



PRACTICE MANAGEMENT

ADVISORY
SERVICE

Practice 360° Newsletter

Calendar

Networking

**Thursday, September 12,
Noon**

What Small Firm Lawyers Need to Know about Malpractice Insurance, presented by Mike Mooney of [USI Affinity](#).

The D.C. Bar, 901 Fourth Street NW, Washington, DC

RSVP

to lunchandlearn@dcbar.org

Friday, September 13, 12:30 p.m.

Alto Fumo, 2909 Wilson Boulevard, Arlington, VA (Clarendon Metro)

RSVP

to steven@stevenkriegerlaw.com

Friday, September 27, Noon

Barrel & Crow, 4867 Cordell Ave., Bethesda, MD (Bethesda Metro)

RSVP

to mark@markdelbianco.com

Successful Small Firm Practice Course

Registration is open for the [Successful Small Firm Practice Course](#) with both weekday and weekend sessions available.

Learn how to launch, grow and manage your law firm in this free program for D.C. Bar members and their staff. Rochelle D. Washington will lead the Monday sessions from Noon-2 p.m. from September 9 through November 4, 2019. Daniel M. Mills will lead the weekend sessions on September 14 and November 16, 2019 from 8:30 a.m. to 4:30 p.m. All sessions are at the D.C. Bar, 901 Fourth Street NW, DC.

Register or inquire at SmallFirmCourse@DCBar.org. When registering, specify weekday or weekend sessions.

Lunch and Learn

All programs begin at Noon. You may attend in person or by video conference. Register for any or all at lunchandlearn@dcbar.org

September 12, 2019

What Small Firm Lawyers Need to Know about Malpractice Insurance, presented by Mike Mooney of [USI Affinity](#).

Selecting malpractice coverage is important for lawyers in a firm of any size. How much coverage is needed? How much should it cost? How does the cost of defense affect the premium and

Law is a relationship business. Bring cards to share. Do RSVP so you will be notified of any event updates.

PMAS Events

September 9 – Successful Small Firm Practice Course (Weekday - Session 1)

September 11 – Day 1 of Basic Training & Beyond

September 12 – Lunch and Learn, What Small Firm Lawyers Need to Know about Malpractice Insurance

September 14 – Successful Small Firm Practice Course (Weekend - Session 1)

September 16 – Successful Small Firm Practice Course (Weekday - Session 2)

September 18 – Day 2 of Basic Training & Beyond

September 23 – Successful Small Firm Practice Course (Weekday - Session 3)

September 26 – Lunch and Learn, iPhone Forensics: An Update On Capabilities from the Trenches

September 30 – Successful Small Firm Practice Course (Weekday - Session 4)

Ethics

New ethics guidance on **Mandatory Arbitration Provisions in Fee Agreements.** [Legal Ethics Opinion 376](#)

coverage? How can a fee dispute affect coverage? What happens if the lawyer changes providers? This informative program explores these topics and other issues such as: where malpractice claims originate; malpractice insurance policies; how to determine appropriate coverage; and selecting a carrier, policy, and broker.

September 26, 2019

iPhone Forensics: An Update on Capabilities from the Trenches, by Mike Maschke of [Sensei Enterprises](#).

Year after year, Apple continues to release new hardware models and updates to its iOS operating system. Digital forensic capabilities have grown over time and now we are able to recover more data than ever that may be vital to your case. Come learn about some of the new types of information that forensics can uncover, along with updates on capabilities to recover communications and other important user generated data.

Basic Training & Beyond

Our monthly [Basic Training & Beyond](#), is set for September 11 and 18 at 9:15 a.m. – 4:30 p.m.

Register at BasicTraining@dcbar.org

This program has been attended by more than 3,000 lawyers and many have launched and are operating small law firms.

PMAS Links, Discounts and Free Downloads

[Law Firm Management Assessment \(Self-Check\)](#)

[Small firm legal trends and compensation reports](#)

[e-Manual for Basic Training & Beyond](#)

What are the ethical implications of crowdfunding a legal representation? Read [Legal Ethics Opinion 375](#) for guidance.

What are your obligations to a prospective client? Read [Legal Ethics Opinion 374](#) to find out.

Have you read the Legal Ethics Opinions on *social media and lawyers*?
[Legal Ethics Opinion 370](#)
[Legal Ethics Opinion 371](#)

Other Events

[Continuing Legal Education programs](#)

[Communities Events](#)

[Pro Bono Center training programs](#)

[More PMAS programs](#)



From the Desks of Dan and Rochelle



If you create lots of digital files and folders but are not inclined to use a case management application or third-party program to manage and keep track of them, how can you use *File Explorer* in Windows or *Finder* on a Mac to manage and quickly locate what you need? Here are some ideas:

- Label each file starting with a date such as 190905 (YYMMDD) so the documents within each folder line up chronologically, which is often the way we think of a document (“when did that

happen"). If it was late in 2018, you know to start there.

- Use long descriptions such as *190905 Notes on conference with Sue and Bob XYZ PLLC*, then keep the document in a folder labeled XYZ PLLC. *180211 Ltr to client re draft of wills Alice & Joseph Smith*, would be in the Smith Alice Joseph folder and in a sub-folder named *Client Correspondence*. Using sub-folders and labeling them by subject, allows you to find what you need quickly.
- When a folder has a lot of information, break it up by year.
- With a multi-client matter, the *Client Correspondence* folder should have a sub-folder for each client. With several lawyers in a matter, the *Attorney Correspondence* folder should have a separate subfolder for each lawyer.
- Use [*Spotlight*](#) in OS or [*Search Quick Access*](#) in Windows to get quick access to what you need.

--Dan

Dan & Rochelle

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CLEAR PERSPECTIVES
that you can count on

INTELLIGENCE THAT WORKS



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