



NCPO FALL WORKSHOP • OCTOBER 4 & 5, 2011

BUFFALO THUNDER RESORT & CASINO
SANTA FE, NEW MEXICO

Tuesday, October 4, 2011

11:00 am – 1:00pm **Registration**

1:00 pm – 1:30 pm **Welcome & Introductions**

Welcome Remarks –

- Hon. Edward L. Chavez, Justice, New Mexico Supreme Court
- Drew Cloutier, New Mexico State Bar and the New Mexico Client Protection Fund.
- Hon. Richard Bosson, Justice, New Mexico Supreme Court

Review the agenda for the Workshop

Housekeeping Items

1:30 pm – 1:45 pm **Updates from the ABA Standing Committee on Client Protection**

- John Holtaway, Lead Senior Counsel, Client Protection & Policy Implementation, ABA
- Selina Thomas, Associate Client Protection Counsel, ABA

1:45 pm – 2:00 pm **Break**

2:00pm – 4:30 pm **Thriving Lawyers**

Legal professionals are subject to varying levels of stress beginning with the demands of law school and continuing throughout the practice of law. Lesley A. Russo, Esq. is a 1986 graduate of Harvard Law School and a partner in the regional law firm of Bowles, Rice, McDavid, Graff, & Love, PLLC, specializing in the fields of employee benefits and non-profit organizations. In 2010, she completed a Masters of Applied Positive Psychology degree at the University of Pennsylvania, becoming one of a handful of lawyers to graduate from this program with the purpose of bringing the science of flourishing and well-being to the legal profession. She is a Board member and officer of the Thriving Lawyers Institute and the Global Well-Being Institute.

Ms. Russo will explore the recent explosion of neuroscience findings on ways that mindfulness practices can combat the ravages of stress. Current and future practitioners, as well as those who work with lawyers in the fields of Ethics and Client Protection, will benefit from this session not only due to increased knowledge about the scientific findings around lawyers and stress, but by experiential practices that show ways to build resources within oneself and others that lead to flourishing and thriving in our often stress-filled lives.



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4:30 pm – 5:00 pm **Town Hall**

Share with everyone what's happening with your own Fund. Accomplishments and successes of the prior year, current issues and challenges that you are facing, etc.

- Dan Hendi, Director, New Jersey Lawyers' Fund for Client Protection

5:30 pm – 7:00pm **Reception**

7:00 pm **Dinner**

Wednesday, October 5, 2011

7:30 – 8:30 am **Breakfast**

8:30 am – 9:30 am **Loan Modification Scams**

A discussion on what it is and what can be done about the scams. What are some of the signs that you have a problem? What sort of roles have we seen so far? What are the potential multi-state, multi-jurisdictional issues? How is the internet used to promote and market legal services? Are geographic jurisdictions meaningless or difficult to work with?

- Tim O'Sullivan, Executive Director & Counsel, Lawyers' Fund for Client Protection of the State of New York
- Kathy Peifer, Executive Director, Pennsylvania Lawyers' Fund for Client Security

9:30 am – 10:30 am **Is Dying Dishonest Conduct?**

What can we do when an attorney with an active practice dies unexpectedly? How does your Fund handle that situation?

- Eileen Donahue, Director, Client Protection Program, Illinois Attorney Registration & Disciplinary Commission
- Ed Ehler, Acting Deputy Director, New Jersey Lawyers' Fund for Client Protection
- Kathy Peifer, Director, Pennsylvania Lawyers' Fund for Client Security

10:30 am – 10:45 am **Break**



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10:45 am – 12:00 pm **Lawyers who Practice More Than Law**

Many lawyers are now involved in more than the practice of law. How do you deal with attorneys who have dual roles? Such as attorneys who also serve as insurance brokers or agents, or who also provide estate planning services, or who also do financial planning. How does one define lawyer conduct under those circumstances?

- Ruby Cochran, Deputy Counsel, New Jersey Lawyers' Fund for Client Protection
- Fred G. Miller, retired Executive Director, Lawyers' Fund for Client Protection of the State of New York

12:00 pm – 1:00 pm **Lunch**

1:00 pm – 3:00 pm **Case Management Systems**

A number of Funds have expressed the need to better manage their Claims for Reimbursement. Come hear two software providers talk about what they are doing for the Funds that they are working with. NCPO does not endorse any particular provider. But listen to what others are doing.

- Paul Mansfield, Paul Mansfield Consulting
- Tom Nyilasi, Dulles Technology Partners

3:00 pm – 3:15 pm **Break**

3:15 pm – 4:15 pm **Protecting Your Fund's Reserves**

Many Funds have had their reserves threatened. What can you do to protect the reserves that you have? Join the discussion and listen to what some have done or are doing.

- Patrick Roberson, Cornblatt, Bennett, Penhallegon & Roberson Trustee, Client Protection Fund of the Bar of Maryland

4:15 pm – 4:30 pm **Wrap Up**