# **19th SOLO & SMALL** FIRM CONFERENCE

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## **19TH SOLO & SMALL FIRM CONFERENCE** THE HOW-TO TOOLKIT

**JUNE 19** 

9:00 a.m. - 4:30 p.m.

## AGENDA AT-A-GLANCE

8:00 - 9:00	Breakfast, Exhibitors, and The InfoXchange
9:00 - 9:10	Welcome
9:10 - 10:10	Opening Plenary: The Power Zone Advantage – How to Find the Time You Need to Optimize Your Law Firm Operations
10.10 10.50	Dready Eyhibitare and The Info Vehance

**10:10 - 10:50** Break, Exhibitors, and The InfoXchange

## CONCURRENT BREAKOUT SEMINARS AND WORKSHOPS

Registrants can watch/attend Seminar A or Seminar B. Workshops are in-person only. All sessions will be available on-demand post-program. Topics subject to change.

	SEMINAR A	SEMINAR B	WORKSHOP
10:50 - 11:45	How to Market Your Firm	How to Provide Trauma- Informed Legal Services in Your Practice (55 m (e))	How to Use AI in Your Practice
11:45 - 11:55	Session Change		
11:55 - 12:40	How to Work with Your Accountant to Manage Income Tax Implications for Your Firm	How to Structure Your Succession/Contingency Plan	How to Enhance the Use of AI in Your Practice
12:40 - 1:40		Lunch (In-Person Attendees) Exhibitors and The InfoXchange	
1:40 - 2:35	How to Manage Your Books and Records	How to Say "No" More (Often) (5 m 🕑)	How to Utilize Your Legal Education
2:35 - 3:15	Break, Exhibitors, and The InfoXchan	ge	
3:15 - 4:15	Closing Plenary: 50 Tips in 50 Minute	es	
4:15 - 4:25	Treasurer's Remarks		
4:25 - 4:30	Closing Remarks and End of Program	1	
4:30 - 6:00	Reception		Register at store.lso.ca/ 19thsolosmall

Session contains EDI content.
Total CPD = 5 h Professionalism (P + 1 h EDI Professionalism (P)
LSO CPD is an Accredited Provider of Professionalism Content.





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JUNE 19 9:00 a.m. - 4:30 p.m.

LIVE IN TORONTO, Metro Toronto Convention Centre, North Building, 255 Front Street West, Toronto or LIVE WEBCAST

## **CO-CHAIRS**



**The Honourable Justice Kathleen Erin Cullin** Ontario Superior Court of Justice



**Barbara Hicks** Hicks & Hicks Professional Corporation



**Jennifer Reynolds** Fresh Legal



Andrew Leroy Rudder Rudder Law Group





8:00 a.m. – 9:00 a.m.	Breakfast, Exhibitors, and The InfoXchange (Room 105)
9:00 a.m. – 9:10 a.m.	Welcome (Room 106)
	The Honourable Justice Kathleen Erin Cullin, Ontario Superior Court of Justice Barbara Hicks, Hicks & Hicks Professional Corporation Jennifer Reynolds, Fresh Legal Andrew Leroy Rudder, Rudder Law Group

Do you have questions for the faculty? Speaking times include 10 minutes for Q & A. To submit questions for the faculty, scan the relevant QR code or use the link below:

## Opening/Closing Plenary and Seminar A Questions



https://bit.ly/19solosemA

#### **Seminar B Questions**



https://bit.ly/19solosemB

## Workshop Questions



https://bit.ly/19solows

## **OPENING PLENARY:** Room 106

## 9:10 a.m. – 10:10 a.m.

## The Power Zone Advantage – How to Find the Time You Need to Optimize Your Law Firm Operations

Solo and small firm legal practitioners are stretched thin – there just aren't enough hours in your day. This energizing session sets the tone for the conference by giving you tools to create the space you need, to do more of the work you love. Our speakers teach you about your Power Zone – a simple framework that helps to transform and focus on your highest-value work. Hear how you can implement the strategies you gain throughout the conference, including for marketing, technology, team building, and succession planning. Learn how to take control of your time and your practice in this engaging and informative session.

Karen Dunn Skinner, Gimbal Consulting David Skinner, Gimbal Consulting

10:10 a.m. – 10:50 a.m. Break, Exhibitors, and The InfoXchange (Room 105)



Please note:

- Registrants can attend or watch either Seminar A or Seminar B.
- Workshops are in-person only, on a first-come, first-served basis. Space is limited.
- All sessions and all workshops will be available on-demand post-program.

## CONCURRENT BREAKOUT SEMINARS AND WORKSHOPS

## BREAKOUT ONE 10:50 a.m. - 11:45 a.m.

### SEMINAR A: Room 106

#### **How to Market Your Firm**

Take your firm's marketing strategy to new heights! Learn how to build client loyalty, broaden your reach, and harness the power of technology and social media to boost your visibility. This session offers an optimal blend of practical advice and creative ideas to help you design a unique and successful marketing plan.

Shaun Bernstein, The Write Stuff AgencyAndrew Leroy Rudder, Rudder Law GroupDamian Williams, Williams Legal Services Professional Corporation

#### OR

#### SEMINAR B: Room 107

#### How to Provide Trauma Informed Legal Services in Your Practice (55 m 9)

Enhance your ability to support clients impacted by trauma with this thoughtful, skills-focussed session. Discover how you can recognize trauma's effects, adapt your communication style when you see it, and maintain a client-centered, empathetic approach to these issues. Our speakers share how you can strengthen your client relationships to make your practice more inclusive and compassionate for clients who confront trauma.

The Honourable Justice Patrice Band, Ontario Court of Justice Lisa Neil, Investigation Counsel, Law Society of Ontario

OR



## WORKSHOP: Room 104BCD (in-person only)

### How to Use AI in Your Practice

Explore the transformative power of technology in this workshop. This beginners' session introduces you to the basics of artificial intelligence. Understand how AI can streamline your workflows, enhance legal research, and improve your client service. Discover how to integrate AI tools into your daily practice with ease, no matter your budget!

Andrew Currier, PCK Intellectual Property Professor Amy Salyzyn, Faculty of Law, University of Ottawa

11:45 a.m. – 11:55 a.m. Session Change

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## BREAKOUT TWO 11:55 a.m. - 12:40 p.m.

## SEMINAR A: Room 106

## How to Work with Your Accountant to Manage Income Tax Implications for Your Firm

Rethink your approach to tax planning and unlock new strategies for managing your firm's finances in this session. Our experienced speakers walk you through how to build a productive partnership with accounting professionals to help you address your tax obligations, avoid common pitfalls, and make informed decisions. This session empowers you to simplify your financial processes so you can focus on what you do best: serving your clients.

**Robert Gauvreau**, Gauvreau Accounting Tax Law Advisory **Anna Naud**, True North Law Professional Corporation

#### OR

#### SEMINAR B: Room 107

#### How to Structure Your Succession/Contingency Plan

Learn about the Law Society's latest succession planning requirements to safeguard your firm's future. Our panel tells you how to design a comprehensive plan that ensures continuity, minimizes risks, and upholds your professional obligations. Gain the tools you need to protect your clients, your practice, and your peace of mind.

Erin Cowling, Flex Legal Network Inc.David Debenham, Low Murchison Radnoff LLPKelly Gerra, Counsel and Manager, Practice Management (Resources), Law Society of Ontario

#### OR

## WORKSHOP: Room 104BCD (in-person only)

#### How to Enhance the Use of AI in Your Practice

Our second Al-focused workshop is tailored for legal professionals ready to go beyond the basics. This session provides you with a deep dive into innovative Al applications, advanced customization strategies, prompt engineering, and cutting-edge tools for efficiency and service. Equip yourself with the expertise you need to stay ahead in today's rapidly evolving legal landscape.

**Melissa Babel**, C.S., Babel Immigration Law Professional Corporation **Danielle A. Douek**, Lerners LLP

12:40 p.m. – 1:40 p.m. Lunch, Exhibitors, and The InfoXchange (Room 105)



## EXHIBITORS

Everyone could use a helping hand. Stop by our Exhibitors (Room 105) to discover products and services that can take your practice to the next level!

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csncanada.com	Cosmolex.ca	E eStatePlanner
LAW CHAMBERS	dyedurham.ca LexisNexis <sup>®</sup>	e-stateplanner.com
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scotiabank.com/lawyers	stewart.ca	virtualassociates.ca
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## BREAKOUT THREE 1:40 p.m. - 2:35 p.m.

### SEMINAR A: Room 106

#### How to Manage Your Books and Records

Stay on top of the Law Society's financial transactions rules and records requirements with this practical session. Learn how to set up efficient bookkeeping systems, reconcile trust accounts effectively, and avoid common pitfalls. Gain the skills you need to uphold the highest standards of financial integrity and maintain full compliance.

**Deborah Loh,** Spot Auditor, Practice Audits, *Law Society of Ontario* **Jacques Tjonasan**, *Accounting for Law* 

#### OR

#### SEMINAR B: Room 107

#### How to Say "No" More (Often) (5 m<sup>(G)</sup>)

Burn-out isn't inevitable. Learn how setting healthy professional boundaries can help you reclaim your time and energy, keep your file load manageable, and preserve your work-life balance. Gain the confidence you need to respectfully decline tasks and requests that jeopardize your balance and well-being, while you maintain your professional relationships.

Ashleigh Frankel, The WiseMind Collective Lara Wellman, The Biz Studio

#### OR

## WORKSHOP: Room 104BCD (in-person only)

#### How to Utilize Your Legal Education

Expand your horizons! Our final workshop delves into diverse career paths available to those with a law degree or paralegal degree/diploma. Discover opportunities *beyond* traditional legal practice and learn how to leverage your skills into new fields in business, advocacy, academia, EDI, alternative dispute resolution, and more.

Lisa Barazzutti, Barazzutti Strybos Jeff Carolin, Barrister & Solicitor Deborah Moriah, Moriah Paralegal



2:35 p.m. – 3:15 p.m. Break, Exhibitors, and The InfoXchange (Room 105)



Make sure your first impression is a great one! Visit our on-site photographer to get your professional headshot today.

Registrants will receive an email to book an appointment, on a first-come, first-served basis. Didn't get an appointment? Visit the photographer's booth on program day for availability.



Have a question in mind? Look to the people at The InfoXchange for the answer! (Room 105)





## CLOSING PLENARY: Room 106

## 3:15 p.m. – 4:15 p.m.

## 50 Tips in 50 Minutes

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Wrap up your Solo/Small Firm day with a rapid-fire panel full of practical gems. Gain actionable strategies to manage your practice better, improve your communication, optimize your finances, and more. This closing plenary delivers powerful insights in record time to help you and your practice thrive!

Beau Atkins, Evolve Law Phil Brown, Director, Practice Supports and Resources, Law Society of Ontario Vladimira Ivanov, Ivanov Katz LLP

4:15 - 4:25 p.m.	Treasurer's Remarks
	Treasurer Peter Wardle, Law Society of Ontario
4:25 - 4:30 p.m.	Closing Remarks and End of Program
4:30 p.m. – 6:00 p.m.	<b>Reception</b> (pre-function space outside of 105/106)





# Think you missed a program?

## Check out our replays!







**Register** at store.lso.ca



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