



ATTORNEY MARKETING WITH A \$500 ANNUAL BUDGET

By Frank Ramos

Let's say you have a paltry marketing allotment for the year – \$500. You can't attend a single out of town conference for that much. Some organizations' membership dues are more than \$500. What can you possibly do with \$500? Actually, a lot. This is your \$500 annual marketing budget.

Stationery \$75

You're going to purchase pre-printed stationery that has your name, firm name and firm address across the top and on the top left corner of the envelopes. For that amount, you'll have enough stationery to write at least two handwritten letters to colleagues and contacts each week. You'll have enough to write three and even four handwritten letters a week, but let's stick to two. Every Tuesday and Thursday, you will select a name from your contacts, a possible referral source, and write them a pleasant, thoughtful note, thanking them for something, appreciating them in some way or congratulating them for



FRANK RAMOS

something they recently did or accomplished. You're not going to ask for business. You're not going to include your business card. You're just going to write a pleasant, handwritten note. The recipient will be grateful, will be appreciative and will think of you if they have a matter arise. Let's say you mail out 100 handwritten notes for the year, and you get only 2 or 3 cases. That's the best \$75 you've spent.

Coffee \$250

Instead of lunch, or drinks or tickets to an event, you're going to meet potential referral sources for coffee first thing in the morning. You're going to order a small black coffee and you're going to offer to pay for your guest's coffee, or latte, or tea, or whatever they want. If you go to the same coffee shop throughout the year, you'll earn perks and a few free coffees along the way. You'll meet with your contact for about 20 minutes, catch up, talk shop and you'll accomplish effective marketing for \$8 or less. Try to schedule a coffee

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ATTORNEY MARKETING

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meeting at least every other week, and if possible once a week. On average, with you buying a small coffee and your guest likewise getting a modest coffee, you're going to average \$6 or less per coffee meet, which is about 40 or so coffee meets for the year if you allot \$250 for coffee for the year.

Special Business Card \$75

Business cards are so ubiquitous but you can use them in new and novel ways to your advantage. You can write and give away your own e-books, which you can write and design with one or more of the programs or platforms your firm already uses. E-books don't have to be long and they don't have to give away all your expertise, but should have enough content so you'll be giving something away of value. On your business card, you'll have a QR code or a link that takes the recipient of the card to the book, which they can read for free. You reap what you sow in this world, and you get what you give, and the more you give the more you get.

Holiday Cards \$100

If you search online, you'll find

several websites and several outlets where you can buy holiday cards in bulk. Not just Christmas cards, but Thanksgiving, Halloween, Birthday, etc. Imagine getting a large box of generic birthday cards and sending personalized birthday cards to contacts (you can easily find anyone's birthday these days on their social media pages). Like the handwritten cards, signed birthday cards, with a little note, go a long way to building relationships that lead to business.

So there you have it. A \$500 marketing budget that will lead to referrals, matters and cases.

Frank is the Managing Partner of Clarke Silverglate, where he practices in the areas of commercial litigation, drug and medical device, products liability and catastrophic personal injury. He is AV rated by Martindale-Hubbell and is listed in Best Lawyers in America for his defense work in product liability matters. Frank has been with Clarke Silverglate for virtually his entire career. He has tried to verdict personal injury, medical malpractice, product liability, and inverse condemnation cases. As a certified mediator, Frank has resolved numerous matters through alternative dispute resolution.

Frank is an ambassador for the Firm's

mission of leadership and service. He has been President of the Florida Defense Lawyers Association and the 11th Judicial Historical Society and has served on the boards of the Defense Research Institute, Florida International University's Alumni Association, Florida International University's Honors College, Parent to Parent of Miami, Miami-Dade Defense Bar Association, Legal Services of Greater Miami, and Florida Christian School. He serves as a mentor to countless young lawyers and law students through his publications, social media posts, presentations, webinars, and his "coffee chats." Frank has written 15 books for lawyers, edited five books for lawyers, and has written over 400 articles for lawyers and business professionals.

Franks's dedication to young lawyers is exemplified through his development of a Deposition Boot Camp and Art of Marketing Program for the Federation of Defense & Corporate Counsel, an invitation-only defense organization that handpicked Frank for membership just eight years into his practice. Frank's daily practice pointers and business tips on LinkedIn has almost 35,000 followers.

In his spare time, Frank enjoys writing, reading science fiction, and listening to his two sons, David and Michael, perform classical and jazz music.



The Florida Law Practice LINK is prepared and published by The Florida Bar Solo & Small Firm Section.

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EXPANDING THE TABLE: EUGENE PETTIS ON DEMANDING AND DISCUSSING CIVILITY IN UNCIVIL TIMES

By Tabitha Guinot, 3L FSU College of Law

There are few attorneys with a resume as impressive as that of Eugene Pettis. Since being admitted to The Florida Bar 35 years ago, Pettis has been inducted into the American College of Trial Lawyers, recognized as Lawyer of the Year three times in three different areas of law, and served The Florida Bar as its first African-American President in 2013. Pettis' new dialogue series "Can We Talk?" seeks to change the legal field through shared conversation in which lawyers empathize and learn from their differing experiences. According to Pettis, attorneys are obligated by oath to advance open, honest conversations which revolve around differing opinions in order to move law and society forward. While the community may choose to engage in tribal responses, attorneys must rise above the politicization of disagreements and meet one another with civility.

According to Mr. Pettis, civility, at its core, is the ability to have a conversation or point of disagreement in a way that fosters a resolution. While a standard of civility must be set the day students walk into law school, civility is not limited to interactions with legal colleagues concerning legal matters. Civility must encompass every aspect of a lawyer's life. As Eugene Pettis states, you cannot be a civil lawyer but lower your standards of civility when you step out into the community. You must be the total package.

"In every great moment of society, lawyers have had an opportunity to be engaged at the forefront." Lawyers are looked at continuously as carrying a higher standard of civility than others. Serving as the voice of those not easily seen or heard, it is imperative



TABITHA GUINOT

lawyers be able to handle a high level of communication with civility. Lawyers should be able to hear opposition and respond to their views facilitating and moving dialogue toward progress.

In his more than three-decade career, Mr. Pettis realizes there are factors attorneys face today that were not relevant in 1985 when he began his career. Like most, Pettis has noticed the impact that technology has had, particularly on intra-attorney communications. Reflecting on his early years in practice, by the time an angry message was written, edited, and rewritten on an electronic typewriter, a jolted attorney had plenty of time to cool down from his initial irritation. Now, with email access in our pockets, attorneys are emboldened to respond as quickly as possible. Branding this practice the "faceless dialogue of technology," Pettis acknowledges that, unfortunately, these advancements have put people in the position where they put their worse self forward, instead of coming into the light and presenting their best selves.

Another major difference Mr. Pettis sees is an influx of first-year sole

practitioners. With more graduates coming out of law school and immediately hanging up their shingles, Pettis poses an obvious question: "Who are they going to mimic?" Laughing at the instincts on which he relied in his first trial, Pettis places high regard on the opportunity for modelling: witnessing an experienced attorney in action and developing a litigation style based on what has been observed. By extending to new lawyers these modeling opportunities, they will learn how to apply civility in the varying circumstances attorneys face. Unfortunately, those opportunities are missing today in comparison to their prevalence years ago.

While it is incumbent that attorneys promote civility in their practice, Eugene Pettis says that courts play a huge role in demanding civility as well. One of the odd byproducts, however, of an elected court system is judges are put in the uncomfortable position of disciplining lawyers while trying to secure election votes from them later. While there are those which will continuously rise above, as a result, judges with the power to sanction bad behavior rarely do because of the partial-popularity contest that is a judicial election.

When the court does not demand civility, there will be attorneys who take advantage. Because of tolerance toward bad behavior, Mr. Pettis has seen lawyers push the envelope, in total disregard of a judge's all-too-clear order, because he or she knows there will be no sanction. This is where self-policing is crucial. "None of us should be tolerating bad behavior," states Pettis, and he advises lawyers to

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speak up against inappropriate behavior directed at other lawyers, clients, and anyone else.

While it may seem unreasonable for a fresh-faced graduate just out of law school to confront experienced attorneys on their unprofessional behavior, Pettis believes that we cannot allow disparity of age and experience to prevent us from speaking up for what is right. "Some things you learned as a child. How to behave civilly is not something you should start learning in law school... Right is right." Tolerating bad behavior in the first five years of practice will not make a lawyer any more confident in chastising it in the next five. Character is born and respect is given when an attorney stands up for what is right even in the most daunting of settings.

A silver lining in a dreary year, 2020

has set the stage for lawyers to open dialogue on controversial topics, such as race. Attorneys must find ways to have a shared conversation involving all sides. There is an opportunity for attorneys to enlarge their perspectives by listening to each other's experiences. The legal field should look to set an example of empathy and respect for opposing views.

Pettis brings up the individualistic nature which is permeating the community. Those who show less respect, he predicts, are more individualized, caring only about what will benefit themselves, not what will have the most positive impact overall. There is a hoard mentality prevalent which is keeping us from sharing opportunity. But inherent to civility is a care and respect for the institution and society, and as part of the justice system, we should attempt to model empathy and tolerance towards race and diversity. As Eugene Pettis says, there is plenty of room for all of us at the table of

opportunity. "I'm not asking you to get up out of your chair and give me your seat...let us all eat at the table."

Tabitha Guinot is a third-year student at Florida State University College of Law. She is interested in practicing criminal law and hopes to work as an Assistant State Attorney upon graduation. Tabitha interned with the Henry Latimer Center for Professionalism in Summer 2020 and has since adopted an appreciation for writing, working daily to improve.



Eugene K. Pettis, Esq. is the co-founder of Haliczzer, Pettis & Schwamm, handling medical malpractice and complex personal injury litigation. Attorney Pettis was also the first African-American Florida Bar President (2013), leaving a legacy of initiatives that fostered diversity and inclusion.



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8–8:10 AM Welcome and introductions.

8:10–9 AM Let's Talk. Improving Team Building and Communication Skills in A Virtual World. One of the challenges of the virtual world is learning how to work effectively as a team. In addition, working remotely adds new wrinkles to how we communicate – not only with the team but with clients. This session will provide strategies that will help you more fully engage your team and tips to improve your communication with both your team and with clients. Presented by **Nora Bergman** of Real Life Practice.

9–9:55 AM Systems Thinking and Technology for Running The Lean Law Firm. While nearly every industry has jumped with both feet into the future, law firms have mostly failed to capitalize on the “science of industrial management.” No more. Learn how to transform your law firm using Lean methods and technologies pioneered by Toyota and relied upon by the world's most profitable and highest performing companies from **Dave Maxfield**, lawyer and co-author of the ABA's bestselling book, “The Lean Law Firm.”

9:55–10:10 AM Break

10:10–11:05 AM Virtual Law Clerks and Contract Lawyers: Hiring, Training and Firing; Outsourcing. How do you find contract lawyers, integrate them into your practice, and provide sufficient oversight? What are the employment law considerations when hiring, training and firing law clerks and contract attorneys, particularly when working virtually? How do you determine the appropriate rates? Presented by **Kristin Tyler** of LawClerk.

11:05 AM–12 PM Law Firm Autopilot. Effectively leveraging technology and automating aspects of your practice will free you up to focus on meaningful work. Presented by “Ernie the Attorney” **Ernie Svenson**.

12–12:55 PM How to Sustain and Grow a Solo and Small Firm Practice With the Use of Technology. A panel discussion with practitioners who have established successful solo and small firms will discuss their practice models and use of technology. Moderator: **Cristina Alonso** of Alonso Appeals. Panelists: **April Martindale** of Martindale Law, **Camara Williams** of Smith & Williams Trial Group, and **Liz McCausland** of Liz McCausland, P.A.



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All one-credit webinars are 12 – 1 PM. One-credit live InReach webinars are \$50 for Solo & Small Firm Section members and \$95 for non-section members. Wednesday Wisdom Zoom webinars are free for section members. Updates and registration information are available at flosolomallfirm.org/calendar.

January

19—Luca Hickman, Registered Patent Attorney, Henderson, Franklin, Starnes & Holt, P.A., Fort Myers, **Digital IP: Helping Clients Protect, Defend & Recover Intellectual Property Rights Online, In Social Media & E-Commerce Platforms**. Live InReach webinar. Course number 4276.
1.0 General; 1.0 Technology CLE credit. [REGISTER](#)

27—Rob Howard, founder and president of RC Howard and Associates, LLC; Sandler Training of Greater Tampa Bay, Clearwater, **Professional Approach to Managing the Client Experience**.
Free Wednesday Wisdom webinar. 1.0 General CLE credit pending. [REGISTER](#)

February

12—Virtual Solo & Small Firm Conference, **Virtually Irresistible: Tech Tools and Strategies for Solo and Small Firms**. 8 AM – 12:55 PM., \$185 section members, \$230 non-section members. [Course 4253](#),
5.0 General; 3.0 Technology CLE credits. [REGISTER](#)

16—Nicole (Niki) Black, attorney and legal technology evangelist, MyCase, Rochester, NY, **Practicing with the Machines: Artificial Intelligence, Automation & Technology Tools**. Live InReach webinar.
Course number 4277. 1.0 General; 1.0 Technology CLE credit. [REGISTER](#)

March

16—Renee Thompson, attorney-mediator, Upchurch Watson White & Max, Ocala; and Liz McCausland, attorney, Liz McCausland, P.A., Orlando, **Increase Your Law Firm Productivity and Efficiency Using Apps**.
Live InReach webinar. 1.0 General; 1.0 Technology CLE credit pending.

24—Teresa Byrd Morgan, Morgan Law Center of Lake City; Sean Desmond, Desmond Law, PLLC of Tallahassee; and John Maceluch, Jr., Maceluch Law Firm of Panama City, **Practice Tips from Highly Successful Solo & Small Firm Attorneys**.
Free Wednesday Wisdom webinar. 1.0 General CLE credit pending. [REGISTER](#)

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April

20—Melanie Griffin, Of Counsel attorney at Shumaker, Loop & Kendrick, LLP, Tampa, and Senior Advisor, Business-to-Business Relationships of Shumaker Advisors Florida. **Time Management Strategies & Life Hacks for the Productive, Professional Lawyer**. Live InReach webinar.
Course number 4278. 1.0 General; 1.0 Professionalism CLE credit.

28—Rebecca Bandy, Director, The Henry Latimer Center for Professionalism at The Florida Bar, Tallahassee, **Using EQ to Improve Your Life and Practice**. Free Wednesday Wisdom webinar.
1.0 General; 1.0 Professionalism; 1.0 Mental Illness Awareness CLE credit pending.

May

11—Frank Ramos, Managing Partner, Clarke Silverglate, P.A., Miami, **Virtual Business Development – Developing Relationships, On and Offline**. Live InReach webinar.
1.0 General; 1.0 Technology CLE credit pending.

19—Christine Phipps, Registered Professional Reporter, President of Phipps Reporting, Inc., West Palm Beach, **Court Reporting, Technology and Ethics**. Free Wednesday Wisdom webinar.
1.0 General; 1.0 Technology; 1.0 Ethics CLE credit pending.

June

10 — **Florida Law Update 2021**, 7:55 AM – 4:25 PM, 8.0 General CLE credits pending.

There are four options for accessing Solo & Small Firm Section-sponsored CLE courses:

1. Visit our [calendar](#) to register for upcoming monthly live audio webcasts and free Wednesday Wisdom Zoom webinars.
2. Join our section's members-only [Facebook group](#) to access a video library of previously recorded Wednesday Wisdom webinars.
3. Purchase previously recorded section CLE through The Florida Bar, available 24/7 as [on-demand seminars and podcasts](#).
4. Purchase previously recorded section CLE through The Florida Bar in [CD or DVD format](#).

Interested in presenting a CLE program in Fall 2021? Please email Solo & Small Firm Section CLE Committee Chair [Linda Calvert-Hanson](#).

SSF SECTION CLE

The Solo & Small Firm Section traditionally offers several live CLE programs each year. Due to COVID-19, our popular Florida Law Update and Annual Ethics Update were presented as virtual webcasts. Both seminars and our Solo and Small Firm Conference are available 24/7 on-demand and podcast and on CD or DVD.

Solo Small Firm Conference:

“SOS: SECURE, OPTIMIZE, SYSTEMIZE. Survive—and Thrive—Strategies for Solos and Small Firms.”

February 7, 2020, 7 General, 1 Ethics, 1 Mental Illness, 2 Technology, \$295. Course number 3490.

Secure the Hatches: Cybersecurity and Privacy for Lawyers—Al Saikali, Valerie Barnhart, Bryan Barnhart

Know the Ropes: Bar Resources, Mentoring and Member Benefits—Liz McCausland, Lynn Whitfield, Renee Thompson

Lighten the Load: Automation, Integration and Paperless Strategies—Jennifer Kuyrkendall Griffin,

Liz McCausland, Felicia Mickens Williams

All Hands On Deck: Creating and Managing a Successful Virtual Law Firm—Mindi Wells,

Priscilla Horn Warren, Chelsie M. Lamie

Bridging the Gap: Generating Outside Income and Revenue Streams—Mindi Wells, John Schaefer, Theresa Jean-Pierre Coy

Stay the Course: Surviving Solo While Sick—Theresa Jean-Pierre Coy, Mandi Clay

Toe the Line: Ethics and Social Media—Leisa M. Wintz, Joanna Garcia Parkin, Lanse Scriven

Florida Law Update 2020. June 18, 2020, 8 credits \$195. Course number 2353.

Business & Litigation Law—Robert Clayton “Clay” Roesch, *Employment Law*—Kevin Johnson,

Animal Law—Ralph DeMeo, *Elder Law*—Peggy Hoyt, *Estate Planning*—Alex Douglas, *Criminal Law*—Denis DeVlaming,

Family Law—Ralph T. White, *Real Property Law*—Michael Gelfand

2020 Annual Ethics Update: “Legal Ethics in a Changed World.”

October 16, 2020, 5 credits; 5 Ethics, \$185. Course number 4115.

Leadership, Innovation and the “New Normal,”—Teresa Schmid

Video Conferencing Risk Management Considerations—Joanna L. Storey

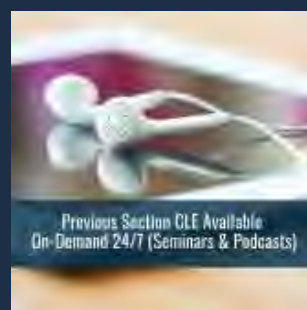
Ethics and Risk Management: What will the “New Normal” Look Like?—Karen Rubin

Maintaining Professional Decorum in the “New Normal,”—Eugene Pettis

How the COVID-19 Pandemic has Impacted the Physical and Mental Health of

Florida’s Legal Community—Dr. Scott Weinstein

The section offers four ways to access CLE. Click the images below to browse.



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SELECT PAST SOLO & SMALL FIRM SECTION CLE AVAILABLE ON DEMAND/PODCAST or CD/DVD

Microsoft Word - Tips & Tricks to Make Microsoft Word Work for You, Not Against You

Jennifer Kuyrkendall Griffin, General Magistrate.

September 25, 2018 renewed, 1 credit Technology \$50. Course number 2874.

This Really Happened: Taking the High Road of Civility and Professionalism

Jacina Haston, Solo & Small Firm Section Chair-elect & former Director of The Florida Bar Henry Latimer Center for Professionalism, and Jennifer Kuyrkendall Griffin, General Magistrate.

February 6, 2019 renewed, 1 credit Professionalism \$75. Course number 2877.

Medical Marijuana & Hemp Update in Florida: Ethics and Law

Tara Tedrow, Shareholder & Chair, Cannabis and Controlled Substance Group,
Lowndes Drosdick Doster Kantor & Reed

January 21, 2020, 1 Ethics credit \$55. Course number 3410.

Sharing is Caring: The Ethics of Sharing Fees Among Law Firms

Kristy Johnson and Jason Alderman, Alderman Law Firm

February 18, 2020, 1 Ethics credit \$55. Course number 3411.

Work, Interrupted

Steve Riley, Atticus

March 17, 2020, 1 credit \$55. Course number 3412.

Merging Law Firms and Promoting Associates to Partners: How to Handle the Legal Structure of Law Firm Ownership

Laurie Lee, The Legal Department for Service Professionals, PA.

April 21, 2020, 1 credit \$55. Course number 3413.

10 Lessons for Happy Lawyers: Boost wellness. Build resilience. Yes, you can.

Nora Bergman, of Real Life Practice

August 18, 2020, 1 credit; 1 Mental Illness credit, \$50. Course number 4013.

Law Firm Automation: Processes & Procedures

Chelsie M. Lamie, Personal Injury Law Office of Chelsie M. Lamie

September 15, 2020, 1 credit, \$50. Course number 4061.

Tools to Increase Your Bottom Line

Danielle Babcock, Thomson Reuters

October 20, 2020, 1 credit, \$50. Course number 4062.

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2020-2021 Section Advocate



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In partnership with The Florida Bar Solo & Small Firm Section, Thomson Reuters is providing complimentary access to our new [playbook for small firm attorneys](#).

Work Smarter, Not Harder: Using Integrated Digital Marketing to Enhance Your Practice

Integrated digital marketing is the most straightforward, cost-effective, and high-yield strategy to connect with clients and keep a law firm running. Digital marketing tools aren't kept secret from anyone, but many solo attorneys don't use them effectively, and some don't employ them at all. And given how rapidly the online world evolves, even solo attorneys who have benefited from them in the past can use a polishing-up from time to time. In this guide:

- Learn what an integrated marketing approach overview looks like for a solo practitioner.
- Explore how the components of an integrated approach can be used to maximize impact.
- Walk through a hypothetical example so you can see this approach in practice.

[Access your complimentary playbook here.](#)



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PREPARE YOUR OWN OWNER'S MANUAL: PLANNING TO PROTECT YOUR FIRM, CLIENTS AND FAMILY IN THE EVENT SOMETHING HAPPENS TO YOU — PART I

By Anne-Marie L. Bowen, Esq., Orlando

No one likes to think that something could happen to them, but let's face it, life happens. For sole practitioners and small firms, as well as the rest of America, this year has given us a lot to think about including our priorities and what matters most. Now is a great time to plan for your future by safeguarding the practice you have built and are building.

If you are like many law firm owners, you have a million things inside your head that only you do—and you are the only one who knows *how* to do these things. Whether you are a single-person law firm with no or few employees, or a firm with 10 to 50 employees, it is likely that as the owner, there is a lot of information stored in your head. Even if you have a law partner, there are still things that only you do. This article is to help you think about the things you need to write down in your own “owner's manual” so that somebody else can do what you do in the event of your unexpected absence from the firm. Let's get started...

CONTACT LISTS

Staff. Make a list of your staff including current and former employees who know key information about you and your firm. Include the person's name, position, address, phone number and email address. What specific information does each person know? Write it down! For example, if your last assistant recently left your firm, this person may be willing to share his or her knowledge of your firm in the



ANNE-MARIE L. BOWEN

event that something happens to you. Keep this staff list up to date.

Work Colleagues. Who can help with what? You know colleagues and friends in your practice area and in other areas who might be willing to assist. Is there someone who should be listed as a contact person who would help on a specific big case, a big deal or a big transaction? You might have a special case for which you know that a certain outside attorney would be ideal to help your client. Write down that person's name as someone to be contacted if you are out of the office for an extended period.

You know your cookie-cutter cases from your most time-consuming, urgent, high-attention cases. If you have a special case, matter or transaction, notate in the file and in your owner's manual which attorney should be contacted if the client needs legal help while you are out.

Professional Friends. Who would want to know if something happened to you? This may be people who are not in your practice area, but perhaps your friends since you were baby lawyers. Friends you have been meeting for lunch periodically for the last five-plus years. Friends you served with on a board. These are people that your spouse may not know if you only see them in your workday setting.

Trusted Business Advisors. Make a list including contact information (name, position, address, office and/or cell phone numbers and email addresses) for your trusted advisors including:

- CPA/accountant
- Banker
- Bookkeeper
- Insurance agents
- Retirement or investment advisor

Independent Contractors/Others.

- Remote paralegal. Besides the above information list, how he/she is paid and any information he/she could help with.
- Cleaning staff or cleaning company. Who, when do they come, how much are they paid, and when are they paid.
- Lawn maintenance people
- Handyman
- Others?

Passwords. Someone needs to be able to find your passwords to all the things you use.

continued, next page

OWNER'S MANUAL

from page 14

- Where do you keep them?
- How do you read them?
- Do you use an electronic system such as OnePass to save your passwords?
- Do you write your passwords down in a password book? If so, where do you keep that?
- Are they stored on your computer? If so, where? Write it all down and tell someone you trust where they are.
- Please, be specific somewhere. Do not just say "in my phone." Say exactly where in your phone, and how to get there, and how to read it. If you write "in code" your trusted person may not figure it out.
- Also, your phone needs to have more than just your finger swipe or your retina eye recognition to open. It needs a password written down somewhere, with someone knowing where to find that, and not just inside the phone!

Passwords that should be recorded include:

- Cell phones
- All computers
- Internet on each computer
- Email
- Website
- Bank accounts
- Retirement accounts
- Investment accounts
- QuickBooks
- Case Management Software
- Best Case or other practice specific software
- CM/ECF
- Billing software
- Credit cards

- All social media accounts such as Facebook, LinkedIn, Instagram, etc.
- Marketing account such as FindLaw, AVVO.com, Lawyers.com
- The Florida Bar
- Other professional sites

Computer

Who do you call if your computer crashes?

Are you networked?

If so, you need the passwords to all computers and you need to list who can help with this.

What is your computer backup system? Is it in the cloud? If so, where? Where is the password to the cloud? Is it on an external hard drive? If so, where is that kept? How often do you backup? Does someone take a backup drive home? How often?

Case Management System

Do you use Time Matters, Clio, or another case management system? How do you get into it? What are the website, username and password?

What is in the case management system? Case notes, all documents filed with the court, all files scanned in, recap email, etc.

Planning for an unexpected absence from your law firm is a priority everyone should consider, knowing that any of us could be struck at any time with COVID-19 or more mundane unexpected things such as a heart attack or car wreck.

In Part II of Prepare your Own Owner's Manual, we will discuss banking and trust accounts, billing, payroll, expenses, taxes, and other legal considerations. Until then, get started today. Commit to just 15 minutes to get started. As Benjamin Franklin famously said, "If not now, when?"

Anne-Marie L. Bowen is a sole practitioner with Anne-Marie L. Bowen, P.A. in Orlando. She has owned and operated her own firm since 1994. She practices consumer debtor bankruptcy law and is the author of the book, [Forgive Us Our Debts: When is it Okay for Christians to File Bankruptcy.](#)



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PARALEGAL CORNER

NEWS FOR PARALEGALS TO USE...

By Priscilla Horn Warren, CP, FRP



PRISCILLA HORN WARREN

Welcome to the Paralegal Corner, where you can find breaking news and other useful items (including website link information) pertaining to our profession.

The Paralegal Association of Florida, Inc., for its Annual PAF Fall Seminar, held a virtual conference on “Paralegals in the New Era” on October 16, 2020.

SAVE THE DATE: The Solo and Small Firm Section has finalized its CLE program and speakers’ roster for the annual Solo and Small Firm Conference. This “Virtually Irresistible: Tech Tools and Strategies for Solo and Small Firms” seminar will be a virtual workshop to be held on **February 12, 2021**. Please go to our [website](#) for more information on registration or contact our Section Administrator, Ricky Libbert, at rllibert@floridabar.org or 850-561-5631.

We sincerely hope you and your community have not been significantly affected by the ongoing pandemic issues. Please note that the Wednesday Webinar CLE noontime

seminars offered by the Solo and Small Firm Section (free to members), continue to be popular and welcomed by all, for current information on legal issues.

If you are not an affiliate member of the Solo and Small Firm Section, what are you waiting for? Just download the online form today and send it in. Affiliate memberships are only \$35 per year. Multiple benefits are available to our members and affiliate members, as detailed in our [website](#). Becoming an affiliate member of the SSF Section might be one of the best personal and professional decisions you will make for your paralegal career to flourish and prosper.

For those of you who wish to learn more about the FRP designation, please log into The Florida Bar website for Florida Registered Paralegals, and click on the Florida Registered Paralegal tab.

Finally, for additional information on NALA, the nationwide paralegal association, and/or requirements for obtaining your national Certified Paralegal designation, kindly visit the NALA [website](#) for membership requirements and continuing education opportunities that are available online.

Please do not hesitate to contact me with any questions or concerns. My direct email is: pris2323@yahoo.com.



MOVING?

Need to update your address?

The Florida Bar’s website (www.FLORIDABAR.org) offers members the ability to update their address and/or other member information.

The online form can be found on the website under “Member Profile.”



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NEW TO SECTION? WELCOME!

We're so glad you joined our section and are eager to share ways for you to get involved and network with other members. Our website www.flsolosmallfirm.org has a wealth of information including a [calendar](#) of upcoming events and the Committee Preference Form. [Committees](#) this year include:

- Continuing Legal Education, Linda Calvert Hanson, Chair
- Outreach & Expansion, Jacina Parson, Chair
- Publications, Jennifer Dietz and Liz McCausland, Co-chairs
- Sponsorship, Cristina Alonso, Chair
- Transition to Solo, Chris Johnson, Chair

Other ways to participate could include:

- contribute an article for the LINK newsletter
- volunteer for the Section Member Spotlight in QuickLINK e-news and section social media
- attend an Executive Council Reception in your area
- exchange ideas and share events on social media
- reach out to us, we would love to hear your ideas...





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