

# 19th Solo and Small Firm Conference: The How-To Toolkit



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*

**June 19, 2025**

**9:00 a.m. to 4:30 p.m.**

**Total CPD Hours = 5 h Professionalism  + 1 h EDI Professionalism **

**Metro Toronto Convention Centre (MTCC)  
North Building, Level 100  
255 Front St. W.  
Toronto, ON**

**Live In-person and Webcast**

**SKU CLE25-00604**

## **Agenda**

### **Room 105**

**8:00 a.m. – 9:00 a.m.**

**Breakfast, Exhibitors, and The InfoXchange**

## Room 106

9:00 a.m. – 9:10 a.m.

### Welcome

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*

**Note:** Included as part of each session is 10 minutes for question and answer.

## Room 106

9:10 a.m. – 10:10 a.m.

### OPENING PLENARY: 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*

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## Room 105

10:10 a.m. – 10:50 a.m.

### Break, Exhibitors, and The InfoXchange

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## **CONCURRENT BREAKOUT SEMINARS AND WORKSHOPS**

*Registrants can watch/attend Seminar A & Seminar B. Workshops are in-person only.*

**All sessions will be available on-demand post-program.**

### **BREAKOUT ONE**

#### **Seminar A – Room 106**

**10:50 a.m. – 11:45 a.m.      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 Agency*

Andrew Leroy Rudder, *Rudder Law Group*

Damian Williams, *Williams Legal Services Professional Corporation*

**OR**

#### **Seminar B – Room 107**

**10:50 a.m. – 11:45 a.m.      How to Provide Trauma-Informed Legal Services in Your Practice  
(55 m )**

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**

**10:50 a.m. – 11:45 a.m.      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*

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**Session Change**

**11:45 a.m. – 11:55 a.m.**

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## **BREAKOUT TWO**

**Seminar A – Room 106**

**11:55 a.m. – 12:40 p.m.      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**

**11:55 a.m. – 12:40 p.m.**

**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 LLP*

Kelly Gerra, Counsel and Manager, Practice Management  
(Resources), *Law Society of Ontario*

OR

**Workshop – Room 104BCD**

**In-Person Only**

**11:55 a.m. – 12:40 p.m.**

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

Our second AI-focused workshop is tailored for legal professionals ready to go beyond the basics. This session provides you with a deep dive into innovative AI 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*

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**Room 105**

**12:40 p.m. – 1:40 p.m.**

**Lunch (In-Person Attendees)  
Exhibitors and The InfoXchange**

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## **BREAKOUT THREE**

### **Seminar A – Room 106**

**1:40 p.m. – 2:35 p.m.**

#### **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**

**1:40 p.m. – 2:35 p.m.**

#### **How to Say “No” More (Often) (5 m ☺)**

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**

**1:40 p.m. – 2:35 p.m.**

#### **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*

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**Room 105**

**2:35 p.m. – 3:15 p.m.**      **Break, Exhibitors, and The InfoXchange**

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**Room 106**

**3:15 p.m. – 4:15 p.m.**      **CLOSING PLENARY: 50 Tips in 50 Minutes**

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 p.m. – 4:25 p.m.**      **Treasurer's Remarks**

Treasurer Peter Wardle, *Law Society of Ontario*

**4:25 p.m. – 4:30 p.m.**      **Closing Remarks**

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**4:30 p.m.**      **End of Program**

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**4:30 p.m. – 6:00 p.m.**      **Reception**