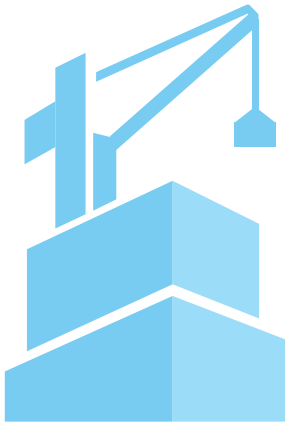


# AGENDA



## 20th SOLO & SMALL FIRM CONFERENCE

**BUILDING YOUR FUTURE-READY FIRM**







# 20th SOLO & SMALL FIRM CONFERENCE

BUILDING YOUR FUTURE-READY FIRM

JUNE 5

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

LIVE IN TORONTO

The Conference Centre, University of Toronto  
or LIVE WEBCAST

## CO-CHAIRS



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



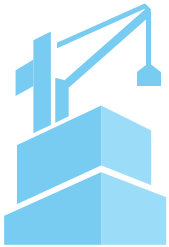
**Barbara Hicks**  
*Hicks & Hicks  
Professional Corporation*



**Andrew Leroy Rudder**  
*Rudder Law Group*



**Samantha Seabrook**  
*Seabrook Workplace Law*



# 20th SOLO & SMALL FIRM CONFERENCE

BUILDING YOUR FUTURE-READY FIRM

JUNE 5

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

## AGENDA AT-A-GLANCE

- 8:00 - 9:00** Breakfast and Exhibitors (Ballroom West, 2nd Floor), and The InfoXchange (2nd Floor Foyer)

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- 9:00 - 9:10** Welcome (Ballroom East and Centre, 2nd Floor)

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- 9:10 - 10:10** Opening Plenary: Building Your Future-Ready Firm (Ballroom East and Centre, 2nd Floor)

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- 10:10 - 10:45** Break and Exhibitors (Ballroom West, 2nd Floor), and The InfoXchange (2nd Floor Foyer)

## CONCURRENT BREAKOUT SEMINARS AND WORKSHOPS

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

	<b>SEMINAR A</b> (Ballroom East and Centre, 2nd Floor)	<b>SEMINAR B</b> (Giovanni Room, 2nd Floor)	<b>WORKSHOPS</b> (University Room, 3rd Floor – In-Person Only – Seating Is Limited)
<b>10:45 - 11:40</b>	Practice Check-Up: Smart Systems for Running Your Business	From Solo to Supported: Hiring and Training that Works (5 m <b>e</b> )	AI in Action: Tools that Transform Your Practice
<b>11:40 - 11:50</b>	<i>Session Change</i>		
<b>11:50 - 12:45</b>	Retainers that Work: Clarity, Protection, and Peace of Mind	Lean, Smart, & Profitable: Managing your Firm's Overhead	Beyond Basics: Marketing Your Firm in a Challenging Digital Landscape
<b>12:45 - 1:45</b>	<i>Lunch (In-Person Attendees) and Exhibitors (Ballroom West, 2nd Floor) The InfoXchange (2nd Floor Foyer)</i>		
<b>1:45 - 2:40</b>	Neurodiversity and the Modern Lawyer: Awareness, Advocacy, and Practice Tips (55 m <b>e</b> )	Managing Risk and Responsibility When Using AI in Your Practice	Mastering Difficult Conversations: Live Skills Lab
<b>2:40 - 3:15</b>	Break and Exhibitors (Ballroom West, 2nd Floor), and The InfoXchange (2nd Floor Foyer)		
<b>3:15 - 4:15</b>	Closing Plenary: 50 Tips in 50 Minutes (Ballroom East and Centre, 2nd Floor)		
<b>4:15 - 4:25</b>	Treasurer's Remarks (Ballroom East and Centre, 2nd Floor)		
<b>4:25 - 4:30</b>	Closing Remarks and End of Program (Ballroom East and Centre, 2nd Floor)		
<b>4:30 - 6:00</b>	Reception (Ballroom West, 2nd Floor)		

Register at  
[store.iso.ca/20thsolosmall](https://store.iso.ca/20thsolosmall)

**e** = Session contains EDI content.

**Total CPD = 5 h Professionalism **P** + 1 h EDI Professionalism **e****

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# EXHIBITORS

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Learn more at [nojumi.com](https://nojumi.com)

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# AGENDA

**8:00 a.m. – 9:00 a.m.** Breakfast and Exhibitors (Ballroom West, 2nd Floor), and The InfoXchange (2nd Floor Foyer)

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**9:00 a.m. – 9:10 a.m.** **Welcome** (Ballroom East and Centre, 2nd Floor)

**The Honourable Justice Kathleen Erin Cullin**, *Ontario Superior Court of Justice*  
**Barbara Hicks**, *Hicks & Hicks Professional Corporation*  
**Andrew Leroy Rudder**, *Rudder Law Group*  
**Samantha Seabrook**, *Seabrook Workplace Law*

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

**Opening/Closing Plenary  
and Seminar A Questions**



<https://bit.ly/2OsoloA>

**Seminar B Questions**



<https://bit.ly/2OsoloB>

## OPENING PLENARY: Ballroom East and Centre, 2nd Floor

**9:10 a.m. – 10:10 a.m.**

### **Building Your Future-Ready Firm**

What will your legal service practice look like in five years? In 10 years? The time to plan is now. Hear from our distinguished panel of speakers on what to consider as technology tools, AI, client expectations, and legal needs continue to evolve. This session sets the stage for the rest of the conference as we dive into how solo and small firm practitioners are positioned to define (and refine) their future-ready firm.

**Rajen Akula**, *Akula Law*

**Phil Brown**, Director, Practice Supports and Resources, *Law Society of Ontario*

**Colin LaChance**, *PGYA Consulting*

**Professor Ed Walters**, Co-founder and Former CEO, *Fastcase*

**Professor David Whelan**, *University of Illinois Chicago Law*

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**10:10 a.m. – 10:45 a.m.** Break and Exhibitors (Ballroom West, 2nd Floor), and The InfoXchange (2nd Floor Foyer)

# AGENDA

Please note:

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

## CONCURRENT BREAKOUT SEMINARS AND WORKSHOPS

### BREAKOUT ONE 10:45 a.m. – 11:40 a.m.

#### SEMINAR A: Ballroom East and Centre, 2nd Floor

##### Practice Check-Up: Smart Systems for Running Your Business

Take a practical look at how your firm runs and how smarter systems can enhance efficiency, professionalism, and client care. This session helps lawyers and paralegals evaluate and strengthen their practice through streamlined workflows, effective team collaboration, and practical use of technology and AI. Speakers explore ways to standardize key processes, improve scheduling and communication, and leverage templates and tech tools to reduce administrative burden. Walk away with actionable ideas that you can implement immediately to build a more resilient, future-ready practice.

**Margeaux Peck**, Counsel, Practice Review, Practice Audits, *Law Society of Ontario*  
**Maureen Silcoff**, *Silcoff Shacter*

OR

#### SEMINAR B: Giovanni Room, 2nd Floor

##### From Solo to Supported: Hiring and Training that Works (5 m<sup>e</sup>)

For solo and small firm practitioners, growth is often driven by two pivotal questions: When to bring in help and how best to approach the recruit. Moving from working alone to building a supported practice can transform your workload and strengthen the long-term sustainability of your firm. This session explores practical strategies for hiring and training lawyers, paralegals, and support staff in a way that builds up your practice. Hear how you can develop efficient onboarding and training processes and learn how to identify the right moment to hire, define roles that truly add value, and recruit talent that aligns with your firm's culture and future goals.

**Joy Mathews**, *Mathews Condo Law Professional Corporation*  
**Ted Panagiotoulis**, *Seabrook Workplace Law*

OR

**WORKSHOP:** University Room, 3rd Floor – In-Person Only – Seating is limited

## AI in Action: Tools that Transform Your Practice

Discover how AI is already changing day-to-day legal practice and explore how you can use it effectively and responsibly. This practical session looks at real-world AI tools that support legal drafting, legal research, and practice management. Participants gain practical tips on integrating AI into everyday workflows to improve efficiency while meeting professional obligations. If you are looking to better understand what AI can do for you today, join this workshop to begin building a confident approach to technology.

**Beau Atkins**, *Evolve Law*

**Nicole Biros-Bolton**, *Bird Bolt Law*

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**11:40 a.m. – 11:50 a.m.**    **Session Change**

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# Think you missed a program?



Check out  
our replays!

## BREAKOUT TWO 11:50 a.m. – 12:45 p.m.

### SEMINAR A: Ballroom East and Centre, 2nd Floor

#### Retainers that Work: Clarity, Protection, and Peace of Mind

Clear, well-drafted retainer agreements are a cornerstone of competent and ethical legal practice. This is particularly true for solo and small firm lawyers and paralegals, where risk management and client relationships are intertwined. Our speakers examine how you can refine your retainer agreements to enhance transparency, manage expectations, clearly define scope and fees and reduce the risk of misunderstandings, complaints, claims, and fee disputes. They also highlight common pitfalls and best practices for drafting, updating, and communicating the terms of a retainer in a way that supports trust and professionalism. Hear why retainer agreements are more than an administrative formality and how you can use them to protect both yourself and your clients.

**Elena Roizen**, Paralegal, *Adesse Legal Services Professional Corporation*

**Sarita Samaroo**, *SST Law Professional Corporation*

**Safiyya Vankalwala**, PracticePRO Manager & Counsel, *Lawyers' Professional Indemnity Company (LAWPRO®)*

OR

### SEMINAR B: Giovanni Room, 2nd Floor

#### Lean, Smart, & Profitable: Managing Your Firm's Overhead

Managing overhead is an ongoing responsibility for solo and small firm lawyers and paralegals. This session looks at how practitioners can take an active, strategic role in overseeing firm expenses, operational choices, and resource allocation while effectively leveraging financial advisors as part of their professional support team. Speakers explore how to work collaboratively with advisors to understand the business impact of everyday practice decisions: assessing staffing needs, space requirements, technology, and service models to make informed trade offs that support efficiency and sustainability. Learn how clear oversight, informed questioning, and proactive management can help you keep your firm lean, responsive, and profitable without losing sight of client service or professional obligations.

**Klaudia Hideg**, *JC Financial Services*

**Lisa Stam**, *Springlaw*

**Sarah Young**, *Beaton Burke Young LLP*

OR

### WORKSHOP: University Room, 3rd Floor – In-Person Only – Seating is limited

#### Beyond Basics: Marketing Your Firm in a Challenging Digital Landscape

The marketing of legal services has changed dramatically in recent years. In this forward-thinking session, speakers look beyond traditional approaches to explore modern strategies and digital tools that help you attract and retain clients. Learn how to clearly identify your target market, make the most of your marketing budget, and measure what's working from these efforts. Our speakers equip you with practical techniques to implement a workable marketing approach for your firm.

**Carl Alphonse**, *Alphonse Latham LLP*

**Filip Bartos**, Director of Marketing, *Mediaforce™*

**Joe Bongiorno**, President & Founder, *Mediaforce™*

**Andrew Leroy Rudder**, *Rudder Law Group*

# AGENDA

12:45 p.m. – 1:45 p.m. Lunch and Exhibitors (Ballroom West, 2nd Floor), and  
The InfoXchange (2nd Floor Foyer)

## BREAKOUT THREE

1:45 p.m. – 2:40 p.m.

### SEMINAR A: Ballroom East and Centre, 2nd Floor

#### Neurodiversity and the Modern Lawyer: Awareness, Advocacy, and Practice Tips (55 m<sup>e</sup>)

Neurodiversity is an increasingly important aspect of conversations about wellness, inclusion, and effective practice within the legal professions. This session explores what neurodiversity means in the context of modern legal service practices and why greater awareness of neurodiversity benefits individuals, firms, and clients alike. Through a practical lens, you learn how to foster more inclusive working environments, advocate effectively for yourself and others, and implement simple practice tips that support productivity, professionalism, and well-being.

**Monica Chohan**, *Chohan Law Professional Corporation*

**Dr. Gurdeep Parhar**, *Adult ADHD Centre and Adult Autism Centre*

**Stephanie Sutherland**, *Cohen Highley LLP*

OR

### SEMINAR B: Giovanni Room, 2nd Floor

#### Managing Risk and Responsibility When Using AI in Your Practice

Artificial intelligence tools are quickly becoming part of everyday legal service practices, as they can assist with drafting, research, client intake, document review, and practice management efforts. While AI offers efficiency and competitive benefits, it also raises important professional, ethical, and operational considerations. This session explores how to use AI tools responsibly while meeting obligations around competence, confidentiality, privacy, supervision, and accountability. Speakers provide practical guidance on managing AI-related risks, understanding who remains responsible for AI-assisted work, and implementing policies and safeguards to support ethical and compliant use. The session also addresses how to communicate transparently with clients about how you use AI and how to prepare your firm for evolving regulatory expectations associated with AI.

**Nicole Biros-Bolton**, *Bird Bolt Law*

**Allan Oziel**, *Oziel Law*

OR

### WORKSHOP: University Room, 3rd Floor – In-Person Only – Seating is limited

#### Mastering Difficult Conversations: Live Skills Lab

Difficult conversations are inevitable in legal practice—whether with clients, colleagues, opposing counsel, or staff. Handling them confidently and constructively is a crucial skill for building a resilient, future-ready firm. In this highly interactive workshop, participants move beyond theory. Through real-time demonstrations and facilitated discussion, you learn practical communication strategies to navigate high-stakes, emotionally charged or conflict-laden conversations with professionalism and clarity. You leave with tools that you can immediately use in your practice, whether you are managing conflict or addressing performance issues in your firm.

**Kerry Knickle**, *mp-plus*

**Nancy McNaughton**, *mp-plus*

# AGENDA

2:40 p.m. – 3:15 p.m.

Break and Exhibitors (Ballroom West, 2nd Floor), and  
The InfoXchange (2nd Floor Foyer)



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## CLOSING PLENARY: Ballroom East and Centre, 2nd Floor

**3:15 p.m. – 4:15 p.m.**

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

Wrap up your Solo/Small Firm day with a fast-paced panel full of practical takeaways. Panelists share insights on how to manage your practice more efficiently, communicate more effectively with clients, and make smarter financial choices (and give you some fun tips for good measure). Buckle-up—this closing plenary delivers more than its share of useful information 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*

**Jennifer Reynolds**, *Fresh Legal*

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**4:15 p.m. – 4:25 p.m.**

### **Treasurer's Remarks**

**Neha Chugh**, *Chugh Law Professional Corporation*

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**4:25 p.m. – 4:30 p.m.**

### **Closing Remarks and End of Program**

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**4:30 p.m. – 6:00 p.m.**

### **Reception (Ballroom West, 2nd Floor)**



