUEE SPONSOR



# Conference Guide

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## SIGN IN FOR CLE CREDITS!

Please be sure to sign in at the registration table **each day** to ensure your credits are accurately recorded for the BBE.

## WIN GREAT PRIZES!

Conference attendees have various ways to enter to win thousands in prizes including:

- Amazon Echo Show 8
- Apple Watch SE (2nd Gen) [GPS 40mm] Smart Watch
- Bose QuietComfort 35 (Series II) Wireless Headphones, Noise Cancelling – Black
- Seagate Expansion 14TB External Hard Drive
- 360° Adjustable Stand Mini Projector With WiFi and Bluetooth
- Ring Alarm 14-Piece Kit – Home Security System with 30-Day Free Ring Protect Pro Subscription
- Plustek PS186 Desktop Document Scanner, with 50-pages Auto Document Feeder
- Popi Digital Business Card – Smart NFC Networking Card – Tap to Share
- 1 - 2025 AMC Registration
- 2 - \$150 PINNACLE (Books or Seminars) Gift Certificates
- 2 - Gift Certificates for Free CLE OnDemand Seminars
- 2 - Gift Certificates for Books UnBound Individual Title of Choice
- 2 - Gift Certificates for Free PINNACLE Seminar or Conference/Institute
- 1 - \$250 Target Gift Card
- 1 - \$150 Target Gift Card
- And more!



Scan this QR code for complete program descriptions, course materials, maps of the conference center, and exhibitor information or go to [wisbar.org/WSSFCmaterials](http://wisbar.org/WSSFCmaterials).

## A SPECIAL THANK YOU TO THE TEAM WHO MADE WSSFC 2024 POSSIBLE

### EXECUTIVE COMMITTEE

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Ogden Glazer + Schaefer  
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**Sarah A. Clark**

*PINNACLE Program Planner*  
State Bar of Wisconsin  
Madison

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*PINNACLE Program Planner*  
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### QUALITY OF LIFE/ETHICS TRACK

**Brian C. Anderson**

Wisconsin Lawyers Mutual  
Insurance Company (WILMIC)  
Madison

## Legal Expo

This year's Legal Expo features more than 30 businesses whose products and services are designed to help you better manage your practice.

Knowledgeable representatives are on hand to provide you with information on technology, insurance programs, expert services, practice management tools, marketing, research, financial services, and more.

Exhibitors contribute important resources and financial support to State Bar of Wisconsin PINNACLE Conferences & Institutes. Please return that support by visiting their booths.

## Win Prizes

You have several chances to win prizes:

- Stop by the individual booths to register for the many door prizes being offered directly from exhibitors.
- Have your PASSPORT TO PRIZES signed by exhibitors and drop it at the State Bar booth by 12:00 p.m. on Friday.
- Drop your business card at the Hospitality Suite on Friday.

## Thursday Evening Attendee Reception in the Legal Expo

On Thursday evening, unwind from a busy day and start making new connections while enjoying complimentary beer, wine, soda, hors d'oeuvres, and a cash bar from 4:20 p.m. – 6:00 p.m. *Sponsored by Above the Bar Marketing; Kramer, Elkins & Watt, LLC; and WILMIC.*

## EXHIBIT HALL HOURS:

THURSDAY: 12:00 p.m. – 6:00 p.m.  
FRIDAY: 7:45 a.m. – 1:45 p.m.

## SIGN IN FOR CLE CREDITS!

Please be sure to sign in at the registration table **each day** to ensure your credits are accurately recorded for the BBE.



Follow the WSSFC on X. When tweeting about or from the Conference, use hashtag #wssf

# SAVE THE DATE!



Join us next year to connect, learn and grow at the Wisconsin Solo and Small Firm Conference 2025.

## MARK YOUR CALENDARS NOW!

## General Information

### REGISTRATION

**IMPORTANT:** Sign in each day before attending any sessions.

<b>Thursday, October 17</b>	<b>8:00 a.m. – 5:00 p.m.</b>
<b>Friday, October 18</b>	<b>7:45 a.m. – 4:00 p.m.</b>
<b>Saturday, October 19</b>	<b>8:00 a.m. – 10:50 a.m.</b>

### CREDITS

WSSFC has been submitted to the Wisconsin Board of Bar Examiners (BBE) for up to 15.0 credit hours, which can be earned by attending and reporting a combination of approved sessions. Depending on your session selections, you can earn up to 15.0 credits, comprised of a combination of CLE, EPR, LPM, and/or LAU credits.

Complimentary webcast replays totaling an additional 7.5 credit hours will be offered the weeks of November 25, December 16, January 20, March 3, May 12, and June 23.

Use the schedule on pages 6-7 to track the sessions you attend and plan for webcast replays. Note that the BBE has a 6.0 credit limit per reporting period for Law Practice Management (LPM) and another 6.0 for Lawyer Awareness and Understanding (LAU) credits. If you have questions about credit, please visit the registration desk.

### NAME BADGES

Please wear your badge at all official Conference functions. It is your admission to all CLE programs, workshops, and events. In addition, your badge will help you to renew old friendships and

meet new colleagues. Name badge ribbons will help you identify State Bar speakers, Conference sponsors, and exhibitors.

Name badges adorned with a blue dot designate that you are attending the Friday Lederer Award networking lunch. If you do not have a blue dot and would like to attend the lunch, please visit the registration desk.

### PLEASE RECYCLE YOUR NAME BADGE HOLDER

Before you leave the Conference, please drop your name badge holder in one of the name badge boxes. We appreciate your efforts to help our environment.



### GUEST PACKAGES

To keep Conference tuition down for all attendees, no carryout food or beverage is permitted from the Expo Hall or continental breakfasts. While meals and breaks are for Conference attendees and presenters, food and beverage passes for guests and family members are available for purchase for \$100 each (includes all breakfasts, luncheons, breaks, opening reception, and hospitality suite). You may purchase guest passes at the registration desk.

### HOSPITALITY STATIONS

Hospitality stations are located throughout the Conference space. A complimentary breakfast will be served each day, with refreshments served during session breaks.

### LIST OF PREREGISTRANTS

Wondering if someone is here? A list of all preregistered attendees is available at the registration booth.



At 3sixty Consulting Group, we are driven by a passion for creating meaningful change within organizations, focusing on achieving the goals entrusted to us. The gratitude and trust of our clients are the true measure of our success, and we are fully committed to delivering impactful, lasting results. We serve law firms. More specifically, we serve small law firms exclusively. We do this by providing fractional c-suite services, financial and operational guidance, accounting, bookkeeping, and a host

of services specifically to address the needs of our clients. Our founder, Chris Echols, brings over two decades of executive leadership experience, including roles as CEO, COO, and CFO for large national firms. A CPA with a Master's in Law Firm Management from George Washington University, Chris is deeply committed to his client's success. At 3sixty Consulting, every member of our team has hands-on law firm experience, and our practical, personalized approach sets us apart.

[www.3sixtyconsultinggroup.com](http://www.3sixtyconsultinggroup.com)

# Special Events

THURSDAY, OCTOBER 17

## Conference Kick-Off Luncheon

12:05 p.m. – 1:45 p.m.

Celebrate the grand opening of the Legal Expo Hall at this energizing kick-off event – a convenient on-site lunch in the Expo Hall. It's the perfect opportunity to make new friends, visit with familiar faces, and check out the many unique products and services on display at the Expo. You can even start filling out your Passport to Prizes. *Sponsored by Paralegal Association of Wisconsin.*

## Attendee Reception

4:20 p.m. – 6:00 p.m.

On Thursday evening, unwind from a busy day and start making new connections while enjoying complimentary beer, wine, soda, hors d'oeuvres, and a cash bar, compliments of *Above the Bar Marketing; Kramer, Elkins & Watt, LLC; and WILMIC.*

## Barristers' Bowling Bash

6:00 p.m. – 8:00 p.m.

Join us at the Volcano Lounge and Lanes, located at the Kalahari, to enjoy some pizza and bowl on lanes reserved for Conference attendees, located inside Tom Foolery's, Kalahari's 100,000 sq. ft. adventure park. Challenge a friend or your kids to a skee-ball competition or test your driver at the virtual driving range! *Sponsored by Bakke Norman, S. C. and the Solo & Small Firm / General Practice Section.*

## Dine-Arounds

7:00 p.m.

Let us take care of your Thursday night dinner reservations! Sign up for a dine-around, each of which will be hosted by a WSSFC planning committee member at one of many top-notch restaurants in Wisconsin Dells. Enjoy thought-provoking, lively conversation over a delicious meal with colleagues. The on-site restaurant option is Cinco Niños and the off-site restaurant option is the Del-Bar.

Sign-up is easy. Just stop by the registration desk to add your name to your preferred dine-around. Stop by early, though. Space is limited and the spots will fill up quickly! Attendees are responsible for their dinner bill. Spouses or significant others are welcome, but please make other plans for the kids.

### BARRISTER'S BOWLING BASH

Thursday, 6:00 p.m. – 8:00 p.m.

Volcano Lounge & Lanes

Sponsored by:

**BAKKE**  **NORMAN**



Solo Small Firm &  
General Practice Section

FRIDAY, OCTOBER 18

## Continental Breakfasts

7:45 a.m. – 8:30 a.m.

Start your day off right with a hearty breakfast each morning. Plus, we're serving a deluxe continental breakfast on Friday. *Sponsored by Hupy & Abraham S.C.*

## Lederer Award Presentation and Networking Lunch

12:10 p.m. – 1:30 p.m.

Don't miss one of the highlights of WSSFC – the presentation of the 2024 Lederer Award. Named in memory of attorney John Lederer, the award is presented annually to an individual, group, or organization exemplifying John's leadership, spirit, and dedication. This is an **OPTIONAL TICKETED LUNCHEON AND KEYNOTE PRESENTATION**. To register, please stop by the Conference registration desk. *Sponsored by GoldFynch eDiscovery and Habush, Habush & Rottier.*

## Hospitality Suite

5:00 p.m. – 6:30 p.m.

On Friday evening, the fun doesn't stop. Join your colleagues in the Hospitality Suite for wine, beer, refreshments, and even prize drawings. It's THE place to be. *Sponsored by Krekeler Law, S.C.*

## Dine-Arounds

7:00 p.m.

Let us take care of your Friday night dinner reservations! Sign up for a dine-around, each of which will be hosted by a WSSFC planning committee member at one of many top-notch restaurants in Wisconsin Dells. Enjoy thought-provoking, lively conversation over a delicious meal with colleagues. The on-site restaurant option is the Double Cut and the off-site restaurant option is the House of Embers.

Sign-up is easy. Just stop by the registration desk to add your name to your preferred dine-around. Stop by early, though. Space is limited and the spots will fill up quickly! Attendees are responsible for their dinner bill. Spouses or significant others are welcome, but please make other plans for the kids.

### CONTINENTAL BREAKFASTS

Thursday 8:00 a.m. – 8:30 a.m. | South Atrium

Friday 7:45 a.m. – 8:30 a.m. | Expo Hall

Saturday 8:00 a.m. – 8:30 a.m. | Plenary Room (A/H)

Sponsored by  
**Hupy and Abraham** S.C.  
personal injury lawyers

### HOSPITALITY SUITE

Friday 5:00 p.m. – 6:30 p.m. | Room 3000, Sands Building

Enjoy wine, beer, and refreshments sponsored by:

**KREKELER Law, S.C.**  
ATTORNEYS AT LAW

# Visit this year's exhibitors to see how they can help you practice law, manage your business, and enjoy life.

3Sixty Consulting Group - **SPONSOR**

American Cancer Society

ARAG - **SPONSOR**

Bank of Sun Prairie

Books Grow Business

Bultman Financial

diaMetric Consulting

Digital Intelligence - **SPONSOR**

eCourt Reporters

GoldFynch eDiscovery - **SPONSOR**

Legal Fit

LexisNexis

Minnesota Lawyers Mutual

Insurance Company

Ogden, Glazer & Schaefer

Our Family Wizard

Paralegal Association of WI - **SPONSOR**

Pearl Insurance

Playmaker Coaching & Consulting

Professional Insurance Programs

Smokeball

Solo & Small Firm Section - **SPONSOR**

Spotlight Branding

Tavrn - **SPONSOR**

The Securities Lawyer (Halling & Cayo)

Timesolv

WILMIC - **SPONSOR**

Wisconsin Law Foundation

WI Probate Forms

Wisconsin State Public Defender

WisPACT

## ATTENDEE RECEPTION

Thursday 4:20 p.m. – 6:00 p.m. — Expo Hall  
Enjoy complimentary beer, wine and soda, plus a cash bar and hors'doeuvres sponsored by:



## WIN FABULOUS PRIZES

Have your **Passport to Prizes** signed by all the exhibitors for a chance to win valuable prizes. Passport to Prizes winners will be announced in the Legal Expo after the Networking Luncheon on Friday, but you need not be present to win.

Passport to Prizes forms are available at the Registration Desk and can be deposited at the State Bar booth when completed.

## Gold Sponsor



Drowning in deadlines  
and discovery costs?

**GoldFynch** is your  
eDiscovery lifeline!



[www.goldfynch.com](http://www.goldfynch.com)



**A REMINDER:**  
Please silence cell phones  
during the programs.

# Be sure to note room assignments each day for the CLE tracks.

PROGRAM LEVELS | FOUNDATIONAL | INTERMEDIATE | ADVANCED | ALL EXPERIENCE LEVELS

Thursday Schedule	Substantive Track	Practice Management Track	Technology Track Sponsored by Tabs3	Quality of Life/Ethics Track
8:00 a.m. – 5:00 p.m.	<b>Conference Registration</b> – Be sure to sign in each day! - Expo Hall			
12:00 p.m. – 6:00 p.m.	<b>Legal Expo Open</b> – South Atrium			
8:00 a.m. – 8:30 a.m.	<b>Continental Breakfast</b> – Sponsored by Hupy and Abraham, S.C. - South Atrium			
8:30 a.m. – 8:40 a.m.	<b>Opening Remarks</b> – Room A/H			
8:40 a.m. – 9:55 a.m.	<b>Plenary: Litigation ABCs: D is for Discovery...and Don't Distress (1.5 CLE)</b> – Cathleen A. Dettmann; Kevin J. Palmersheim – Room A/H			
9:55 a.m. – 10:10 a.m.	<b>Refreshment Break</b> – Sponsored by WILMIC – South Atrium			
<b>Session 1</b> 10:10 a.m. – 11:00 a.m.	<b>Working With Expert Witnesses: How to Not Feel Like a Novice (1.0 CLE)</b> Moderator: Kevin J. Palmersheim; Panelists: Cathleen A. Dettmann, Deanne M. Koll, Nicholas C. Watt <b>Room D</b>	<b>From Inception to Succession Series: Creating a Business Plan (1.0 LPM)</b> - J. David Krekeler, Shannon E. Wynn <b>Room E</b>	<b>Overcoming Obstacles: Implementation Mindset for Legal Tech (1.0 LPM)</b> - Jeffrey S. Krause <b>Portia/Wisteria</b>	<b>From Inception to Succession Series: Succession Planning (1.0 LPM)</b> - Brian C. Anderson, Brent J. Hoeft <b>Guava/Tamarind</b>
11:00 a.m. – 11:15 a.m.	<b>Refreshment Break</b> – Sponsored by GoldFynch eDiscovery – South Atrium			
<b>Session 2</b> 11:15 a.m. – 12:05 p.m.	<b>Alcohol Laws and Other Unique Rules and Regulations (1.0 CLE)</b> – Jeffrey M. Glazer, Collin Schaefer <b>Room D</b>	<b>From Inception to Succession Series: Digital Marketing Essentials for Law Firms: A Beginner's Guide (No CLE)</b> - Lindsay Marty, Stacy J. Schlemmer <b>Room E</b>	<b>Securely Sharing Documents (1.0 LPM)</b> - Nerino J. Petro, Jr., Bryan Sims <b>Portia/Wisteria</b>	<b>Alternative Fee Arrangements (1.0 EPR)</b> - Dean R. Dietrich, Timothy J. Pierce <b>Guava/Tamarind</b>
12:05 p.m. – 1:45 p.m.	<b>Conference Kickoff Luncheon (Ticketed Event)</b> – Sponsored by Paralegal Association of WI – Expo Hall			
<b>Session 3</b> 1:45 p.m. – 2:35 p.m.	<b>What Every Lawyer Should Know About Immigration Law (1.0 CLE)</b> - Amanda K. Gennerman, Aissa I. Olivarez, Gabriela Parra, Raluca Vais-Ottosen <b>Guava/Tamarind</b>	<b>The Power of Culture in Law Firms: Why It Matters, Building It Intentionally, and Its Effects on the Bottom Line (1.0 LAU)</b> - Ryan Behrands, Emily Smit, Mary C. Turke <b>Room E</b>	<b>Cybersecurity for Solo and Small Law Firms: Updates and Best Practices (1.0 LPM)</b> - Brent J. Hoeft <b>Portia/Wisteria</b>	<b>Protecting Your Firm and Clients When Making a Career Change (1.0 EPR)</b> – Thomas R. Schumacher, Thomas J. Watson <b>Room D</b>
2:35 p.m. – 3:00 p.m.	<b>Refreshment Break</b> – Sponsored by Tavrn – Expo Hall			
<b>Session 4</b> 3:00 p.m. – 4:20 p.m.	<b>Recent Changes to Estate Planning Laws (1.5 CLE)</b> - Catherine M. Priebe, Mark A. Shiller <b>Guava/Tamarind</b>	<b>The Effects of the Corporate Transparency Act on the Wisconsin Lawyer (1.5 LPM)</b> - Samuel J. Kavalier, Sam Wayne <b>Portia/Wisteria</b>	<b>AI and Legal Research (1.5 LPM)</b> - Christina Steinbrecker Jack <b>Room E</b>	<b>Unlock the Power of Adaptable Communication in Your Firm (1.5 LAU)</b> - Mike McKay <b>Room D</b>
4:20 p.m. – 6:00 p.m.	<b>Attendee Reception</b> – Enjoy wine and refreshments – Sponsored by Above the Bar Marketing; Kramer, Elkins & Watt, LLC; and WILMIC – Expo Hall			
6:00 p.m. – 8:00 p.m.	<b>Barrister Bowling Bash</b> – Sponsored by Bakke Norman and Solo/Small Firm & General Practice Section			
7:00 p.m.	<b>Dine-Arounds</b> – Meet at your selected venue at 7:00 p.m.			

Programs that will be offered as webcast replays.

Follow us on social media for conference updates, legal news, practice insights, and more. Use the conference hashtag #WSSFC to share your experience.



Friday Schedule	Substantive Track	Practice Management Track	Technology Track Sponsored by Tabs3	Quality of Life/Ethics Track
7:45 a.m. – 1:45 p.m.	<b>Legal Expo Open</b> – Expo Hall			
7:45 a.m. – 4:00 p.m.	<b>Conference Registration</b> – Be sure to sign in each day! – Expo Hall			
7:45 a.m. – 8:30 a.m.	<b>Continental Breakfast</b> – Sponsored by Hupy and Abraham, S.C. – Expo Hall			
8:00 a.m. – 8:30 a.m.	<b>A Deeper Look: State Bar of Wisconsin Group Health Plan Benefits for Law Firms</b> (No CLE Credit) - Guava/Tamarind			
8:30 a.m. – 9:50 a.m.	<b>Plenary: 25 Things Every Lawyer Should Know</b> (1.5 CLE) – Joseph W. Boucher, Mark J. Goldstein, J. David Krekeler, Heather B. Poster, Melissa A. Spindler – Room A/H			
9:50 a.m. – 10:10 a.m.	<b>Refreshment Break</b> – Sponsored by 3Sixty Consulting Group – Expo Hall			
<b>Session 5</b> 10:10 a.m. – 11:00 a.m.	<b>Election Law: How to Get Involved in Protecting Democracy</b> (1.0 CLE) - Edwardo E. Castro <b>Room D</b>	<b>From Inception to Succession Series: Strategic Budgeting for Law Firms</b> (1.0 LPM) - Adam Gardebrecht <b>Room E</b>	<b>What to Know About Copilot</b> (1.0 LPM) - Nerino J. Petro, Jr., Bryan Sims <b>Guava/Tamarind</b>	<b>50 Tips in 50 Minutes</b> (1.0 LAU) - Matthew Shin, Julie M. Spoke, Emily Logan Stedman, Emily Veenendaal <b>Portia/Wisteria</b>
11:00 a.m. – 11:20 a.m.	<b>Refreshment Break</b> – Sponsored by Paralegal Association of Wisconsin – Expo Hall			
<b>Session 6</b> 11:20 a.m. – 12:10 p.m.	<b>A Peaceful Home Away From Home: Riparian and Other Concerns Involving Family Cabins</b> (1.0 CLE) - Brian A. Schuk, Alyssa S. Wilson <b>Room D</b>	<b>How to Have Effective Firm Retreats and Meetings</b> (1.0 LPM) - Jessica M. Kramer, Mike McKay <b>Room E</b>	<b>E-Signature Technology and Remote Witnessing and Notarization Under Wis Stat. 140.147 and 140.145</b> (1.0 LPM) - Cheryl A. Hipenbecker, Brent J. Hoeft, Catherine M. Priebe <b>Guava/Tamarind</b>	<b>Risky Business When Representing Friends and Family</b> (1.0 EPR) - Matthew M. Beier, Erin R. Ogden <b>Portia/Wisteria</b>
12:10 p.m. – 1:30 p.m.	<b>Networking Lunch and Presentation of the 2024 Lederer Award</b> (TICKETED EVENT – PLEASE NOTE: You can still register for Friday's luncheon. Please stop by the Conference registration desk.) – Sponsored by GoldFynch Discovery and Habush, Habush & Rottier – Expo Hall			
1:30 p.m. – 2:30 p.m.	<b>Dessert Break</b> – Passport to Prizes and other Prizes Awarded – Sponsored by GoldFynch eDiscovery and Habush, Habush & Rottier – Room A/H			
<b>Session 7</b> 2:30 p.m. - 3:20 p.m.	<b>Consequences of Criminal Convictions on Other Legal Matters</b> (1.0 CLE) – Daniel J. Finerty, Pamela S. McAvoy, Timothy J. O'Brien, Aissa I. Olivarez <b>Room D</b>	<b>Getting Help: Virtual, Remote, or Part-Time Staff?</b> (1.0 LPM) - Jody L. Cooper, Ashley Quinto-Powell <b>Guava/Tamarind</b>	<b>Understanding Deepfake Technology</b> (1.0 LPM) Derek Riley <b>Portia/Wisteria</b>	<b>Conflicts When Representing Both Parties in a Legal Transaction</b> (1.0 EPR) - Dean R. Dietrich, Peyton B. Engle, Annabelle Vang <b>Room E</b>
3:20 p.m. – 3:40 p.m.	<b>Refreshment Break</b> – Sponsored by ARAG - South Atrium			
3:40 p.m. – 5:00 p.m.	<b>Plenary: Don't Try This at Home: Why You Should Never Emulate TV Lawyers</b> (1.5 EPR) - Sean Carter - Room A/H			
5:00 p.m. – 6:30 p.m.	<b>Hospitality Suite</b> – Enjoy wine and refreshments – Sponsored by Krekeler Law S.C. – <b>Room 3000 in Sands Building</b>			
7:00 p.m.	<b>Dine-Arounds</b> – Meet at your selected venue at 7:00 p.m.			

Saturday Schedule	Substantive Track	Practice Management Track	Technology Track Sponsored by Tabs3	Quality of Life/Ethics Track
7:45 a.m. – 10:00 a.m.	<b>Conference Registration</b> - Be sure to sign in each day! - South Atrium			
8:00 a.m. – 8:45 a.m.	<b>Continental Breakfast</b> – Sponsored by Hupy and Abraham, S.C. – Room A/H			
8:30 a.m. – 9:45 a.m.	<b>Plenary: Move Your Clients Up or Out</b> (1.5 LPM) – Jeffrey S. Krause – Room A/H			
9:45 a.m. – 10:15 a.m.	<b>Refreshment Break</b> – Sponsored by Solo & Small Firm Section – Room A/H			
10:15 a.m. – 11:45 a.m.	<b>Closing Plenary: Boomers, Millennials, &amp; Gen Z!: The Ethics of Marketing Across Generations</b> (1.5 EPR) – Andrew S. Adams, Scorpion – Room A/H			

Programs that will be offered as webcast replays.

## Day One

**Opening Plenary – 8:40 a.m. – 9:55 a.m.**

### Litigation ABCs: D is for Discovery...and Don't Distress

In this practical and engaging session, you'll receive guidance on how to effectively handle discovery as both proponents and respondents. The presenters will emphasize efficient strategies tailored for clients with limited resources for cases with modest stakes. Learn to prioritize essential elements for case preparation and trial, ensuring a streamlined discovery process.

Cathleen A. Dettmann, Palmersheim Dettmann, S.C., Middleton; Kevin J. Palmersheim, Palmersheim Dettmann, S.C., Middleton

**Breakout Session One – 10:10 a.m. – 11:00 a.m.**

### Working with Expert Witnesses: How to Not Feel Like a Novice F

Gain a solid foundation of the fundamentals of working with expert witnesses, including finding and retaining experts, supporting the expert's preparation of their report, and preparing for depositions and trial testimony.

**Moderator:** Kevin J. Palmersheim, Palmersheim Dettmann, S.C., Middleton;  
**Presenters:** Cathleen A. Dettmann, Palmersheim Dettmann, S.C., Middleton;  
Deanne M. Koll, Bakke Norman, S.C., New Richmond; Nicholas C. Watt, Kramer, Elkins & Watt LLC, Madison

### From Inception to Succession Series: Creating a Business Plan X

Whether you're just starting out or have been in practice for years, a business plan is valuable (and sometimes necessary) for

many reasons: to obtain financing, open a new office, recalibrate for profitability, or to expand or merge firms. Discover the basic elements, resources, and adaptations for a law firm specific business plan and leave with tools to help get you started on creating your own plan.

J. David Krekeler, Krekeler Law, S.C., Madison; Shannon E. Wynn, Wynn at Law LLC, Lake Geneva

### Overcoming Obstacles: Implementation Mindset for Legal Tech X

Successfully implementing legal technology starts with the right mindset to overcome resistance, outdated habits, and inefficient processes. Discover strategies to foster a tech-friendly environment, address human obstacles, and provide actionable steps to get everyone in your firm on board with legal tech advancements.

Jeffrey S. Krause, Affinity Consulting Group, Waterford

### From Inception to Succession Series: Succession Planning X

Understand the importance of planning not only for disability, death, and retirement, but any unplanned early cessation of practice. A good succession plan is crucial for the long-term health of your practice and to upholding ethical obligations to clients. You'll also discuss the emotional and mental impact of preparing to leave the practice of law.

Brian C. Anderson, Wisconsin Lawyers Mutual Insurance Company, Madison; Brent J. Hoeft, State Bar of Wisconsin, Madison



## BIG NEWS! Our Name Has Changed!

### Say hello to the Lawyer Referral Service (LRS)

While our name is new, our commitment to delivering top-notch legal referrals remains the same. At LRS, we focus on connecting you with the RIGHT clients, not just any new clients.

Grow your practice with prescreened clients from LRS.

**For more information or to join, call us at  
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## Breakout Session Two – 11:15 a.m. – 12:05 p.m.

### Alcohol Laws and Other Unique Rules and Regulations **F**

Delve into the changes ushered in by Act 73, overhauling Wisconsin's alcohol beverage regulations, including expanded retail options for producers, the new definition of "public spaces" prohibited from selling without a permit, and permitting options for wedding barn owners. You'll also explore lesser-known commercial laws such as the Fair Dealership Law and the Unfair Sales Act.

Jeffrey M. Glazer, Ogden, Glazer + Schaefer, Madison; Colin Schaefer, Ogden, Glazer + Schaefer, Cedarburg

### From Inception to Succession Series: Digital Marketing Essentials for Law Firms: A Beginner's Guide (No credit) **X**

Get an introduction to the fundamentals of digital marketing. Explore key strategies such as identifying your target audience, website optimization, SEO, content marketing, social media engagement, budget considerations, and more! You'll come away knowing how to effectively promote your services and reach clients in the digital age.

Lindsay Marty, Above the Bar Marketing LLC, Madison; Stacy J. Schlemmer, Peterson, Berk & Cross, S.C., Green Bay

### Securely Sharing Documents **X**

Explore secure ways to share documents and information, including document management systems, client portals, encrypted email, or

even electronic fax. Receive sound guidance on the options available and the pros and cons of each so you can find the best fit for your firm.

Nerino J. Petro, Jr., NerinoPetro LLC, Rockford, IL; Bryan Sims, Sims Law Firm, Ltd., Naperville, IL

### Alternative Fee Arrangements **X** **RF**

Today's consumer-savvy clients are accustomed to flexible and convenient pricing and payment options, making the standard billable-hours formula for legal services look like a remnant from the past. In this session, you'll explore alternative fee arrangements, walk through sample agreements, and consider relevant ethics rules.

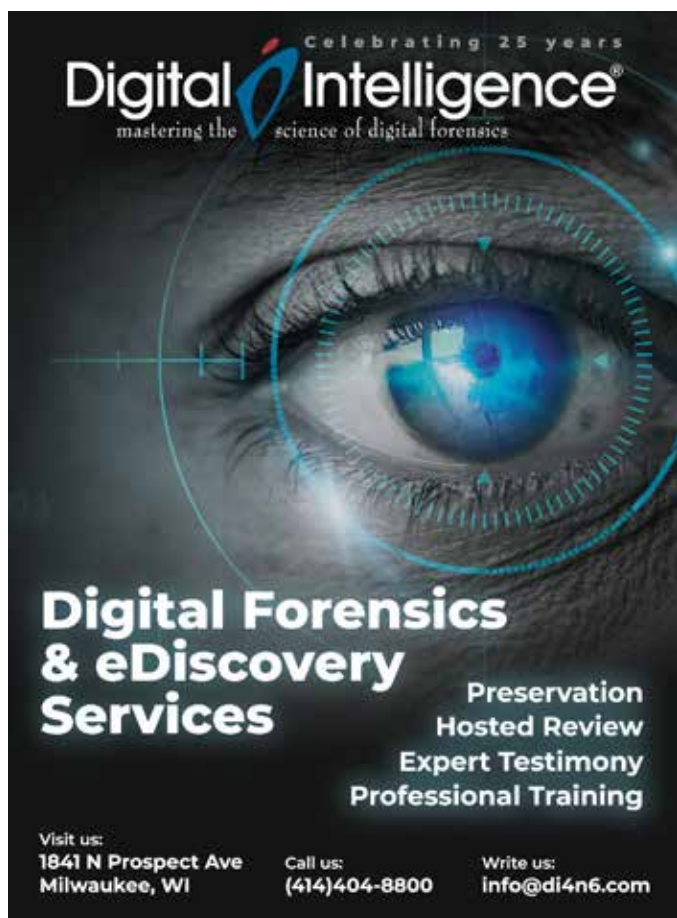
Dean R. Dietrich, Weld Riley, S.C., Wausau; Timothy J. Pierce, State Bar of Wisconsin, Madison

## Breakout Session Three – 1:45 p.m. – 2:35 p.m.

### What Every Lawyer Should Know About Immigration Law **F**

Receive a high-level overview of immigration laws non-immigration lawyers may encounter that impact other areas of practice such as employment, criminal, family, and intellectual property law.

Amanda K. Gennerman, Pines Bach LLP, Madison; Aissa I. Olivarez, Olivarez Law Firm LLC, Madison; Gabriela Parra, Layde & Parra, S.C., West Allis; Raluca Vais-Ottosen, DeWitt LLP, Madison



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## The Power of Culture in Law Firms: Why it Matters, Building it Intentionally, and its Effects on the Bottom Line X

You'll discover how to build a firm culture and how to create, implement, and track KPIs. You'll learn how to take the demographics of your team into account in adapting culture. Come away with tools to create the game-changing culture your team deserves and track its impact on firm performance.

Ryan Behrands, No Bull Consulting, Madison; Emily Smit, The Perk, Madison; Mary C. Turke, Turke & Steil LLP, Madison

## Cybersecurity for Solo and Small Law Firms: Updates and Best Practices X

In an era of ever-evolving cybersecurity threats, solo and small firm practitioners must stay vigilant. This session covers the latest cybersecurity updates, focusing on risks unique to smaller law practices. Learn best practices, tools, and strategies to protect sensitive client information, ensure compliance, and mitigate the risk of cyberattacks, keeping your practice secure in today's digital landscape.

Brent J. Hoeft, State Bar of Wisconsin, Madison

## Protecting Your Firm and Clients When Making a Career Change X

Discuss ethical and practical considerations to protect your firm and clients when you or a colleague make a career transition.

Thomas R. Schumacher, Bakke Norman, S.C., New Richmond; Thomas J. Watson, Wisconsin Lawyers Mutual Insurance Company, Madison

## Breakout Session Four – 3:00 p.m. – 4:20 p.m.

### Recent Changes to Estate Planning Laws I

Learn about recent changes to estate planning laws, including updates to Wisconsin's Trust Code and the new provisions for remote witnessing of estate planning documents (SB 898, 626, and 759). This intermediate-level session offers essential insights for practitioners navigating these developments.

Catherine M. Priebe, Certus Legal Group, Ltd., Milwaukee; Mark A. Shiller, Certus Legal Group, Ltd., Milwaukee

### The Effects of the Corporate Transparency Act on the Wisconsin Lawyer X

The Corporate Transparency Act (CTA) requires certain businesses to report their beneficial owners to the Department of the Treasury's Financial Crimes Enforcement Network. What does your firm need to do to ensure it's in compliance? Receive practical guidance on navigating the CTA and a walk through on completing the forms you'll need for compliance.

Samuel J. Kavalier, Ogden Glazer + Schaefer, Minneapolis, MN; Sam Wayne, Wayne Law, S.C., Madison

### AI and Legal Research F

Unveil the transformative power of artificial intelligence (AI) for legal research. Learn how AI is reshaping the way legal professionals conduct research, analyze case law, and predict legal outcomes. Explore the latest AI tools and platforms that streamline research

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Christina Steinbrecker Jack, vLex United States, Washington, D.C.

### Unlock the Power of Adaptable Communication in Your Firm

Effective communication across virtual, cultural, and generational divides is crucial. This interactive session helps you enhance your communication skills and connect with anyone, anywhere. Explore your personal communication style and learn how to recognize how others prefer to receive information. You'll come away with a toolkit of adaptable communication strategies to help you build trust, align goals, and achieve breakthrough results.

Mike McKay, ActionCOACH, Milwaukee

## Day Two

### Plenary Session – 8:30 a.m. – 9:50 a.m.

#### 25 Things Every Lawyer Should Know

No matter if your practice is specialized or general, a broad understanding of various substantive law issues is crucial. This rapid-fire primer will equip you with essential knowledge in bankruptcy, intellectual property, tax, employment, and elder law. Speakers will cover the five key points you need to know about each practice area, so you're equipped with the information every solo and small firm practitioner needs.

Joseph W. Boucher, Neider & Boucher, S.C., Madison; Mark J. Goldstein, Goldstein Law Group, S.C., Milwaukee; J. David Krekeler, Krekeler Law, S.C., Madison; Heather B. Poster, Becker, Hickey & Poster, S.C., Milwaukee; Melissa A. Spindler, Smith Keane LLP, Hartland

### Breakout Session Five – 10:10 a.m. – 11:00 a.m.

#### Election Law: How to Get Involved in Protecting Democracy

Receive an election year overview of Wisconsin and federal election laws, including updates, legal challenges, and amendments to Wisconsin's Constitution.

Edwardo E. Castro, Pines Bach LLP, Madison

#### From Inception to Succession Series: Strategic Budgeting for Law Firms

Join this interactive session to learn the fundamentals of budgeting, including managing fixed and variable costs, and accurately projecting revenue. Explore real-world scenarios to enhance your financial planning skills so you're well-prepared for challenges and growth opportunities. Gain valuable insights into effective financial management and the tools to ensure the financial success of your practice.

Adam Gardebrecht, Fine Point Consulting, Madison

#### What to Know about Copilot

Discover how Microsoft's Copilot can automate and support your firm. Copilot is a new feature designed to help you unleash your creativity, maximize productivity, and elevate your Microsoft 365 game. Available in Microsoft Bing, Edge, 365, and Windows, learn what Copilot is capable of and what it can do for you.

Nerino J. Petro, Jr., NerinoPetro LLC, Rockford, IL; Bryan Sims, Sims Law Firm, Ltd., Naperville, IL

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# How Authoring a Book Can Solve the Top 5 Marketing Challenges for Solo and Small Law Firms

By Mark Imperial



You wear many hats as a solo or small firm owner—from a legal expert to a business manager. Marketing often feels overwhelming, but it is crucial for your practice's growth and sustainability. Addressing your biggest marketing concerns can pave the way for more consistent client acquisition, a stronger brand presence, and better resource management. One strategy that can uniquely address these concerns is authoring a book. Here's how authoring a book can help tackle your top five marketing challenges fast and forever:

## 1. Boost Client Acquisition and Retention

For many solo or small firms, maintaining a steady stream of clients is the most significant challenge. Traditional marketing methods and word-of-mouth referrals can be unpredictable. A book can serve as a powerful tool for client acquisition and retention. By writing a book that speaks directly to your target audience's pain points and needs, you establish yourself as an authority in your area of law.

You may know attorneys who authored books to brand and grow their practices, including Joseph E. Cordell, author of *"The 10 Stupidest Mistakes Men Make When Facing Divorce"*, and Gerry Spence, author of *"How to Argue and Win Every Time."*

Imagine potential clients picking up your book and finding it addresses the exact issues they face. This not only builds trust but also creates a lasting connection. It increases immersion and positions you as the go-to expert before the first consultation. Clients who come through this avenue are often more committed and easier to retain, as they already feel connected to your approach and knowledge. Clients hire those who make them feel the most informed.

Plus, referrals come naturally because clients, media, and your referral partners easily recommend or give your book to others. There is no better referral tool than a book that delivers your message perfectly every time.

## 2. Build a Strong Brand and Online Presence

Standing out in a crowded legal market requires more than just a well-designed website and a few online ads. It requires a brand that resonates with your audience and tells a compelling story of who you are, what you stand for, and why clients should choose you. A book allows you to build this brand narrative in a way few other mediums can.

A book is a long-form demonstration of your knowledge, experience, and values. It is a permanent addition to your marketing arsenal that can drive traffic to your website, boost your social media presence, and provide content for blog posts, podcasts, or speaking engagements. By positioning yourself as an author, you separate yourself from other attorneys who only market through more conventional, less differentiated channels.

## 3. Manage Time and Resources Efficiently

A nagging pain point for solo attorneys is the constant juggling between managing and marketing their practice. Marketing takes time—time that many solo practitioners simply don't have. People think authoring a book sounds time-consuming, but it is a highly efficient use of your time in the long run. Our process helps clients author their book with only 20 minutes of their time per chapter, so it is no longer a chore. Get your book done once and for all, and leverage it for the life of your firm.

Instead of spending hours each week creating content for blogs, newsletters, or social media, a book is a comprehensive marketing asset that works around the clock. It can be broken down into smaller pieces of content used for months or even years. Whether it's a chapter that can be turned into a blog post or an excerpt shared in an email newsletter, the content from your book continues to provide value without requiring constant content creation efforts.

## 4. Navigate Ethical Marketing Practices

Attorneys must be cautious in how they market themselves. The legal profession has strict advertising guidelines to ensure that communications are truthful and not misleading. A book provides an excellent platform for ethical marketing. Unlike a quick social media post or a short ad, a book offers the space to communicate comprehensive, accurate, and valuable information that genuinely helps readers understand legal issues and how to approach them.

By presenting your knowledge in a book format, you avoid the pitfalls of superficial or overly promotional content. Instead, you provide a deep dive into and become known for your area of law, showcasing your expertise ethically and effectively. This helps build trust with your audience, ensuring they see you as a credible and reliable source of legal guidance.

## 5. Leverage Technology for Marketing

Keeping up with the latest marketing trends can be exhausting. However, a well-written book can be the cornerstone of a broader digital marketing strategy. It provides a foundation for various channels—from podcasts and webinars to online courses and email marketing campaigns.

When you leverage your book as the basis for digital content, you can create a cohesive online presence that reinforces your expert authority and expands your reach. For example, you can host webinars or podcasts based on chapters from your book, further cementing your status as an expert. You can also offer digital versions or excerpts of your book as lead magnets to grow your email list, bringing in more potential clients into your marketing funnel.

## Your Book Will Be Your Most Effective Marketing Tool

A book does more than market your services—it positions you as an authority, builds trust, provides long-term value, and creates a platform for ethical and effective communication. It's a strategic investment that addresses your marketing concerns, helping you stand out in a competitive market, attract the right clients, and build a lasting, successful practice.

Visit Mark's booth at the conference or go to [www.BooksGrowBusiness.com](http://www.BooksGrowBusiness.com).

*Mark Imperial is a distinguished best-selling author and marketing strategist with over three decades of experience. Certified by the legendary Dan S. Kennedy, Mark has helped over 800 professionals—including nearly 200 attorneys—become published authors, enhancing their authority and positioning them as thought leaders. His insights have also reached thousands of business owners through his No BS Marketing Letter columns and his hands-on work with globally acclaimed brands like Nintendo™, Pokémon™, and Under Armour™.*



## 50 Tips in 50 Minutes **X**

This WSSFC favorite is back by popular demand, but this time with a quality-of-life track twist! Discover useful hacks and tricks designed to improve your wellbeing. Hear rapid-fire tips you can implement right away to make your life and your practice more efficient, rewarding, and enjoyable!

Matthew Shin, Sidebar Counseling, LLC, Wausau; Julie M. Spoke, Office of Lawyer Regulation, Madison; Emily Logan Stedman, Husch Blackwell, Milwaukee; Emily Veenendaal, MSN, PMH-BC, Western Wisconsin Health, Baldwin

### Breakout Session Six – 11:20 a.m. – 12:10 p.m.

## A Peaceful Home Away from Home: Riparian and Other Concerns Involving Family Cabins **F**

There's no room for assumptions when it comes to the future ownership and management of a family property. Help clients create a framework for the future, accounting for scheduled use, buyout of family members, repairs and maintenance, money for property upkeep, and more. In addition to estate planning issues, you'll explore questions about riparian rights.

Brian A. Schuk, Schuk Law LLC, Lake Geneva; Alyssa S. Wilson, Schuk Law LLC, Lake Geneva

## How to Have Effective Firm Retreats and Meetings **X**

In this interactive session, you'll learn strategies to get more value and productivity out of your staff meetings and firm retreats. Come away with a toolkit of techniques to run more efficient, impactful staff meetings, making your firm meetings productive and, in turn, being able to spend more of your time practicing law and billing hours. If you've never held a firm retreat but are considering it, you'll leave this session with resources to help you get started!

Jessica M. Kramer, Kramer, Elkins & Watt, LLC, Madison; Mike McKay, ActionCOACH, Milwaukee

## E-Signature Technology and Remote Witnessing and Notarization Under Wis. Stat. §§140.147 and 140.145 **X** **F**

Explore the evolving world of electronic signatures and remote notarization. This session focuses on the technology available to help you comply with recent amendments to Wis. Stat. §140.147 and authorizing remote ink notary (RIN) and witnessing signatures for estate planning and Wis. Stat. §140.145, authorizing remote online notarization (RON) in real estate and business transactions, and general use of e-signature technology for everyday documents. Get a comprehensive overview of the legal framework, practical applications, available options, and best practices for using e-signature and remote notarizations.

Cheryl A. Hipenbecker, Knight Barry Title, Inc., Milwaukee; Brent J. Hoelt, State Bar of Wisconsin, Madison; Catherine M. Priebe, Certus Legal Group, Ltd., Milwaukee



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## Risky Business when Representing Friends and Family

How many times has a friend or family member come to you for legal advice, even if it's not related to your practice areas? At this session, you'll discuss the benefits, risks, and key ethical considerations when deciding whether to represent friends or family members.

Matthew M. Beier, Wisconsin Lawyers Mutual Insurance Company, Madison; Erin R. Ogden, Ogden Glazer + Schaefer, Madison

## Breakout Session Seven – 2:30 p.m. – 3:20 p.m.

### Consequences of Criminal Convictions and Other Legal Matters

Explore the wide-ranging consequences of criminal convictions or proceedings in various legal settings. Discover how criminal convictions impact bankruptcy cases, particularly nondischargeability proceedings, and their effects on employment opportunities and rights. You'll also discuss the implications for family law matters and the significant potential immigration consequences, including deportation.

Daniel J. Finerty, Lindner & Marsack, S.C., Milwaukee; Pamela S. McAvoy, Gabert, Williams, Konz & Lawrynk, LLP, Appleton; Timothy J. O'Brien, Bakke Norman, S.C., Eau Claire; Aissa I. Olivarez, Community Immigration Law Center, Madison

### Getting Help: Virtual, Remote, or Part-Time Staff?

You know you need help, but you don't want to or can't afford to hire a full-time employee. Compare and contrast three potential options: (1) artificial intelligence; (2) hiring a vendor or freelancer that provides remote staff on a limited basis; and (3) hiring a part-time employee. Hear candid analysis of the benefits and drawbacks of each option so you can decide what might work best for your practice.

Jody L. Cooper, Cooper Law Office, Milton; Ashley Quinto-Powell, My VA Rocks, Madison

## Understanding Deepfake Technology

Deepfakes are among the most effective, and therefore threatening, tools of disinformation. But what exactly is a deepfake? In this session, you'll receive the answer to that question and learn ways to distinguish authentic from inauthentic content using tools such as metadata, video and audio cues, and Google.

Derek Riley, Ph.D., Milwaukee School of Engineering, Milwaukee

## Conflicts when Representing Both Parties in a Legal Transaction

Is it ever okay for a lawyer to represent both sides of a legal transaction? It's common for parties to a transaction to want to save money by hiring only one attorney, but is it a good idea? Are there certain practice areas that are better suited to this type of arrangement? Get answers to these questions and explore the ethical considerations involved in representing both sides.

Dean R. Dietrich, Weld Riley S.C., Wausau; Peyton B. Engel, Hurley Burish S.C., Madison; Annabelle Vang, Kowalski, Wilson & Vang LLC, Madison

## Plenary Session – 3:40 p.m. – 5:00 p.m.

### Don't Try This at Home: Why You Should Never Emulate TV Lawyers

In this multimedia presentation, legal humorist Sean Carter explores the often-outrageous behavior of TV lawyers and its real-life implications. Through entertaining examples, you'll see some of the worst TV lawyer antics and discuss how similar, though less extreme, behaviors can sometimes infiltrate real-life legal practice. You'll find out how such conduct can undermine a lawyer's ability to effectively serve clients and uphold professional standards.

Sean Carter, Mesa CLE, Mesa, AZ


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## Day Three

### Plenary Session – 8:30 a.m. – 9:45 a.m.

#### Move Your Clients Up or Out

In a military career, the traditional maxim is “up or out” – you either progress or move on. And in legal practice, we all have clients we enjoy working with and others we dread hearing from. The best clients are those who are easy to work with, pay promptly, and refer other great clients. In this session, you’ll apply Moneyball concepts to grade your clients on various criteria and learn techniques to elevate your “C clients” into “B clients” and “B clients” into As, so you’re delivering quality service to clients you want to work with.

Jeffrey S. Krause, Affinity Consulting Group, Waterford

### Closing Plenary Session – 10:15 a.m. – 11:45 a.m.

#### Boomers, Millennials, & Gen Z!: The Ethics of Marketing Across Generations

Looking to expand your client base? Discover how to invigorate your marketing strategy and connect with clients across different generations. Delve into the expectations of each generational group, the tools and technologies needed to reach younger clients, and how to update your web presence to appeal to all ages. Gain insights into the ethical considerations of marketing your firm, including social media and texting/online chatting.

Andrew S. Adams, Scorpion, Los Angeles, CA

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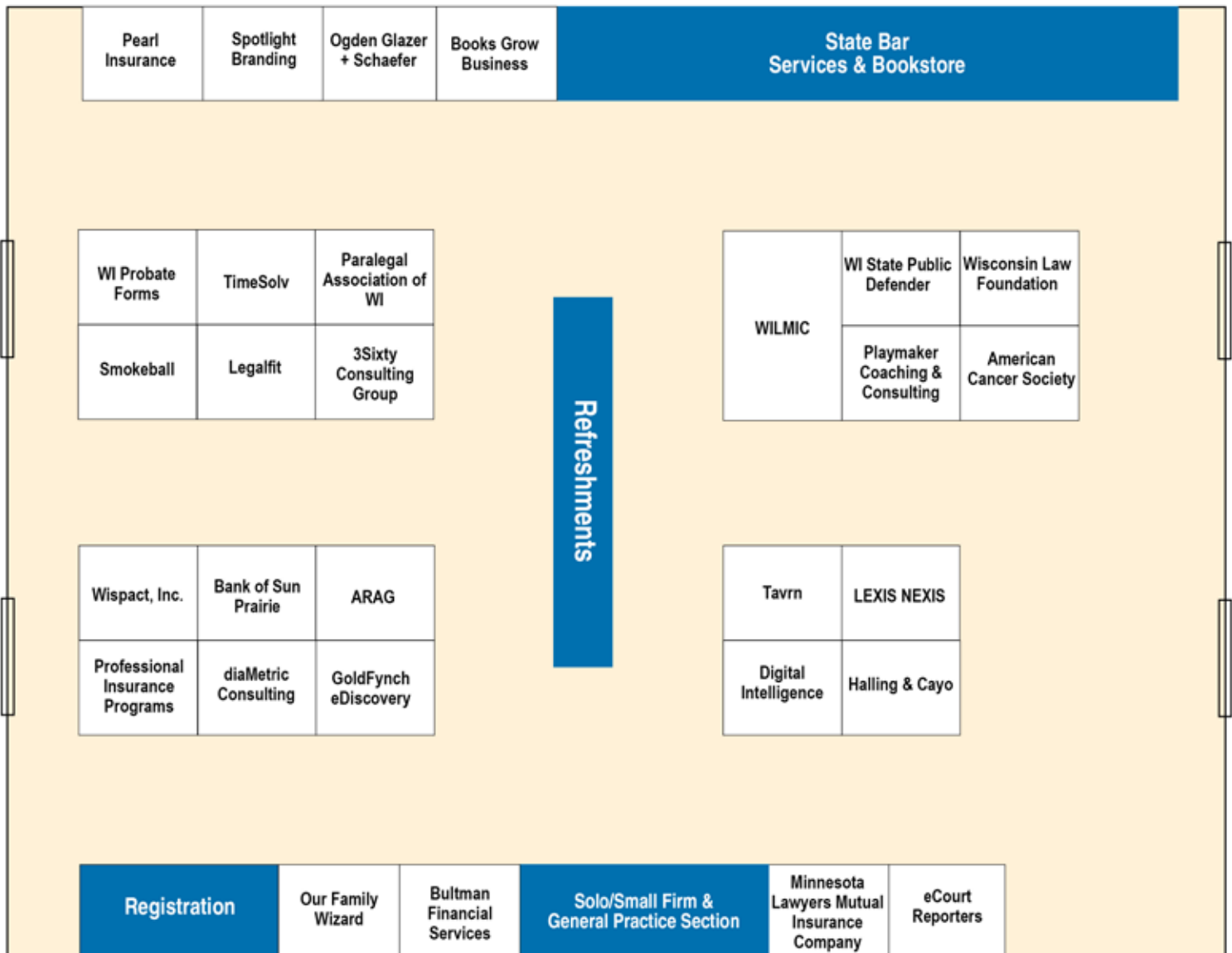
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## EXHIBIT HALL MAP



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hupy.com

Founded in 1969 – celebrating more than 50 years of service and results – personal injury law firm Hupy and Abraham, S.C. has a record of success, collecting over \$1 Billion dollars for over 70,000 satisfied clients. With 11 offices in Wisconsin, Illinois and Iowa, the firm has a reputation of providing sound legal representation to accident victims and giving back to the community. The firm has donated more than \$1 million to thousands of charitable organizations. Hupy and Abraham, S.C. has received top ratings from national professional organizations and is consistently voted best by the public.

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## **Krekeler Law, S.C.**

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The Paralegal Association of Wisconsin (PAW) is committed to advancing professional growth, continuing education, and excellence in the legal community. We focus on education, networking, and advocacy to elevate the role of paralegals as key contributors. Join us in shaping the future of the paralegal profession!

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wilmic.com

Created by Wisconsin lawyers in 1986 to protect the financial security of lawyers like themselves and the clients they serve, WILMIC continues to demonstrate a leading commitment to Wisconsin’s legal community. No company is more trustworthy than WILMIC when you’re facing a legal malpractice claim. Find peace of mind with WILMIC.

## **3sixty Consulting Group PLATINUM LEVEL**

3sixtyconsultinggroup.com

3sixty Consulting Group partners with small law firms to deliver financial and operational services at a fraction of the cost of a full-time executive. Backed by over 30 years of experience, we help organizations meet their goals by providing impactful solutions, with a hands-on approach, tailored to clients’ specific needs.

## **ARAG PLATINUM LEVEL**

ARAGlegal.com

ARAG connects attorneys with members on its legal insurance plan to handle everyday legal matters. Attorneys on the ARAG Network can choose the cases they want to take and are paid directly by ARAG. Network Attorneys never pay any fees to join or work with members.

## **Tavr PLATINUM LEVEL**

tavr.ai

Tavr provides high-accuracy, high-speed medical chronologies and summaries tailored for attorneys. Utilizing state-of-the-art artificial intelligence, Tavr processes thousands of medical record pages from various specialties, delivering meticulously crafted medical chronologies for litigation purposes in less than 12 hours.

# Exhibitor Directory (continued)

## American Cancer Society SILVER LEVEL

cancer.org

The American Cancer Society is a leading cancer-fighting organization with a vision to end cancer as we know it, for everyone. They are improving lives as the only organization combating cancer through advocacy, research, and patient support, to ensure that everyone has an opportunity to prevent, detect, treat, and survive cancer. Every cancer. Every life.

## Assigned Counsel Division of the Wisconsin State Public Defender SILVER LEVEL

www.wisspd.gov/assigned-counsel-division

The Assigned Counsel Division of the Wisconsin State Public Defender is seeking private bar attorneys interested in certification to accept appointments to trial and appellate cases.

## Bank of Sun Prairie SILVER LEVEL

bankofsunprairie.com

Big-bank services. Community-bank attention. Partner with Bank of Sun Prairie to help you with everything from trust and estate administration to establishing accounts for workers' compensation settlement recipients and merger and acquisition escrows. Our expert team of seasoned business bankers and attorneys give you the hands-on, high-touch attention you deserve so you can handle the important matters of your clients. Serving law firms throughout Wisconsin.

## Books Grow Business SILVER LEVEL

booksgrowbusiness.com

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## Bultman Financial Services SILVER LEVEL

bultmanfinancial.com

At Bultman Financial Services, we believe in sound financial preparation and insuring against risk. We specialize in individual and small group health, Medicare, dental, vision, life, long-term care disability and cyber insurance.

## DiaMetric Consulting Group LLC SILVER LEVEL

dia-metric.com

DiaMetric Consultants are time management, organization and productivity experts. Our one-on-one empowerment coaching and personalized strategies will help you achieve your goals, conquer deadlines and take control of your day.

## Digital Intelligence GOLD LEVEL

digitalintelligence.com

Digital Intelligence is a locally owned and internationally recognized leader in the field of computer forensics and eDiscovery offering a complete line of services including preservation, forensic analysis, document review and expert testimony. Our expert team of forensic examiners and legal professionals provide innovative solutions to help simplify the legal and technical challenges faced by attorneys, corporations, and government agencies with a focus on best practices, efficiency, and managing costs associated with electronic evidence.

## eCourt Reporters SILVER LEVEL

ecourtreporters.com

eCourt Reporters' secure database enables law firms to directly schedule certified court reporters and legal videographers. eCourt Reporters has service providers in all 50 states and is based in Wisconsin.

## GoldFynch eDiscovery GOLD LEVEL & SPONSOR

goldfynch.com

GoldFynch offers affordable eDiscovery for smaller firms with zero learning curve, delivering exceptional user experience, competitive pricing, unmatched file type support, and bank-grade security for efficient discovery management.

## The Securities Lawyer (Halling & Cayo) SILVER LEVEL

The-Securities-Lawyers.com/referrals

The Securities Lawyers practice group at Halling & Cayo S.C. helps investors recover their investment losses resulting from negligence or fraud by their stockbroker or financial advisor: www.The-Securities-Lawyers.com/referrals

## Legalfit SILVER LEVEL

legalfit.com

Legalfit, a Centerbase company, is the premier digital marketing platform exclusively for law firms that supports leveraging practice area expertise and personalized digital marketing strategies to drive brand recognition and optimize profitable client growth. Founded in 2015 with offices in Kansas City and Dallas, Legalfit currently serves more than 1,500 clients. Learn more at legalfit.com.

## LexisNexis SILVER LEVEL

lexisnexis.com

LexisNexis Legal & Professional is a leading global provider of legal, regulatory and business information and analytics that help customers increase productivity, improve decision-making and outcomes, and advance the rule of law around the world.

## Minnesota Lawyers Mutual Insurance Company SILVER LEVEL

mlmins.com

Since 1982, Minnesota Lawyers Mutual Insurance Company (MLM) has provided professional liability insurance and risk management services in Wisconsin and 15 other states. MLM is an efficient, accountable and permanent practice management resource.

## Ogden Glazer + Schaefer SILVER LEVEL

ogs.law

At Ogden Glazer + Schaefer, we "make things as possible, but no simpler." We help you help your clients with food and beverage law and intellectual property.

## OurFamilyWizard SILVER LEVEL

ourfamilywizard.com

With OurFamilyWizard, family law professionals and parents have access to a suite of tools designed to support effective co-parenting, help assure compliance, and deliver more optimal results for children.

Learn more about our fee waiver program, free professional access, and updated model order language. Contact nsotos@ourfamilywizard.com.

## Paralegal Association of Wisconsin (PAW) GOLD LEVEL & SPONSOR

wisconsinparalegal.org

The Paralegal Association of Wisconsin (PAW) is committed to advancing professional growth, continuing education, and excellence in the legal community. We focus on education, networking, and advocacy to elevate the role of paralegals as key contributors. Join us in shaping the future of the paralegal profession!

## Pearl Insurance SILVER LEVEL

pearlinsurance.com

Pearl Insurance is a privately held insurance agency specializing in Legal Malpractice Insurance, Cyber Insurance, and business insurance for law firms. Pearl is the exclusive underwriter for CNA's legal malpractice insurance program for Wisconsin law firms.

### Playmaker Coaching & Consulting SILVER LEVEL

playmakercoach.com

Unlike marketing agencies, we take a broader approach to sales and marketing. As your Fractional CMO, we generate leads, conversions, and raving fans using a winning system. Jennifer Hensley, our founder, leverages 20+ years in financial services, coaching, and sports to address complex problems with a big-picture understanding.

### Professional Insurance Programs SILVER LEVEL

insuranceformembers.com

Professional Insurance Programs is an independent agency offering customized insurance and risk management solutions for professionals. We are the exclusive provider of the State Bar of Wisconsin Group Health Plan for law firms.

### Smokeball SILVER LEVEL

smokeball.com

Smokeball is the industry's leading cloud-based legal practice management software. Our all-in-one platform automatically records time spent on each matter, so you earn more without working more. Complete documents with a few clicks using Smokeball's library of 20,000+ pre-loaded forms and robust Microsoft Office integration. And work from anywhere, thanks to Smokeball's on- and offline capabilities. Regardless of how you bill, Smokeball provides you with the insights and tools to easily Run Your Best Firm.

### Spotlight Branding SILVER LEVEL

spotlightbranding.com

Spotlight Branding offers content marketing services for solo & small law firms, emphasizing referrals and growth through blogs, videos, social media, newsletters, websites, and podcasts focusing on consistent and engaging content.

### State Bar of Wisconsin Solo & Small Firm Section GOLD LEVEL

wisbar.org

Enhancing the quality of practice for the solo and small firm lawyer, as well as the lawyer who has interests beyond the bounds of a single professional practice area.

### TimeSolv SILVER LEVEL

timesolv.com

TimeSolv is the #1 solution for lawyers who demand robust timekeeping, billing, and payments. Don't pay extra for bloated software and get bogged down in features you'll never use. Try for free at timesolv.com.

### Wispect Inc. SILVER LEVEL

wispect.org

Wispect Inc. is a private nonprofit organization that administers pooled and community Special Needs Trusts for people with disabilities. Based in Madison, Wispect manages the Special Needs Trusts for more than 4,500 people throughout Wisconsin. For more information, contact: Wispect, 226 Corporate Dr., Madison, WI 53714, Phone: (608) 268-6006

### Wisconsin Law Foundation SILVER LEVEL

wisbar.org/aboutus/WisconsinLawFoundation

The Wisconsin Law Foundation is the charitable arm of the State Bar of Wisconsin and supports programs that promote the public understanding of law, improve the administration of justice, or advance public service programs that improve the vision of the American justice system. Since 1996, the Foundation has distributed more than \$300,000 in grants on behalf of the legal profession.

### Wisconsin Probate Forms SILVER LEVEL

wisprobateforms.com

Several years ago I created Wis Probate Forms, a PDF document that utilizes two data entry pages to complete most documents needed to complete informal or formal probate, including auto calculation! I now share WPF with my fellow probate practitioners who also want to save time and improve accuracy.



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WACDL's Annual President's Seminar Conference  
State Bar of Wisconsin Annual Meeting Conference  
State Bar Solo & Small Firm Conference  
Tuscola County Bar Association CLE Presentation  
Wisconsin State Defender's Conference  
Wisconsin Local Bar Lawyers Conference  
Wisconsin Annual Frank Dwyer Deans Seminar  
State Bar of Wisconsin  
State Bar Real Estate Training Update  
Wisconsin Lawyers Contributing Award  
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