

The Florida Law Practice

LINK

For Florida Lawyers – By Florida Lawyers

A JOURNAL OF THE GENERAL PRACTICE, SOLO AND SMALL FIRM SECTION

The Florida Bar

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Spring 2016

Wild, Wild Tech: Taming the Technology Beast

The annual Solo & Small Firm [Technology Conference](#) was Jan. 22 - 23, 2016, at the Hilton Orlando Lake Buena Vista during The Florida Bar Winter Meeting. The conference featured an excellent lineup of speakers headed by Florida Bar technology consultant [Adriana Linares](#) of LawTech Partners, [“Ernie the Attorney” Svenson](#) and [Craig Ball](#) on topics from managing online reputation to demystifying encryption. Presenters included [Shari Borek](#) on practice management software, [John Sawicki](#) on metadata, [Jason Marsh](#) on online advertising, Florida Bar President [Ramón Abadin](#) on privacy and data security.

The two-day event came to life on a big screen, with guests and speakers posting comments to social media using the #WildWildTech hashtag and viewing the stream live on Twitterfall. Conference guests earned 10 CLE credits, including one ethics, through presentations by nationally known experts on the latest technology developments and best practices to improve law firm management and security.

Chair Jennifer Kuyrkendall put together an interactive event that included an impressive array of exhibitors and numerous opportunities for networking.

“Our goal was to ensure that guests left the conference with information that they immediately could put to use in their practices,” said Kuyrkendall. “Free software trials, discounts and giveaways by our exhibitors allowed participants to interview vendors and preview the newest tech and practice management software.”

Former section and conference chair Teresa Byrd Morgan said the event gave her an opportunity to find new practice management software for her firm.

“I met with every software vendor who exhibited at the conference, and was impressed with the quality and functionality of their programs and offerings,” said Morgan. “Through this process, I identified a software vendor who met my firm’s needs perfectly, and I could not be more pleased with its implementation and the immediate improvements we have experienced.”

Highlights from the 2016 Solo & Small Firm Conference:

- Tradition of Excellence Award winner Carl Schwait was honored for efforts that have been beneficial to The Florida Bar and the general practitioner.
- Walter S. Crumbley Award recipient Renee Thompson was honored for her significant contribution to practice management in Florida.
- Participants had the opportunity to meet and discuss topics of interest with others from their practice areas at our popular networking luncheon.
- The Young Lawyers Division, our education partner for the event, awarded conference scholarships to Florida Bar members who are members of both the YLD and the Solo & Small Firm Section.

See “Technology Conference,” page 12

MARK YOUR CALENDARS

For the ALL-NEW Florida Bar Tech Show

Presented by the Solo & Small Firm Section

Jan. 27-28, 2017

Gaylord Palms, Orlando

More Tech, More Tracks, More CLEs, More Speakers, More Gadgets. More of everything you need to make sure your practice is technology driven.

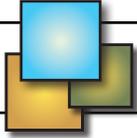
The CD and DVD versions of “[Wild, Wild Tech: Taming the Technology Beast](#)” (course 2022C or D) – are available to [purchase online](#). All Solo & Small Firm Section members receive a \$35 discount and can earn 10 CLE credits, including one ethics. Details are available in the [conference brochure](#).

Thank You to Our 2016 Solo & Small Firm Conference Exhibitors

Barry University School of Law, Clio, Cosmolex, FindLaw, JR & Associates Legal Nurse Consultants LLC, LawPay, Florida Bar Legal Specialization and Education, Paralegal Association of Florida, PracticePanther, Rocket Matter, Ruby Receptionists, Smokeball, Thomsom Reuters and Wasson Bay Area Insurance.

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MESSAGE FROM THE CHAIR

by **Damon C. Glisson**
2015 – 16 GPSSF Section Chair

GPSSF as our section is known, continues to have a dynamic and engaged executive counsel. Beginning at the Long-Range Planning meeting in March of 2015 we embarked on a new format for long-range planning and adopted a strategic plan format. The executive council has continued to work on the long-range plan at every meeting with the assistance of the Section’s public relations consultant, Lisa Tipton.

Incoming Chair-Elect, Jennifer Dietz, intends to continue the strategic plan format at the long-range planning meeting April 8th and 9th, 2016. In addition, to changing the format of our long-range planning the executive council has also requested The Florida Bar for a name change of the section to simply, The Solo and Small Firm Section. This does not mean that the Section is abandoning our mission of providing service to general practice firms, as well as, solo and small firm members who may not fit the classification of general practice. Perhaps by the time of this publication the name change will have taken place and reflect the trend in voluntary bars and ABA to the shorter name of the section.

Under the leadership of Past-Chair, Margaret “Peggy” R. Hoyt, we will be offering an all-day General

Practice Annual Convention CLE, The Florida Law Update. The Florida Law Update is an ever popular CLE cornerstone of the annual convention. I would also like to thank Kimberly Menchion, for her work in putting on a President’s Showcase CLE at the 2015 Annual Convention. The Section featured on October 2nd CLE, the Annual Ethics Update which was held in Tampa, and as it has been the case for several years now, was under the experienced leadership of Eugene E. Shuey; for which we owe our thanks and appreciation for his many years of service. Sadly, I accepted Gene’s request to find a new Chair for the Annual Ethics Update, and this year our Past-Chair, Linda Calvert Hanson, took over Chair of the Annual Ethics Update and ably guided us through the seminar which remains very popular both in person and through online attendance.

The Ninth Annual Solo and Small Firm Technology Conference was held at the Florida Bar’s winter meeting in Orlando, in January of 2016. This day and a half seminar focused on the management and technology needs of solo and small firms and continues to be a cornerstone of the Florida Bar’s winter meeting. This year’s conference entitled, Wild, Wild Teach: Taming the Technology

Beast, was chaired for the second time by Jennifer Kuyrkendall. This year for the first time we were able to have live Tweets on a large screen in the conference room as the conference progressed. The conference room and hallway was again filled with vendors, many of them new to the conference, with mostly technology products to assist attorneys with their needs for law office management. The conference had the traditional networking luncheon which was very successful at bringing together attorneys with like-minded interests. Also, the event was attended by the Florida Bar President, Ramón A. Abadin, President-Elect, William J. Schifino, Jr., and President-Elect Designate, Michael J. Higer. All three were present for the presentation for the GPSSF Tradition of Excellence Award to Carl Schwait. The Tradition of Excellence Award is given annually to a lawyer whose efforts throughout the year have been beneficial to The Florida Bar, and specifically to the general practitioner. I had the honor of presenting the Walter Crumbly Award to Renee Thompson, for her contribution to the education of young up-and-coming lawyers. Ms. Thompson was formerly the Chair of the inaugural Leadership Academy.

See “Chair’s Message,” next page

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

- Damon Glisson, Apollo Beach *Chair*
- Jennifer Dietz, Tampa *Chair-elect*
- Sean Desmond, Tallahassee *Secretary*
- Jennifer Kuyrkendall, Live Oak *Treasurer*
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- Ricky Libbert, Tallahassee *Section Administrator*
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GPSSF
GENERAL PRACTICE
SOLO & SMALL FIRM
SECTION *of The Florida Bar*

Visit the Section’s website at
www.gpssf.org

CHAIR'S MESSAGE

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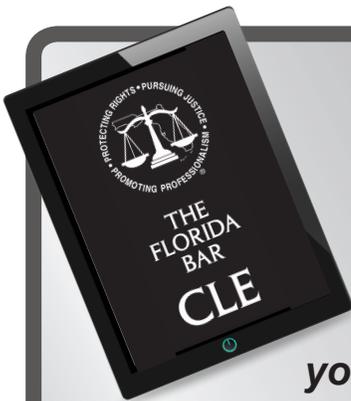
The Walter S. Crumbly Award is given each year to an individual (which may include non-lawyers) who have made a significant contribution to the practice management in the state of Florida. The award was originally created by the Practice Management Development section in honor of the long service of Judge Walter S. Crumbly. The tradition has been carried on by GPSSF since 2008.

The section also makes two other awards annually, the L. Michael Rofino Pro Bono Award to recognize Pro Bono organizations within the state that has put together the best Pro Bono service programs during the year. This year's winner of the award was Dade Legal Aid. This is the oldest award by the section and has been awarded annually since 1990. The section has awarded over \$120,000.00 to Pro Bono programs in the state of

Florida since 1990. This last year we started an award for Paralegal of the Year as our affiliates which consists of Paralegals and Law Office Managers often go unrecognized for their contributions. Ms. Patricia Deramas was our Paralegal of the Year for 2015-2016, for her tireless work as Officer and Past-Chair of the Paralegal Association of Florida.

An important member benefit is our publications. The Publication Committee is chaired by Joshua Hertz who is responsible for the Link, the Section's quarterly e-publication and the QuickLink which is an email and social media based publication which can be read in 5 minutes. The QuickLink is my favorite Bar publication which I never miss reading because it is a fast read, technologically relevant to my practice, is published bi-weekly and available everywhere I might be. Lisa Tipton edits QuickLink and The Practice Resource Institute is a constant contributor.

I know that I have not thanked everybody in this article or even personally, but I ask everyone to recognize the efforts of Ricky Libbert who has been assisting the Section and me for many years. Ricky and I became acquainted in 1996 when she assisted me in presenting the first internet seminar for The Florida Bar, held at the Buena Vista Palace in Kissimmee, Florida. She continues her tireless efforts in assisting the Section in putting on complex technology seminars to this date. For those of you that may not have been at the 1996 Annual Convention, the theme of the convention was Surfing the Net, and our entertainment was provided by the Beach Boys' Mike Love. I also want to thank each and every one of the executive council for supporting me through this year and I have every confidence that Chair-Elect Jennifer Dietz will exceed anything that I have been able to accomplish in the 2015-2016 Bar year.



Did you know?

When you register for or purchase a

FLORIDA BAR CLE

you now receive a searchable, downloadable

ELECTRONIC COURSE BOOK

This document is sent to you via e-mail before a live course or upon your order of CDs and DVDs. Hard copies of the course book are still available for purchase separately (usually \$60 per book).

The Bar's CLE programs remain the same quality and low price as always, however, **now the book format is your choice**. For more information, please see course registration forms or visit www.floridabar.org/CLE.



A paperless law firm seems like an oxymoron. After all, attorneys are known for having shelves full of legal documents. Please do yourself and the environment good by minimizing your dependency on paper.

As more and more businesses are ditching paper in favor of electronic and wireless devices, it's only logical to follow suit. Millions of companies have boosted their productivity, profits, and mobility in more ways than one when they've moved away from paper. Check out how easy it is to convert your office, too!

Why going paperless makes sense

- it is environmentally friendly
- cuts back on paper costs
- saves loads of time when finding files
- increases mobility because your documents are online

For years, law firms became known for the copious amounts of paper that went through their offices. Unless these papers were organized neatly and methodically, it was pretty much torture to retrieve information.

Preparing your law firm to become paperless

Before you rush to use all that paper you've accumulated in your firm as firewood, you'll need to do some preliminary preparation.

1. Invest in a quality scanner. Although it's exciting to buy a nine-in-one version, it's a better idea to get a dedicated scanner.
2. Buy an inexpensive paper shredder. Most shredders work by shredding your paper into strips. However, we suggest that you find one that can go the extra mile and process the paper into smaller pieces. There are even services out there that will take your mountains of paper and shred it for you, if you're so inclined, like Shred-It.
3. Getting electronic devices on board to help you work from anywhere.
4. Requesting for electronic bills and statements from banks and service providing companies.
5. Create an e-signature. Most law firms depend on printing out that one page where their signatures are required and then scanning it and sending it back to the sender. Scan your signature once, and use that wherever needed.

How to ditch all that paper

Make sure you're following our step-by-step guide on how to switch from paper documents to online documents.

1. Scan all your documents. This is going to be a time consuming task if you haven't already been scanning those memos. However, please take whatever time it takes to get this out of the way.
2. Create several folders on your computer, and save your scanned documents directly into these folders so they don't get lost.
3. Upload scanned copies to cloud storage. There are several services available out there that offer completely free storage, forever. For some plans, you might be required to pay a small monthly or yearly fee for extra storage.
4. If you didn't file your documents as you uploaded them to your cloud drive, organize your documents so they'll be a cinch to find later.
5. Take a break. You've gone paperless!

What do I do with all the shredded paper now?

Throw a celebratory We-Went-Paperless party, and use those shreds of paper as confetti! For a more practical use of shredded paper, try throwing it into a compost heap, or like we mentioned earlier, as firewood.





The Practice Resource Institute

The Florida Bar's most comprehensive resource for running your law practice.

The Florida Bar's Practice Resource Institute is designed to help Florida lawyers with law office operations and to assist members' use of technology. This new digital resource is available on The Florida Bar's website, where members can:



- Live chat with PRI practice management advisors and receive answers in real time.
- Explore comprehensive lists of law office technology, tools, and resources.
- Check out new providers and services in the Bar's Member Benefits program.
- Access shareable electronic tools, web-based archives of articles, blog posts, and podcasts.
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Technology



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Management

www.floridabar.org/PRI

FLORIDA BAR SOLO & SMALL FIRM SECTION MEMBER SPOTLIGHT QUESTIONNAIRE

Name, Firm and City:

Jay Kim
Kim Vaughan Lerner LLP
Fort Lauderdale, Florida

What was your first job?

Bank examiner for the Office of the Comptroller of the Currency (OCC)

When did you know you wanted to practice law?

About 4 years after graduating from college, while working as a bank examiner

Do you have a unique experience that has influenced your professional life?

My parents had a small business and were once subpoenaed for a deposition when I was in college. The attorney asked my father to bring to the deposition certain products that he was selling in his store that were the subject of the lawsuit, which apparently involved allegations that the products were counterfeit. When he complied, the products were taken from him, and my father was left without the products or the money he had paid the defendant for them. It was then that I realized that we all need lawyers to protect our rights.

If you could have dinner with a celebrity or public figure, who would it be and why?

Elon Musk because he appears to be today's greatest visionary in the future of transportation

One thing most people do not know about you is:

I cannot stand the smell of tangerines when I am eating something else!

Do you have a favorite quotation?

"Liberty finds no refuge in a jurisprudence of doubt." Justice Sandra Day O'Connor in *Planned Parenthood of Southeastern Pennsylvania v. Casey*, 505 U.S. 833 (1992).

Who or what inspires you?

My wife

Do you have a favorite activity, sport hobby or event?

Track day events, where people take their own cars to the race track

What is one place that you would love to visit?

Antarctica

Family Information (spouse, children, grandchildren, pets)

Spouse: Mia Kim

Children: Bethany, 17 and Rachael, 12

No pets, despite Bethany's greatest wish for a dog.



TECHNOLOGY CONFERENCE

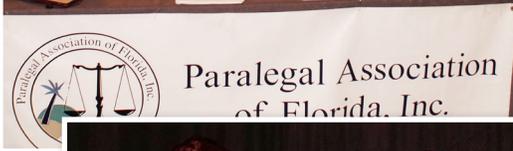
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Florida Bar President-Elect-Designate Michael Higer, President-Elect Bill Schifino, Carl Schwait, Renee Thompson, President Ray Abadin and Solo & Small Firm Section Chair Damon Glisson.



WILD, WILD TECH





THE
FLORIDA
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The Florida Bar Continuing Legal Education Committee and
the General Practice, Solo & Small Firm Section present

Florida Law Update 2016

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

Live Webcast Only Presentation: Thursday, June 16, 2016

7:55 a.m. – 4:25 p.m. E.T.

• **Live Webcast**
• **Audio CD**
• **Video DVD**

Course No. 2059R

To register for June 16, 2016 presentation, you must use the Annual Convention registration form in the May 1 Bar Journal or at www.floridabar.org.

NOTE: Only use this brochure to register for the real time live webcast/virtual seminar or to order the audio CD, DVD, and course book.

7:55 a.m. – 8:00 a.m.

Opening Remarks

Peggy Hoyt, Program Chair

8:00 a.m. – 8:50 a.m.

Criminal Law Update

Denis De Vlaming, Clearwater

8:50 a.m. – 9:40 a.m.

Employment Law Update

Kevin Johnson, Tampa

9:40 a.m. – 10:30 a.m.

Bankruptcy Law Update

Barbara Leach, Orlando

10:30 a.m. – 10:45 a.m.

Break

10:45 a.m. – 11:35 a.m.

Business Law Update

Jay Kim, Ft. Lauderdale

Robert Vaughan, Ft. Lauderdale

11:35 a.m. – 12:20 p.m.

Family Law Update

Wade Luther, Orlando

12:20 p.m. – 1:45 p.m.

Lunch (on your own)

1:45 p.m. – 2:35 p.m.

Real Property Law Update

Michael Gelfand, West Palm Beach

2:35 p.m. – 4:25 p.m. - Double Session

Estate Planning/Elder Law

Alex Douglas, Orlando

Randy Bryan, Oviedo

Sarah AuMiller, Oviedo

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As a webcast attendee, you will attend the program over the Internet. Registrants will receive webcast connection instructions prior to the scheduled course date via email. If you do not receive the email 2 days prior to the event, contact InReach Customer Service at 877-880-1335.

CLE CREDITS

CLER PROGRAM

(Max. Credit: 7.0 hours)

General: 7.0 hours

Ethics: 0.0 hours

CERTIFICATION PROGRAM

(Max. Credit: 1.0 hour)

Business Litigation: 1.0 hour

Criminal Appellate: 1.0 hour

Criminal Trial: 1.0 hour

Labor & Employment Law: 1.0 hour

Marital & Family Law: 1.0 hour

Real Estate: 1.0 hour

Wills, Trusts & Estates: 1.0 hour

Seminar credit may be applied to satisfy CLER / Certification requirements in the amounts specified above, not to exceed the maximum credit. See the CLE link at www.floridabar.org for more information.

Prior to your CLER reporting date (located on the mailing label of your Florida Bar News or available in your CLE record on-line) you will be sent a Reporting Affidavit if you have not completed your required hours (must be returned by your CLER reporting date).

TO REGISTER ON-LINE

<http://tinyurl.com/FloridaBarCLE2059R>

REFUND POLICY: A \$25 service fee applies to all requests for refunds. Requests must be in writing and postmarked no later than two business days following the live course presentation or receipt of product. Registration fees are non-transferrable, unless transferred to a colleague registering at the same price paid.

Register me for the “Florida Law Update 2016” Webcast Seminar

LIVE WEBCAST ONLY: (306) THURSDAY, JUNE 16, 2016 – 7:55 A.M. – 4:25 P.M. EDT

TO REGISTER, FOLLOW THE LINK BELOW OR TO ORDER AUDIO CD / VIDEO DVD OR COURSE BOOK BY MAIL, SEND THIS FORM TO: The Florida Bar, Order Entry Department, 651 E. Jefferson Street, Tallahassee, FL 32399-2300 with a check in the appropriate amount payable to The Florida Bar or credit card information filled in below. If you have questions, call 850/561-5831.

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 Address _____ Phone: () _____
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E-mail address required to transmit electronic course materials and is only used for this order.* **RDL: Course No. 2059R

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WEBCAST REGISTRATION FEE:

- Member of the Real Property, Probate & Trust Law Section: \$250
- Non-section member: \$285

[Click Here to Register](#)

Members of The Florida Bar who are Supreme Court, Federal, DCA, circuit judges, county judges, magistrates, judges of compensation claims, full-time administrative law judges, and court appointed hearing officers, or full-time legal aid attorneys for programs directly related to their client practice are eligible upon written request and personal use only, complimentary admission to any live CLE Committee sponsored course. Not applicable to webcast. (We reserve the right to verify employment.)

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- MASTERCARD VISA DISCOVER AMEX Exp. Date: ____/____ (MO./YR.)

Signature: _____
 Name on Card: _____
 Billing Zip Code: _____
 Card No. _____



Please check here if you have a disability that may require special attention or services. To ensure availability of appropriate accommodations, attach a general description of your needs. We will contact you for further coordination.

Enclosed is my separate check in the amount of \$35 to join the General Practice, Solo & Small Firm Section. Membership expires June 30, 2016. **(Applicable to CD / Video DVD orders only)**

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Private recording of this program is not permitted. **Delivery time is 4 to 6 weeks after 6/16/16. TO ORDER AUDIO CD / VIDEO DVD OR COURSE BOOKS**, fill out the order form above, including a street address for delivery. **Please add sales tax.** Those eligible for the above mentioned fee waiver may order a complimentary audio CD in lieu of live attendance upon written request and for personal use only.

Please include sales tax unless ordering party is tax-exempt or a nonresident of Florida. If tax exempt, include documentation with the order form.

<input type="checkbox"/> COURSE BOOK ONLY (2059M) Cost \$65 plus tax (Certification/CLER credit is not awarded for the purchase of the course book only.) + TAX \$ _____ TOTAL \$ _____	<input type="checkbox"/> AUDIO CD (2059C) (includes electronic course material) \$155 plus tax (section member) \$190 plus tax (non-section member) + TAX \$ _____ TOTAL \$ _____	<input type="checkbox"/> DVD (2059D) (includes electronic course material) \$250 plus tax (section member) \$285 plus tax (non-section member) + TAX \$ _____ TOTAL \$ _____
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