



# GLSA Annual Conference September 15-17, 2022

Join **Group Legal Services Association**  
in the heart of the French Quarter in  
New Orleans, Louisiana  
GLSA ~ an organization whose  
members are committed to  
**Access to Justice**

*Early Bird* registration  
rate available until  
**August 1, 2022**

## **YOUR REGISTRATION FEE INCLUDES:**

- Thursday, Friday and Saturday Breakfasts
- Opening Welcome Cocktail Reception
- Friday State of the Industry Session
- Friday Awards Luncheon
- Friday Networking Event and Cocktail Reception
- Hospitality Suite
- Over Fifteen (15) CLE Education Sessions
- Refreshment Breaks throughout the Conference

***Attorneys!***  
Network with Legal Plans  
while obtaining  
CLEs!

***Legal Plans!***  
Register for a space to exhibit  
and recruit  
new attorneys!

## CONFERENCE SCHEDULE

**Thursday, 9/15/22**

|                 |   |
|-----------------|---|
| 7:00am-5:00pm   | Registration  |
| 7:30am-8:30am   | Deluxe Breakfast-Conference Begins                            |
| 9:00am-10:00am  | CLE session - <i>LPI-Legal Plans Outside the US</i>           |
| 10:00am-11:00am | CLE session - <i>Weaponizing Consumer Arbitration</i>         |
| 11:00am-11:15am | Networking Break  |
| 11:15am-12:15pm | CLE session - <i>Winning Probate Disputes</i>                 |
| 12:15pm-1:15pm  | Lunch on your own   |
| 1:15pm-2:15pm   | CLE session - <i>Is Blockchain the Savior of Free Speech?</i> |
| 2:15pm-3:15pm   | CLE session - <i>Improving Member Satisfaction-Why Care?</i>  |
| 3:15pm-3:30pm   | Networking Break  |
| 3:30pm-4:30pm   | CLE session - <i>Gun Rights &amp; Marijuana Laws Panel</i>    |
| 4:30pm-5:30pm   | CLE session - <i>Bankruptcy Update</i>                        |
| 5:30pm-7:00pm   | Opening Welcome Cocktail Reception                            |

**Friday, 9/16/22**

|                 |  |
|-----------------|--|
| 7:00am-5:00pm   | Registration   |
| 7:30am-8:30am   | Deluxe Breakfast   |
| 8:30am-10:00am  | State of the Industry  |
| 10:00am-10:15am | Networking Break   |
| 10:15am-11:15am | CLE session- <i>Embracing Tech to Practice Virtually &amp; Reduce Mistakes</i> |
| 11:15am-12:15pm | CLE session- <i>MetLife-Access to Justice and Other Subjects</i>               |
| 11:15am-12:15pm | CLE session- <i>ERISA Update</i>   |

## NETWORKING

A CONFERENCE FILLED WITH NETWORKING OPPORTUNITIES FOR ATTORNEYS, LEGAL PLANS, TECH COMPANIES AND ALL THOSE COMMITTED TO ACCESS TO JUSTICE!



## CONFERENCE SCHEDULE

(continued)

### Friday, 9/16/22 (continued)

|                |  |
|----------------|--|
| 12:15pm-1:15pm | CLE session-The Basics of Mechanics Liens & Construction Legal Plans |
| 1:15pm-2:30pm  | Luncheon and Awards Presentation                                     |
| 2:30pm-3:30pm  | CLE session -Profitability Modeling in Small and Solo Law Firms      |
| 3:30pm-4:30pm  | CLE session-Diversity in the Law                                     |
| 4:30pm-5:30pm  | CLE session-Roundtable-Trusts, Plans & Attorneys                     |
| 6:00pm-7:00pm  | Networking Event and Cocktail Reception                              |
| 7pm            | Dinner in NOLA on your own   |

### Saturday, 9/17/22

|                 |   |
|-----------------|---|
| 8:00am-12:00pm  | Registration  |
| 8:00am-9:00am   | Breakfast   |
| 9:00am-10:00am  | CLE session -Ethical Issues for Lawyers When Doing Business with Non-Lawyer Third Party Payors & Marketers            |
| 10:00am-10:15am | Networking Break  |
| 10:15am-11:15am | CLE session - Be the Lawyer (Law Firm) You Want to Be   |
| 11:15am-12:00pm | New GLSA Board Meeting  |
| 12:00pm         | Optional Activities:<br><br>Luncheon on a New Orleans Riverboat<br>Culinary Walking Tour of New Orleans<br>Swamp Tour |
| 12:00pm         | Conference Ends   |

## ACCOMODATIONS

### THE FRENCH QUARTER'S MOST CELEBRATED VENUE- HOTEL MONTELEONE



THE FRENCH QUARTER BEGINS IN THE LOBBY OF HOTEL MONTELEONE. THIS VENERABLE HOTEL SITS MAJESTICALLY AT THE FOOT OF ROYAL STREET!



THE FAMOUS CAROUSEL BAR & LOUNGE IN THE HOTEL MONTELEONE IS A LONG-TIME FAVORITE NEW ORLEANS HOT SPOT~ THE CITY'S ONLY REVOLVING BAR.



**Hotel Monteleone-  
New Orleans, Louisiana**  
[Click here](#) to book your stay!

## CLE EDUCATION SESSIONS

### **Legal Plans Outside the US and How They Work**

Legal Protection International aisbl, a strategic partner of GLSA will share with conference attendees the legal landscape in Europe, including EU law, national law, insurance law and the regulation of the legal profession and legal services market. The session will examine the factors that shape insurers' business models and how insurers meet consumers' needs, as well as an analysis of legal plans versus legal protection insurance.

*Presenter: Antje Fedderke, Legal Protection Int'l aisbl*

### **Weaponizing Consumer Arbitration**

Almost every consumer contract contains an arbitration clause and class action waiver. AAA and JAMS have recently changed the rules lowering the barrier to entry for consumers who want to arbitrate claims against consumer facing companies. By harnessing federal and state consumer protection statutes with fee shifting, consumer arbitration can provide a more attractive forum for litigants and lawyers alike. Attend and learn how.

*Presenters: Marc Dann, Advocate Attorneys LLP and The Dann Law Firm and Ryan Galloway, Advocate Attorneys LLP*

### **Winning Probate Disputes**

Almost 20 percent of the United States population will be over 65 in 2022, and 75% of the country's wealth is owned by people over age 50. These demographics will inevitably drive the increase in disputes over wealth transfers at death. This presentation will provide an overview of the law, with practical advice on how to successfully prevail in these cases. Hypotheticals will be used, based on real cases, which will prove to be entertaining, educational, and practical.

*Presenter: Robert Bancroft, Robert H. Bancroft, Attorney, P.C.*

### **Is Blockchain the Savior of Free Speech?**

As owning digital assets becomes more the norm, estate plans need to employ new strategies. In this session we'll define what digital assets are and cover their growing prevalence. Attendees will hear why digital asset planning is important and will learn about the steps necessary to incorporate digital assets into estate plans.

*Presenter: Michael E. Fiffik, Esq. Fiffik Law Group, P.C.*

### **Improving Member Satisfaction-Why Care?**

Member satisfaction is key to retention and plan growth. Attendees will learn the three R's of member satisfaction, as well as how to gain an understanding of member expectations. We will discuss how to achieve high member satisfaction and how to make sense of survey responses, reviews, and member satisfaction scores. Finally, we will address getting the most out of your team. To whom does the future belong?

*Presenter: Richard Kort, Sr. PPLSI / LegalShield*

### **Marijuana Laws & Gun Rights**

Almost every state in the country has passed laws allowing its citizens to use marijuana for medicinal purposes. However, this legalization has not been without controversy or unintended legal consequences. This presentation will explore those legal implications ranging from drug testing in the employment context to driving while intoxicated in criminal proceedings, and the interplay between state and federal law. Next, the panel will address the most recent legislation on gun control, the impact this ever-changing environment has in the US, as well as what to expect in the next year.

*Presenters: Janell M. Stanton, Wagner, Falconer & Judd, Ltd. Joyce Smithey, Smithey Law Group and Benjamin H. Farrow, The Anderson Law Firm LLC*

### **Bankruptcy Update**

A comprehensive look at the bankruptcy landscape post-Covid. Learn how the pandemic and the responding government programs affected Chapter 7, 11 and 13 filings. Where are we two and a half years after the initial shutdown? Next, we examine the most recent filing on the bankruptcy front: Subchapter V. Which debts are dischargeable and which are not? What impact will the recent amendments to the Act have? A don't miss session!

*Presenter: Matthew R. Hahne, Boleman Law Firm*

## **ATTORNEYS!**

Remember to indicate the states in which you seek CLE credit so the proper applications can be made.

## CLE EDUCATION SESSIONS

### **State of the Industry**

GLSA's uniquely dynamic discussion between legal plans and network attorneys. What is new on the Access to Justice landscape? Attend and listen, as well as offer your perspective. Two For One-Education, as well as Networking!

*Panelists: Legal Plans, Attorneys, Tech Firms and You!*

### **Embracing Technology to Practice Virtually & Reduce Mistakes – Key Skills for Lawyers to Improve Efficiency & Quality of Service**

An overview of various kinds of technologies which can help improve the quality, efficiency, cost and client satisfaction, while allowing you and your staff to work from anywhere in the world with an internet connection. We will discuss the technology that you, as an attorney, should be familiar with and embrace in your day-to-day operations and discuss platforms, operating systems, practice management software, communications tools, virtual meeting platforms, cameras, microphones, printers, scanners, faxes and various accessories that can improve your company/practice.

*Presenter: Alexander Paykin, Esq., The Law Office of Alexander Paykin, P.C.*

### **MetLife Session**

Join MetLife as it examines the latest in the Access to Justice landscape through its unique lens.

### **ERISA Update**

In April, 2021, The Department of Labor issued guidance for plan sponsors, fiduciaries, record keepers, and plan participants on best practices for ensuring cybersecurity. Through case studies, we will examine the DOL Guidance: Cybersecurity Best Practices, including:

- ◆ Selecting and Monitoring Plan Service Providers
- ◆ Cybersecurity Best Practices for Plan Fiduciaries and Record-Keepers
- ◆ Online Security Tips for Plan Participants and Beneficiaries

*Presenter: Katherine A. Hesse, Murphy, Hesse, Toomey & Lehane, LLP*

### **The Basics of Mechanics Liens & Construction Legal Plans**

A review of the use and process of a mechanics lien-the involuntary security interest granted by law. How does it secure payment and what are the steps in the process? This session will look at the history and development of lien laws and share how to effectively enforce a lien.

*Presenter: Seth Bloom, Levelset, a Procore Company*

### **Profitability Modeling in Small & Solo Law Firms**

How can profitability modeling be used to drive meaningful change in how law firms operate, including how group legal plans can drive profits? Profitability modeling can help small & solo law firms pull the right levers to improve margins.

*Presenter: Wayne Hassay, Maguire Schneider Hassay*

### **Legal Profession and Diversity**

Diversity Requires More Than Talk.. What does it mean to be truly diverse and inclusive? This session will offer an effective Plan of Action for your law firm or company.

*Presenter: Lindsay N. Greene, DSK Law*

### **Roundtable-Trustees, Plans, Legal Tech & Attorneys**

A new and exciting roundtable session which will address questions and case studies in a small group setting. Created to educate and offer effective networking at the same time, this hour is a must attend, a "do not miss!" for legal plans, trustees, attorneys and all firms interested in access to justice!

*Presenters: You!*

### **Ethical Issues for Lawyers When Doing Business with Non-Lawyer Third Party Payors & Marketers**

Legal & Business Ethics Including but Not Limited To: Competence, Scope of Representation, Diligence, Communications, Fees, Confidentiality of Information, Conflict of Interest with Current Clients, Duties to Former Clients, Imputation of Conflicts of Interest: General Rule, Declining or Terminating Representation, Advisor -Lawyer's Role As Communications Concerning a Lawyer's Services and Solicitation of Clients

*Presenter: Matthew Wade Torres, Esq. Babun & Torres, P.A.*

### **Be the Lawyer (Law Firm) You Want to Be**

Dealing with office logistics, staff hiring, finance, and marketing takes time away from what lawyers were trained to do: practice law. How do lawyers get back to practicing law and bringing in clients?

This session will share data and strategies on modernizing your law firm's operations, marketing, finance, and IT, and how these strategies will help you grow your bottom line and personal freedom.

*Presenter: Thomas Dunlap, Dunlap Bennett & Ludwig*

# UNIQUE EXHIBITOR & SPONSORSHIP OPPORTUNITIES

## CONFERENCE EXHIBITORS

Exhibit at the conference and take advantage of ALL the year-long,, extended exposure!

Check out the benefits in GLSA's Annual Sponsorship Brochure. Click Here: [Events](#) page

## CONFERENCE SPONSORS

Enjoy a special designation as a conference sponsor, as well as recognition at the conference, including a listing in all the conference materials!

|                                      |   |
|--------------------------------------|---|
| LANYARDS                             | Capture attention with your company name/logo around each attendee's neck! \$750  |
| BADGES                               | Your firm's name/logo will adorn each member—sponsor the badges and the exposure will be great! \$1,000   |
| CLE SESSIONS                         | Your firm's name will be featured on signage outside one of the fifteen (15) CLE sessions planned at the conference! Plus, all CLE sponsors will also be featured on all conference materials! \$500  |
| OPENING NIGHT WELCOME RECEPTION      | Welcome attendees by sponsoring a bar during the opening night welcome reception on Thursday evening! Company name/logo featured on table tents, cocktail napkins and all conference materials! \$2,500   |
| FRIDAY AWARDS LUNCHEON               | Your firm will be the WINNER when its name/logo are featured on each table at the prestigious Friday Awards Luncheon. Company name/logo on signage and all conference materials as well! \$1,500  |
| NETWORKING EVENT/ COCKTAIL RECEPTION | Network in high gear! Support GLSA and Access to Justice by sponsoring Friday's Networking Event and Cocktail Reception. Take the opportunity to put your company's name/logo on a uniquely fun event which will make all members remember your company! <b>SOLD OUT!</b> |
| NETWORKING BREAKS                    | Attendees love to network between sessions! Spotlight your firm by sponsoring one of the many coffee and/or snack breaks throughout the meeting. Company name/logo on signage and all conference materials! \$500   |
| THURSDAY BREAKFAST                   | Start everyone's day out right by sponsoring the deluxe breakfasts on Thursday or Friday! Company name/logo featured on table tents on each table, as well as on signage and all conference materials. \$1,000  |
| FRIDAY BREAKFAST                     |   |
| SATURDAY BREAKFAST                   | Leave the attendees with a lasting impression by sponsoring Saturday morning's breakfast before members hit the road! Company name/logo on table tents, signage and all conference materials! \$1,000   |
| PROMOTIONAL INFO                     | We will place your firm's promotional materials in our conference materials for maximum exposure to our membership. \$1,500   |
| TABLE PLACEMENT                      | For even more exposure, we will place your firm's promotional materials on each table for the duration of the conference sessions! \$2,000  |
| OPTIONAL ACTIVITIES                  | Amazing opportunities to showcase your firm! Contact <a href="mailto:awaggoner@glsonline.org">awaggoner@glsonline.org</a> for details and pricing.  |

# REGISTRATION FORM

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Title: \_\_\_\_\_ Name on Badge: \_\_\_\_\_

Company /Firm \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ ST: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

\_\_\_\_\_ Bill to Card type: \_\_\_\_\_ Name on Card \_\_\_\_\_

Card # \_\_\_\_\_ Exp date: \_\_\_\_\_ Code \_\_\_\_\_

Billing address: \_\_\_\_\_ City: \_\_\_\_\_ ST: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Amount to be charged on card \$ \_\_\_\_\_ Signature: \_\_\_\_\_

**Please list state (s) in which you seek CLEs:**

- Your Registration Fee Includes:**
- Thursday, Friday and Saturday Breakfasts
  - Opening Welcome Cocktail Reception
  - Friday State of the Industry Session
  - Friday Awards Luncheon
  - Friday Networking Event and Cocktail Reception
  - Over Fifteen (15) CLE Education Sessions
  - Hospitality Suite
  - Refreshment Breaks throughout the Conference

**Cancellation Policy**  
Full refunds will be given if notification is submitted in writing prior to July 31, 2022. Cancellation notices received between August 1 and Aug 31, 2022 will receive a 50% refund.  
Cancellation notices received on or after Sept. 1, 2022 will unfortunately not receive a refund.

**Hotel**  
The conference will be held at the **Hotel Monteleone**. A limited number of rooms have been blocked at a special conference rate of \$249 per night. [Click here](#) or visit our Events Page for the link to book your stay. Phone: (504) 523-3341

**Special Requests**  
Accessibility: \_\_\_\_\_  
\_\_\_\_\_  
Dietary Requirements: \_\_\_\_\_  
\_\_\_\_\_

**Payment**  
Visit [www.glsaonline.org](http://www.glsaonline.org) and click on "Annual Conference" to register online with your credit card.  
OR complete the form above and mail with your check to: Group Legal Services Assoc-GLSA, PO Box 1693, Arlington Heights, IL 60006

**Conference Fees**

|               |                |       |   |          |       |
|---------------|----------------|-------|---|----------|-------|
| Members       | (until 8/1/22) | _____ | @ | 695.00 = | _____ |
|               | (after 8/1/22) | _____ | @ | 745.00 = | _____ |
| Social guests |                | _____ | @ | 595.00 = | _____ |
|               | Guest Name:    | _____ |   |          |       |
|               | Guest Name:    | _____ |   |          |       |

Non-members: \_\_\_\_\_ @ 995.00 = \_\_\_\_\_

**Optional Events:**

|                               |       |   |          |   |       |
|-------------------------------|-------|---|----------|---|-------|
| Choice of Sponsorship-        | _____ | @ | _____    | = | _____ |
| Riverboat Luncheon            | _____ | @ | 125.00 = |   | _____ |
| Walking Culinary Tour of NOLA | _____ | @ | 100.00 = |   | _____ |
| Swamp Tour                    | _____ | @ | 100.00 = |   | _____ |

**Processing Fee**  
(for credit card payments) \_\_\_\_\_ **25.00**  
**Total \$** \_\_\_\_\_