



*For Florida Lawyers – By Florida Lawyers*

A JOURNAL OF THE SOLO AND SMALL FIRM SECTION

## MESSAGE FROM THE CHAIR

This year has been nothing short of AMAZING, thanks to the dedicated members of the Executive Council and the participation of the membership. We have been able to offer an innumerable amount of CLE programs and resources to support the largest sector of The Florida Bar, solo and small firm practitioners and their office staffs. The positive response from our membership and the legal community is what keeps our section striving.

### Continuing Legal Education

The Solo and Small Firm Section produced a robust series of successful CLE's this year, all offered in a virtual format only. Annually we host several signature seminars beginning with our fall 5-credit Annual Ethics Update. "Re-Imagining the Practice of Law" was offered on October 22, 2021. Last fall our half-day Agriculture Law Update—offered every other year—was postponed. Our thriving 5-credit Solo and Small Firm Conference, "Pivoting Your Law Practice: The Resilience &



JACINA PARSON,  
SOLO & SMALL FIRM SECTION CHAIR

"Grit You Need to Survive," chaired by Camara Williams and me, was presented on February 11, 2022.

After several years of Covid postponements, our ever-popular Annual Spring Trip and CLE will resume May 27-June 4, 2022, when we visit Hawaii's Big Island and the Island of Oahu. The 4-credit CLE, "Practicing the Island Way" will include specialty area topics as well as island attorneys sharing their local perspectives. Next, our full-day Florida Law Update is scheduled to be held live at The Florida Bar Annual Convention on Thursday, June 23,

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2022. This program provides 8 CLE credits on topics that include Business Law, Employment Law, Animal Law, Elder Law, Estate Planning, Criminal Law, Personal Injury Law and Real Property Law. Both the Florida Law Update and Annual Ethics Update again were well organized by Program Chair Peggy Hoyt.

In addition to our signature seminars, this is our fourth year offering monthly, noontime, one-credit InReach webinars as well as free, Wednesday Wisdom webinars for section members only. The Wednesday Wisdom webinars, of which 10 were presented this year, utilize the Zoom platform and are available on demand in the section's

members-only Facebook group. This year the section will have presented 11 one-credit InReach webinars. These webinars plus our seminars and conference continue to supplement our CLE catalog listings which, typically number about twenty programs. These combined CLE's realize strong aftermarket sales. Between the day-of revenues and aftermarket sales, the SSF Section has generated a healthy increase in CLE profits again this year.

Major kudos to Linda Calvert-Hanson and her CLE Committee members who have kept the section in the forefront of CLE innovation and offerings for our members and The Florida Bar at large.

## Section Member Services and Communications

The section maintains an active communications and marketing program aimed at increasing membership, raising the section's Bar profile and promoting registration for the section's Continuing Legal Education seminars.

## Section Services

Wednesday Wisdom. Solo and Small Firm Section members have access to monthly, free CLE through the Wednesday Wisdom Zoom webinar series—a \$500 value. CLE Committee Chair Linda Calvert-Hanson coordinates each CLE  
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## New to the Section? Welcome!

We are glad you're part of the Solo & Small Firm Section and hope that you'll get involved. The section's [website](#) contains a wealth of information including a [CLE page](#) for easy access to programs that benefit solos and small firms. We encourage you to join one of the section's [committees](#):

- Continuing Legal Education
- Marketing & Public Relations
- Outreach & Expansion
- Publications
- Sponsorship

Other ways to participate include:

- Writing an article for the LINK newsletter
- Sharing the section's social media posts
- Volunteering to make a CLE presentation



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

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# WORK LIFE BALANCE

FEATURE ARTICLE | By Aaron H. Wallace, Esq.

**Y**ears ago, I learned one of my best life lessons in my kitchen sink.

Like a lot of lawyers, I'm a highly driven multitasker with a to-do list so tall it could have its own lighting ceremony at Rockefeller Center.

Funny thing is, I keep working harder but the list doesn't seem to get shorter. Each accomplishment only opens a slot for the next task.

So when it would come to a chore as seemingly unurgent as a sink full of dirty dishes, well, all those crusty coffee mugs would just have to wait. And wait they did... until they stacked into an Empire State Building all their own. Only at the point of a full-blown Cascade crisis would I finally clear my calendar long enough to suds up the sink. Of course, "long enough" was much longer than it

needed to be, having let a simple chore fester into an Olympic game.

Finally: an epiphany. No more "I don't have time for dishes." Now, a new philosophy: **I don't have time *not* to do the dishes.**

When I take small bits of time throughout the week to tend to life's "little necessities," I find that I have more of the time, energy, and focus I need for the big things when they come around. Those nagging needs will create bigger problems if I don't give them the timely attention they require.

In a very real sense, the best thing I can do to serve my most important responsibilities is to refuse to neglect the lesser ones along the way.

Work-life balance is a lot like that. If there is one thing all we lawyers have in common, it's that we're human beings. We have basic

needs for rest, relaxation, human connection, spiritual fulfillment, and daily joy. If we short-change those things, they turn us into the emotional equivalent of an unkempt stack of sticky plates.

Earlier this year, as Director of Marketing at [Florida Lawyers Mutual](#), I had the privilege of partaking in the American Bar Association and Institute for Well-Being in Law's inaugural **Well-Being Week in Law** campaign — a weeklong effort to shine a spotlight on the glaring problems of overwork, depression, dissatisfaction, anxiety, substance dependence, and suicidal ideation in our profession.

What I learned through that process is that the lawyer wellness movement isn't just about lip service, buzzwords, and abstract inspiration. No, it's about a *fundamental paradigm shift* in the modern practice of law.

Why? Because a profession full of burned-out, bummed-out lawyers is not sustainable. It is incompatible with excellence. And it can even

**2022 Solo & Small Firm  
Section CLE Trip**

Exploring the  
Exotic State of  
**Hawaii**

MAY 27 – JUNE 4, 2022

**Solo &  
Small  
Firm**  
Section  
of THE FLORIDA BAR

pose a hazard of harm to our clients. No one is well served by a frantic, frazzled lawyer whose workload has them in over their heads.

As a lawyers' professional liability company, we at Florida Lawyers Mutual know that there is a risk management dimension to work-life balance too. A happy lawyer is a better lawyer — a more careful, attentive, and focused lawyer, less likely to make mistakes. It's one of the many reasons we champion lawyer well-being and bring that message to our members.

In fact, we just launched a new [Florida Lawyer Well-Being Resource Center](#) online, including a [music playlist](#) with 30 songs to fuel happiness, optimism, and work-life balance for Florida lawyers. Our members, who now can get all their 33 hours of CLE for free within their member-exclusive portal, also have access to HD streaming videos about lawyer well-being, mental health, and happiness. It's something that truly has become a core value of our brand.

For that matter, it really needs to become integral to *your* personal brand as a lawyer too — and to your law firm's brand as an employer, and most importantly, to your own sense of self-identity.

We can't be the lawyers we want to be if our lives are out of balance. Bringing work and life into alignment starts with a simple commitment to taking care of ourselves and honoring our humanity. Just like the mountain of mugs I used to tolerate, our

needs won't go away just because we deprioritize them. We're all better off when we recognize balance — not bombardment — as an engine for excellence.

As it turns out, there's a lot we lawyers can learn from our dirty dishes.



AARON H. WALLACE

Aaron H. Wallace, Esq. is an attorney and bestselling author who serves as Director of Marketing at Florida Lawyers Mutual Insurance Company. Created by The Florida Bar and owned by its member lawyers, Florida Lawyers Mutual provides unique benefits to its members. With high-quality policy features, a lawyer-focused approach to underwriting and claims, and an automatic cyber liability endorsement on every policy at no additional premium cost, Florida Lawyers Mutual has been the trusted choice of many Florida solo and small firm lawyers for nearly 35 years. [Learn more and get a quick quote.](#)

# IS YOUR E-MAIL ADDRESS CURRENT?



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**(WWW.FLORIDABAR.ORG) AND GO TO THE "MEMBER PROFILE" LINK UNDER "MEMBER TOOLS."**

# ETHICS QUESTIONS?

Call The Florida Bar's Ethics Hotline  
**1800-235-8619**



# I AM SOLO: BEST DECISION I EVER MADE

I AM SOLO | By Bill Curphey, Esq.

## Who is Bill Curphey?

I have been a federal and local government attorney, in house at a Fortune 200 company and an equity partner at Big Law, but enjoy best having my own small firm, although all those experiences certainly shaped my legal career. I enjoy the freedom to pick and choose the matters I work on and to hire lawyers I enjoy working with. I do miss having the IT and accounting departments and having associates to carry some of the load but manage very well with the staff I have.

## How did you get started becoming a solo practitioner?

I started my own firm on September 1, 2001, 10 days before 9-11 and thought I had made a huge mistake, that the world was going to war and everything was going to change. I had opened an office in Atlanta and could not fly there to get things started. As things happened, it was the best decision I had made for my career.

## Please tell us why becoming a solo was the best decision you made for your career...

Due to my background, my practice was mainly corporate litigation with an increasing focus on labor and employment law since so many corporate clients were being sued in that area, and I had been a Trial Attorney for the U. S. Department of Labor in my first job out of law school. I had met a client in the mid 90's who had a wage and hour case that I won and continued to represent them in all their litigation. The owner of that client needed an attorney



BILL CURPHEY



in Georgia and wanted me to represent his interests there but 1) I was not licensed in Georgia and 2) my firm did not want to open an office there (they since have). *He told me he didn't care, he wanted me to manage his legal affairs and over many conversations, kept pushing me to open my own small boutique firm with his company as its main client.*

My other reason for not wanting to open my own firm at 51 years old was that I did not want to be a business owner, dealing with renting offices, buying computers and equipment, hiring staff, billing etc. So he offered to do all that at his expense if I would just be the managing partner; he would be the office administrator and was for a number of years. Along the way, he started other companies that I also represent in Florida and Georgia and I did get licensed in Georgia.

## Are you or are you not a "people person" and how does your personality impact being a solo?

I consider myself a people person *and* an attorney and counselor at law. I counsel my clients on many major business decisions to assist in avoiding litigation. I feel being a people person also is a reason for my

success at jury trials. I am always talking to people, on a plane, in line at a store, etc., learning about them and learning to talk and listen. I also never meet clients in my office but always go to wherever they are (these are business clients) to learn their culture and how they operate.

I do not charge for a lot of this time which I could not do if I was still at Big Law where I had to meet my hourly billing goals, something I never liked. *I charge a lot of flat fees which help clients control their legal costs.* And since the pandemic, I have closed all my offices and everyone is working from home, paralegals, attorneys and staff and it has worked out so much better, having a well satisfied staff working remotely through email, texts, Facetime and zoom.

*It also allows me to travel wherever and whenever I want, staying sometimes up to a month in different places without the grind to going daily to an office or worrying about billable hours.* Now after 50 years of practice, 20 on my own, I probably bill less than 10 hours a week and the firm pretty much manages itself with little input from me but with a great staff.

*It was the best decision I ever made.*



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# TECHNOLOGY OPTIONS FOR SMALL FIRMS

By: Jan Duke, COO/a360inc

**F**or a solo practitioner or managing partner of a small firm, the topic of technology may seem intimidating and costly, but it is a necessary component to run your practice efficiently and successfully. Let's face it – technology is an integral part of our lives and when leveraged correctly, can be a game changer.

As a small firm, you may feel like having technology that competes with the large firms is impossible, but that is simply not true in today's environment. There are many options for you to have a "high tech" firm without spending a fortune.

The first step in deciding what technology tools to use is to

determine exactly what problem that you want the technology to solve. The problems usually fall into one of these categories:

## REDUCED EXPENSE

Some examples of ways that technology can reduce expenses include automating processes that were previously done manually; eliminating the expense associated with printing/copying/storing hard copy documents; moving to a cloud environment and eliminating costly servers.

## INCREASED PRODUCTIVITY

If you or your staff are performing tasks that can be

automated or wasting time searching for documents; revising documents; struggling with schedule coordination/calendaring, there are multiple tools that can help.

## FLEXIBLE WORKFORCE (REMOTE/HYBRID)

In today's post-pandemic environment, it is extremely challenging to find employees at an affordable rate for most small businesses. It is even more difficult if you do not offer the ability for remote work. Having the right technology in place can allow you to offer that option with controls in place so that you can feel comfortable.

## BUSINESS CONTINUITY PLANNING (DISASTER PREPAREDNESS)

Living in Florida, we all used

# 2022 FLORIDA LAW UPDATE

June 23, 2022

7:55 AM–4:25 PM

8 CLE Credits

Course Number 5722

7:55–8 AM Opening Remarks  
Peggy Hoyt, Program Chair

8–8:50 AM Business Law  
Clay Roesch, Orlando

8:50–9:40 AM Employment Law  
Kevin Johnson, Tampa

9:40–10:30 AM Animal Law  
Ralph DeMeo, Tallahassee

10:45–11:35 AM Elder Law  
Peggy Hoyt, Oviedo  
Alex Douglas, Orlando

11:35 AM–12:20 PM Estate Planning  
Peggy Hoyt, Oviedo  
Alex Douglas, Orlando

1:45–2:35 PM Criminal Law  
Brice Aikens, Orlando

2:35–3:25 PM Personal Injury Law  
James Gordon, Oviedo

3:35–4:25 PM Real Estate Law  
Patrick Neale, Naples

to think that a hurricane is the environmental factor that would disrupt our ability to do business as usual....and then COVID arrived. Whether it is a natural disaster like a hurricane; an accident like a fire or broken water line; or a pandemic that hits the entire world – technology is a key component of surviving and coming out of the disaster with your business intact.

**REDUCED RISK**

Even small firms have risk associated with data privacy and data security. The most likely risks surround data loss (making the mistake of storing data on a computer hard drive or paper copies and then the hard drive fries or the paper copies are destroyed/lost/compromised). By utilizing solutions that are now affordable, that risk is eliminated.

**MAKING THE MOVE:**

If you are looking for a comprehensive solution to allow your office to be virtual; have technology that allows your firm to be competitive and secure; and is scalable, below are some requirements.

1. **EMAIL & BASIC NEEDS:** One of the overall solutions I would recommend any small firm to



JAN DUKE



utilize is Microsoft Office365. It is a cloud-based (more on what “cloud” means later) platform that provides:

Email; MS Office Suite (Word, Excel, PowerPoint) and SharePoint (for file share/saving). Using a platform like O365 allows you to control the access; provide virtual connectivity (including from your iPhone/android) and also reduces risk of people only having items on their hard drive and therefore being lost if hard drive is corrupted; or lost if someone leaves and they had firm related documents stored on their device. You can also create shared email boxes or shared calendars for things court calendaring. The cost is per user/per month and can vary based on what your needs are, considering any requirements associated with your practice area.

2. **ACCOUNTING:** Most firms also need an accounting system that will allow them to truly analyze their revenue and expenses in detail. There are two systems that we typically recommend to clients, depending on level of complexity needed.

Quickbooks Online or Acumatica. Both are cloud based but provide different levels of control and security, depending on your firm’s needs.

3. **CASE MANAGEMENT SYSTEM:**

Lastly – and sometimes most importantly – a firm may need a case management system to track progress on cases; provide a concise method for conflict checks; monitor workflow/task completion; ensure work completed is billed; and possibly provide a document generation tool. Again, there are multiple options, but a strong recommendation would be going with a cloud-based (or SaaS) model so that there is no expense for hardware purchase/maintenance and no concerns with data security.

For firms that are in a practice area that has heavy reliance on workflow tracking, the system we offer (CaseAware) is a good option. However, that is overkill for many firms who just want simple time tracking or task tracking. For those firms, any of the cloud-based systems are a good option. Just make sure that they meet your needs and have flexible terms so that you can exit if you want....and MOST importantly, you must make sure that you ALWAYS own your data. Some systems to consider are: CLIO and TimeMatters.

The CLOUD Revealed – Before I leave you, I would like to share some final thoughts on the definition of “cloud” so that you can be armed with the details as you navigate your options. At its most basic definition, the “cloud” is really someone else’s computer, but, yes – it does go beyond that. The formal definition is:

- On Demand, Self Service
- Ubiquitous Network Access
- Location Transparent Resource Pooling
- Rapid Elasticity
- Measured Pay Per Use

Those words may all seem a bit confusing, but at the end of the



# UPCOMING CLE

All one-credit CLEs are 12–1 PM. One-credit live GoToWebinars are \$50 for Solo & Small Firm Section members and \$95 for non-section members. Wednesday Wisdom Zoom webinars are free for section members unless otherwise noted. Updates and registration information are available at [fsolosmallfirm.org/calendar](https://fsolosmallfirm.org/calendar).

## April 2022

**19—Exploitation Recovery Law: What Non-Elder Law Attorneys Need to Know About Protecting Vulnerable Adults.** Live GoToWebinar presented by [Shannon Miller](#), The Miller Elder Law Firm, Gainesville. Course number and 1.0 General CLE credit pending. Moderator: [Jennifer Kuyrkendall Griffin](#).

**27—Pandemic Parenting While Lawyering: Elevating your Priorities and Thriving in a Post-Covid Legal Environment.** Free Wednesday Wisdom Zoom CLE for Solo & Small Firm Section members presented by [Melissa Caballero Alton](#), Alton Law, Miami Lakes and [Samantha S. Loveland](#), Mintzer Sarowitz Zeris Ledva & Meyers LLP, Jacksonville office. Course number and 1.0 General CLE credit pending. Moderator: [Joshua Hertz](#).

## May 2022

**17—Hot Topics in Florida Legal Ethics.** Live GoToWebinar presented by [Tim Chinaris](#), Associate Dean for Information Services and Professor of Law, Belmont University College of Law, Nashville, Tennessee. Course number and 1.0 General; 1.0 Ethics CLE credit pending. Moderator: [Chris Johnson](#).

**18—Power your Firm by Understanding your Numbers: From Financial Statements and Budgets to Goal Setting.** Free Wednesday Wisdom Zoom CLE for Solo & Small Firm Section members presented by [Joy Lutz](#), CPA and Certified Tax Coach, Aligned CPA, LLC, Lake City. Course number and 1.0 General CLE credit pending. Moderator: [Joshua Hertz](#).

**May 27–June 4—Solo & Small Firm Section Annual “Out-of-Country” Trip & CLE (Hawaii).**

## June 2022

**23—Florida Law Update.** Live (in-person) during The Florida Bar Annual Convention and live GoToWebinar. Business Law Update, [Clay Roesch](#), Orlando; Employment Law Update, [Kevin Johnson](#), Tampa; Animal Law, [Ralph DeMeo](#), Tallahassee; Elder Law & Estate Planning, [Peggy Hoyt](#), Oviedo, and [Alex Douglas](#), Orlando; Criminal Law, [Brice Aikens](#), Orlando; Personal Injury Law Update, [James Gordon](#), Oviedo; Real Estate Law, [Patrick Neale](#), Naples. Course number 5722 and 8.0 General CLE credits pending. Moderator and Program Chair: [Peggy Hoyt](#).

Interested in presenting a CLE program? Please email Solo & Small Firm Section CLE Committee Chair [Linda Calvert Hanson](#). Learn more at [FLSoloSmallFirm/CLE](https://FLSoloSmallFirm/CLE).

## UPCOMING CLE, CONTINUED

### July 2022

**19—Compassionate Professionalism & Wellness: Because Mere Civility is No Longer Enough.** Live GoToWebinar presented by [Don Blackwell](#), of Counsel, Bowman and Brooke LLP, Lake Mary. Course number and 1.0 General; 1.0 Professionalism, 1.0 Mental Illness Awareness CLE credit pending. Moderator: [Cristina Alonso](#).

**27—Trust Accounting for Solo and Small Firms: How TrustBooks Can Help Streamline the Process.** Free Wednesday Wisdom Zoom CLE open to all members of The Florida Bar presented by [Rence E. Thompson](#), Upchurch, Watson, White & Max Mediation Group, Ocala; and [Tom Boyle](#), CPA and Co-founder TrustBooks, Raleigh. Course number and 1.0 General CLE credit pending.

### August 2022

**10—Professionalism Tips From the Bench.** Free Wednesday Wisdom Zoom CLE for Solo & Small Firm Section members presented by General Magistrate [Jennifer Kuyrkendall Griffin](#); other panelists to be announced. Course number and 1.0 General; 1.0 Professionalism CLE credit pending.

**16—Lessons from “50 Lessons for Happy Lawyers: Boost wellness. Build resilience. Yes, you can!”** Live GoToWebinar presented by [Nora Riva Bergman](#), JD, Tarpon Springs; and [Chelsy A. Castro](#), JD, MA, AM, LSCW, Chicago. Course number and 1.0 General; 1.0 Mental Illness Awareness CLE credit pending.

### September 2022

**20—Practice Without Borders: Using Technology to Efficiently Run Your Practice From Anywhere.** Live GoToWebinar presented by [Liz McCausland](#), Liz McCausland, P.A., Orlando, and Legal Tech Consultant, Law Tech Partners. Course number and 1.0 General; 1.0 Technology CLE credit pending.

**CLE for Solos & Small Firms**



**FLSoloSmallFirm.org/CLE**

1. Visit our [calendar](#) to register for upcoming monthly live GoToWebinars 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 Zoom 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](#).

## News for Paralegals to Use...

# WELCOME TO 2022, AND NEW BEGINNINGS!

PARALEGAL CORNER | by Priscilla Horn Warren, CP, FRP

It is our sincerest hope that your career continues to be successful and rewarding, and that we can be of assistance to you in furthering your educational and networking opportunities through membership with the Solo and Small Firm Section of The Florida Bar.



PRISCILLA HORN WARREN

The Solo and Small Firm Section hosted its annual conference on February 11, 2022. The topic was “Pivoting Your Law Practice: The Resilience & Grit You Need to Survive.” For those of you who were unable to attend the GoToWebinar, and would like more information or copies of the presentation, please contact our Section Administrator, Ricky Libbert, at [rllibert@floridabar.org](mailto:rllibert@floridabar.org) or 850-561-5631; or go to [the Solo and Small Firm Section website](#).

The last Paralegal Corner column listed the Paralegal Association of Florida’s roster for its 2022 officers. Two changes have recently been made, and were announced on February 28th by President

Kristina M. Schiraldi, MBA, ACP, FRP, as follows: Jillian Benkendorf, CP – Treasurer; and Jodee L. Buck, CP, FCP, FRP - 2nd Vice President. For more information on the State’s PAF organization, please go to [their website](#).

And for those of you who need more information on the Florida Registered Paralegal association, including designations and educational opportunities, please log into the [Florida Bar website](#) for Florida Registered Paralegals, and click on the Florida Registered Paralegal tab.

[NALA](#), the nationwide paralegal association, provides current information and/or requirements for obtaining your national Certified Paralegal designation.

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



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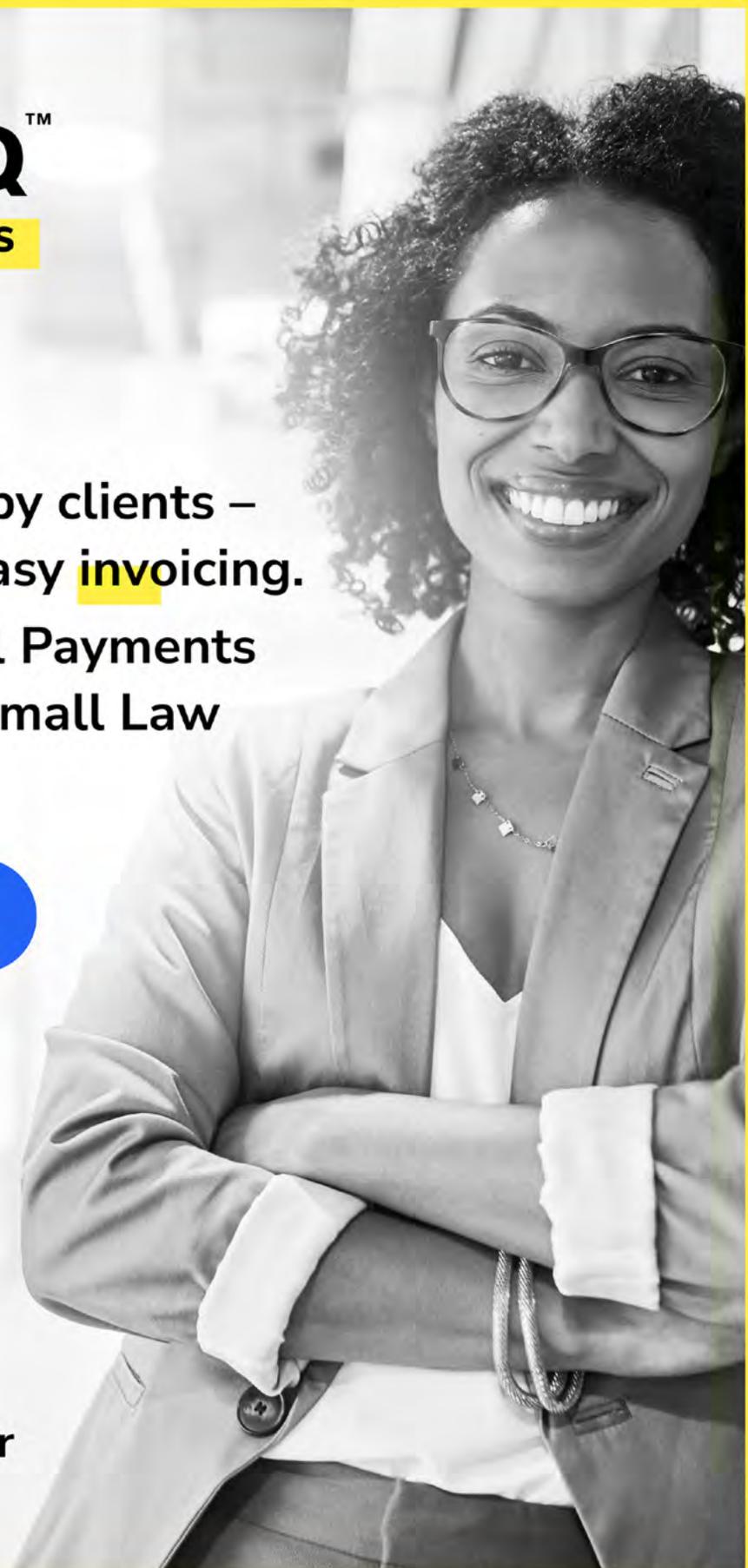
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# I AM SOLO: APRIL MARTINDALE, ESQUIRE

I AM SOLO | By Ghenete “G” Wright Muir, Esq.

April Martindale didn't initially envision herself as a solo practitioner. During her last year of law school, she was offered a position with “Big Law” contingent upon passing the Florida Bar exam. But once she passed the bar exam, and her character and fitness section was cleared, the offer was no longer there. Martindale says even though she was assured by peers that she'd be “gainfully employed in no time,” because of connections they had, no suitable prospects materialized. It was then she decided to take a leap of faith and in 2017 opened her own firm—Martindale Law in Sunrise, Florida.

Here Martindale shares more of her journey and experiences as a solo practitioner:

**What do you like best about being a solo or small firm? Please explain how you came to this type of practice and why. What do you like least?**

What I like best about being a solo or small firm is the control I have over the practice. I do not have to worry about billable hours or punching anyone's clock. I create my own schedule and can implement my ideas to improve and grow the firm to new levels to assist our clients as well as give back to the community through our non-profit efforts. In addition, I have the ability to design a happier and more productive work environment for myself and my staff.



APRIL MARTINDALE



I decided to become an Intellectual Property lawyer after studying copyright and trademark in law school. During that time, I registered over 50 of my original songs with the United States Copyright Office. These were songs I wrote back when I attended Fiorello H. LaGuardia High School of the Arts in New York. I ended up being considered an expert with IP law, lecturing for the Florida Bar, Nova Southeastern University Shepard Broad College of Law, the Broward County Office of Economic and Small Business Development, the Jim Moran Institute for Global Entrepreneurship/ Florida State University College of Business and more.

Another reason I chose IP law is that I can practice it in any state, as it is governed under federal law. So, I am licensed with the State of Florida as well as the United States District Court in the Southern District of Florida. Should I desire to move, I can still make a living on what is the main focus of my practice.

What I dislike about being a solo practitioner is that money may be inconsistent. You're not someone else's employee with a specific guaranteed income. There are times that clients will not have the means to keep up with their legal fees, especially during the COVID-19 pandemic. Entrepreneurship is risky, but the pandemic can increase that risk by volumes—but it's a risk I am glad to have taken. Every day is another adventure.

**Would you say that solo or small firm practice is a “people” practice? Are you a people person? Do you prefer working alone or with others, like a paralegal or with co-counsel?**

I wouldn't necessarily say that solo or small firm practice is a “people” practice. I think it helps if you are sociable and comfortable with others. I think it is beneficial for a firm to be a “people” practice. Once your clients can relate to you, you add value to their lives and solve their legal issues, they will return or refer business to you.

I am a leader as well as a team player. I don't mind working alone and I'm comfortable working with both paralegals and co-counsels. In fact, I was a paralegal for about 10 years before becoming a Florida licensed attorney. I have colleagues that I contract with on a co-counsel basis which is extremely helpful.



## NEED CLE CREDIT? THE SOLO & SMALL FIRM SECTION CAN PROVIDE IT 24/7 ON DEMAND!

Online seminars and downloadable audio are available through [Florida Bar InReach](#). Many CLEs are offered in CD/DVD format, too. Click [here](#) for the Solo & Small Firm Section's catalog.



### Professionalism

**5723**—Professionalism Update for Lawyers: Ways to Avoid the Disciplinary Process. F. Scott Westheimer. 1.0 General; 1.0 Professionalism credit.

**4278**—Time Management Strategies & Life Hacks for the Productive, Professional Lawyer. Melanie Griffin. 1.0 General; 1.0 Professionalism credit.

**4252**—Professionalism for Florida Attorneys. Bill Curphey. 1.0 General; 1.0 Professionalism credit.



### Ethics

**4079** —How the Ethical Lawyer Can Avoid Technology Traps. Tim Chinaris. 1.0 General; 1.0 Technology, 1.0 Ethics credit.

**5104**—How to Ethically Build a Virtual Law Firm Business Model. Kristin Tyler. 1.0 General; 1.0 Technology, 1.0 Ethics credit.

**5227**— Using Arbitration/Mediation to Accelerate Your Case: Keys to Progress. Moderator: Jake Schickel, Speakers: Christina Magee & Glenn Waldman. Co-sponsored with ADR Section. 1.0 General; .5 Ethics credit.

**5309**—Medical Marijuana & Hemp: Status in Florida of the Laws and Ethics. Tara Tedrow. 1.0 General; 1.0 Ethics credit.

**5406**—Malpractice & Ethical Perils for Law Firms to Avoid. Cathy M Sargent & Margaret Peggy Hewitt. 1.0 General; 1.0 Ethics credit.

**5705** —Ethical Trust Accounting—Would You Fear A Bar Audit? Keys to Establish, Manage & Maintain a Compliant Trust Account. Debra Davis, CPA, Esq. 1.0 General; 1.0 Ethics credit.



### Mental Illness

**5846**—10 Lessons for Happy Lawyers: Boost wellness, Build resilience. Yes, you can. Nora Bergman. 1.0 General; 1.0 Mental Illness credit.

## MORE 24/7 CLE

Online seminars and downloadable audio are available through [Florida Bar InReach](#). Many CLEs are offered in CD/DVD format, too. Click [here](#) for the Solo & Small Firm Section's catalog.



### Technology

**5673**—Microsoft Word: Pro Tips to Save you Time & Energy. Jennifer Kuyrkendall Griffin. 1.0 General; 1.0 Technology credit.

**5713**—Cyber Stalking, Revenge Porn & Victim's Rights: What All Lawyers Need to Know. Stephanie Cagnet Myron. 1.0 General; 1.0 Technology credit.

**4276**—Digital IP: Helping Clients Protect, Defend & Recover Intellectual Property Rights Online, In Social Media & E-Commerce Platforms. Luca Hickman. 1.0 General; 1.0 Technology credit.

**4277**—Practicing with the Machines: Artificial Intelligence, Automation & Technology Tools. Nicole (Niki) Black. 1.0 General; 1.0 Technology credit.

**4556**—Increase Your Law Firm Productivity and Efficiency Using Technology. Renee Thompson & Liz McCausland. 1.0 General; 1.0 Technology credit.

**4502**—Virtual Business Development –Developing Relationships, On and Offline. Frank Ramos. 1.0 General; 1.0 Technology credit.



### Multi-Credit Programs (Pricing Indicated)

**4380**—Florida Law Update 2021. Business Law Clay Roesch, Employment Law Kevin Johnson, Bankruptcy Law Kristina Feher, Elder Law & Estate Planning Peggy Hoyt & Alex Douglas, Criminal Law Brice Aikens, Personal Injury Update James Gordon, Construction Law Patrick Neale. 8.0 General credits. \$215.

**5562**—Annual Ethics Update 2021, Back to the Future: Re-imagining the Practice of Law. Professionalism in a Remote World, Scott Westheimer & Brian Tannebaum. Perspectives from the Bench—New-view and Re-view: The Ethics of Practicing Law Remotely, Judges Barbara Leach and Diana Tennis. Cyber Security & Insuring the Risks—Do You Have an Ethical Obligation to Protect your Client's Data? Daniel Whitehouse & Casey Fernandez. 5.0 General; 3.0 Ethics, 2 Professionalism and 1.0 Technology credit. \$185.

**5622** — Solo & Small Firm Annual Conference 2022, Pivoting Your Law Practice: The Resilience & Grit You Need to Survive. The Transformation of Technology Usage, Adoption & Expectations, Ari Kaplan. Bidding on Billions: Pro Tips for Working as Outside Counsel on Corporate Client Files, Diriki T. Geuka, Jennifer Branham, Shannon Finucane, Tennell Lockett. How to be Your Best Professional Self by Managing Stress with Recovery, Rebecca Bandy. Ethically Accepting Payments via Online Apps and Fee Sharing with Nonlawyers, D. Culver (Skip) Smith III. Ethical Aspects of Combining Lawyering by Day with Second Streams of Income, Camara Williams, Jordan Ostroff, Shannon Lignon, Jacina Parson. 5.0 General; 2.0 Ethics, 1.0 Professionalism, 1.0 Technology, and 1 Mental Illness Awareness credit. \$185.

## FLSoloSmallFirm/CLE

# SERVICE OF PROCESS TECHNOLOGY FOR SMALL AND SOLO PRACTITIONER FIRMS

Software that empowers small and solo practitioners to take charge of their civil process workloads.

by Mike Weaver

**R**unning a client-first company, I'm always on the lookout to see how other companies measure up and if they are "client-first." So, what could technology for small-firm or solo practitioners have to do with being "client-first"?

When I am meeting with clients, I hear the challenges they are facing post pandemic as they are growing their practices and the courts return to normal routines. The challenges span everything from navigating the new employment landscape to managing new court zoom requirements. As small-firm and solo practitioners compete in the marketplace, they are more reliant on technology to "get the job done" than ever before. Well-designed client-first technology should increase your productivity, not hinder it. We realize that your staff clearly DOES NOT need to learn yet another piece of so called "Productivity Software." You need intuitive innovative technology that helps reduce your staff's workload and increase your firm's productivity.

Most larger firms have a robust case management systems that provide workflow automation, case tracking, and accounting functionality. However, for many small and solo practitioner firms it isn't practical to operate a central case management system due to the implementation costs, need for additional dedicated staff or the case volume doesn't justify the investment. The implementation cost, need for additional dedicated staff, or they just don't have the case volume they feel justifies the investment. However, just because you are a smaller firm, that doesn't



MIKE WEAVER

mean that you or your staff can't utilize technology to manage your cases and ensure easy, distraction free, service of process. As your firm returns to normal and your case load increases, managing multiple service of process vendors across multiple venues and states while short staffed can grow into another frustrating project that you don't have staff to cover. Not to mention the challenge of tracking down returns from multiple vendors and getting those e-filed with the court in a timely fashion.

Companies, through the use of software, have solved these problems and many more by designing intuitive cloud-based service of process tools.

What could possibly be better than getting what you want before you even knew you needed it... That would be great, right?

A cloud-based service of process management system that provides the tools that small-firm and solo practitioners can leverage to manage their service of process with ease. The system not only accepts your requests, but it guides you to get the most out of the system by providing helpful updates and usage information every step of the way. After a short time, you will find that such a system is your source for all service status updates, case information,

documents, invoices and other information concerning your service requests. It automatically tracks your case load and statistics for all jobs or service requests your firm submits to 360 a process server. Once submitted each service of process request is assigned an individual tracking or job number. This occurs automatically by our system so each summons, subpoena, writ or other legal document can be tracked and updated individually until it is served.

Below are some tasks that you can easily accomplish with cloud based Service of Process Management system :

**Initiate service requests:** Easily "drag and drop" your service documents to upload your documents to our service of process platform.

**Monitor service requests in real time:** Know the exact status of your service requests 24/7/365.

**View and download:** All case related documents; all documents you upload to us or we generate, are maintained for you in our system. You can download returns of service, upload new service requests or supplemental documents.

**Update Special Service Rules:** Verifying your case venue to ensure proper court selection.

**Manage Service Costs:** No more wasted service fees on incorrect addresses. due to automatic verification via a database.

**Real-time vendor report card:** Know your service metrics at a glance.

There are additional tools to use

>> **PROCESS** PAGE 20

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# LESSON 1: LIKE THE LAW, HAPPINESS IS A PRACTICE

By Nora Bergman and Chelsy Castro

**I believe that the very purpose of our life is to seek happiness.**

– *Dalai Lama*

**A**t one time or another we've all had the same thought. "I'll be happy when [fill in the blank]." For some reason we have been conditioned to believe that happiness is the result of something happening to us or something we achieve. But that is not how happiness works. Or maybe we've been conditioned to believe that if we have a certain amount of money or a bigger house or a new car or a better job, then we will be happy. But that is also not how happiness works.

There are so many people who, by all outward appearances, should be happy. Yet on the inside, they are suffering. In the legal profession, the pain of unhappiness is almost endemic. Research has shown that attorneys experience depression at a higher rate than the general public. Given the stress that is so often part of the practice of law, it's not surprising that too many attorneys suffer from depression. If you are suffering from depression, this book is not a substitute for professional help. However, learning how to increase the happiness you experience

– regardless of where you are in your life – can be invaluable.

## WHAT IS HAPPINESS?

First, let's define happiness. According to the Merriam-Webster Dictionary, happiness is "a state of well-being and contentment." According to Sonja Lyubomirsky, a professor in the Department of Psychology at the University of California, Riverside, happiness encompasses both positive emotions and a sense of satisfaction. So, let's go back to that definition. The truth is that while there may be common components of happiness, those components may differ from person-to-person.

In her book, *The How of Happiness: A Scientific Approach to Getting the Life You Want*,<sup>[1:1]</sup> Lyubomirsky shares her research on happiness and some of the myths around it. She notes three factors that determine our level of happiness: Set Point, Circumstances, and Intentional Activity. Our Set Point, which accounts for about 50 percent of our happiness, is rooted in our genetics. Circumstances – what happens to us – account for only about 10 percent of our happiness. The remaining 40 percent of our happiness in life is determined by our Intentional Activity. Yes, we can increase the level of happiness in our lives by

intentionally doing those things that make us feel happy. So simple. Yet, simple doesn't necessarily mean easy. She describes her research based on studies of twins. We won't go into it here, but we highly recommend reading her book.

## HAPPINESS IS NOT TOXIC POSITIVITY

Toxic positivity is defined as only focusing on positive things and rejecting anything that may trigger negative emotions. There is a difference between maintaining a positive mindset in the face of challenges and avoiding those challenges or pretending they don't exist. If there are weeds in your garden, a positive mindset doesn't tell you to just ignore them or pretend they are not there. If you have a positive mindset, you notice the weeds and get busy pulling them out. You have a mindset that says, "I see the weeds. I know they are not good for my garden. And I'm going to deal with them." Practicing happiness is not about denying or avoiding unpleasant emotions or circumstances, rather it's about how we respond to those problems and challenges.

As you'll learn in the lesson on mindfulness, denying our emotions only makes them stronger. And, as you'll learn in the lesson on empathy, being able to feel what someone else is feeling can actually serve to increase your happiness and theirs. This may be particularly true when you can empathize with someone who is feeling painful emotions.

## WHY PRACTICE HAPPINESS?

In Shawn Achor's book, *The Happiness Advantage: The Seven Principles of Positive Psychology*

That Fuel Success and Performance at Work, [1:2] he shares research from numerous studies demonstrating that when we are happy and in a positive state of mind we are better able to “make and sustain more neural connections, which allows us to think more quickly and creatively, become more skilled at complex analysis and problem solving, and see and invent new ways of doing things.”

The bottom line is that being happier will make you a better lawyer. Yet, when you think of your typical day, how often do you feel happy? How often do you feel positive emotions? The work lawyers do – identifying problems, spotting issues, playing out worst case scenarios – can lead to an overdose of negative emotions, but your brain needs the exact opposite to be at its creative best.

**Waiting to be happy limits our brain’s potential for success, whereas cultivating positive brains makes us more motivated, efficient, resilient, creative, and productive, which drives performance upward.**

– From *The Happiness Advantage*

In addition to making you a better lawyer, being happy has many other documented benefits. According to research from the Greater Good Center at UC Berkeley, happiness benefits your health in the following six, very specific ways: [1:3]

- Happiness promotes lower heart rate and blood pressure.
- Happiness strengthens your immune system.
- Happiness can reduce stress.
- Happiness can help to reduce pain and inflammation.
- Happiness combats disease and disability.
- Happiness lengthens our lives.

## **HAPPINESS SUPPORTS WELLNESS AND CULTIVATES RESILIENCE**

Happiness, wellness, and resilience all work together to enhance our quality of life. Each concept builds on and supports the others. Each concept needs the others, and we need all three to be at our best. While being healthy and physically well can certainly make you feel happy, it’s also true that experiencing happiness can improve your health. And being happy – feeling positive emotions – can help us to be more resilient. We’ll talk more about resilience in Lesson 3, but for now just know that when we are resilient, we can bounce back more easily from difficult situations. Whether the difficult situation is a ruling you didn’t expect in one of your cases, a challenge with a client, or a diagnosis you didn’t expect from your doctor, our level of resilience makes all the difference in how we respond.

### **PRACTICE. PRACTICE. PRACTICE.**

So, now you know what happiness is and why it’s important for your work and your quality of life. Increasing your happiness is all about doing things that make you feel happy. We’re not suggesting you can flip a switch and become happier. We are suggesting that small changes every day can make a big difference in how happy you feel. Just like the law, happiness is a practice. And while practice may not make perfect, it does make permanent.

**If we observe genuinely happy people, we shall find that they do not just sit around being contented. They make things happen. They pursue new understandings, seek new achievements, and control their thoughts and feelings. In sum, our intentional, effortful activities have a powerful**

**effect on how happy we are, over and above the effects of our set points and the circumstances in which we find ourselves. If an unhappy person wants to experience interest, enthusiasm, contentment, peace, and joy, he or she can make it happen by learning the habits of a happy person.**

– From *The How of Happiness*

The lessons that follow offer a variety of ways to begin your happiness practice. You don’t have to make all of them part of your practice, although you could! Pick one, two, or three and experiment with them. Make a conscious effort to practice happiness by doing those things every day.

## **LIVING THE LESSON**

Make a commitment to practice happiness.

Pick one, two, or three of the lessons in this book and practice them every day. If you need to, put a reminder in your calendar or on your phone. Do it! Sometimes we need support in creating new habits. That’s okay.

Keep a journal. Notice if what you are doing is helping to increase your happiness. If it’s not, experiment with another Lesson.

Be kind to yourself. Don’t beat yourself up if you miss a day in your practice. Changing our behavior isn’t easy – even when we really want to change.

For more information, please see *50 Lessons For Happy Lawyers*, and for information on purchasing the book, please see [this link](#). 

[1:1] Lyubomirsky, Sonja.(2008). *The How of Happiness: A Scientific Approach to Getting the Life You Want*. Penguin Books.

[1:2] Achor, Shawn. (2010). The Happiness Advantage: The Seven Principles of Positive Psychology That Fuel Success and Performance at Work. Crown Business.

[1:3] Newman, Kira. (2015). "Six Ways Happiness Is Good for Your Health." Greater Good Magazine. July 28, 2015.



NORA BERGMAN

Nora Bergman is the creator of the 50 Lessons for Lawyers book series designed to support lawyers throughout every stage of their careers. A licensed attorney since 1992, Nora has been a Certified Atticus Practice Advisor since

2006. She has coached lawyers across the country and brings a deep understanding of the practice and business of law to her work with lawyers, law firms, and bar associations. Before her work as an author and business coach, she practiced as an employment law attorney and certified mediator and has served as an adjunct professor at both Stetson University College of Law and the University of South Florida.



Chelsy Castro is CEO and Founder of Castro Jacobs Psychotherapy and Consulting (CJPC), a firm specializing in lawyer well-being. An attorney turned psychotherapist and performance coach, Chelsy counsels individuals and the organizations they work for on how to achieve their goals in healthy and productive ways. Chelsy's publications and



CHELSEY CASTRO

trainings focus on science-based skills and strategies for improving performance and increasing well-being in high-pressure professions.

After practicing law as a multilingual attorney in the field of international regulatory compliance, Chelsy later earned her clinical degree at the University of Chicago and shifted her focus to lawyer well-being. Prior to launching CJPC, Chelsy designed, developed, and managed clinical programs for the legal profession, and provided evidence-based psychotherapy and training for lawyers, judges, and law students.

<< **PROCESS** PAGE 16

along with this system, namely apps that are locally installed on your desktop and enables secure encrypted drag and drop service request submission from your desktop. Once submitted, the documents are automatically and securely transmitted directly to our service of process management system and routed for service. What is even better is that these apps integrate with native Windows notifications to keep your staff automatically updated on the status of your service requests as they occur.

Built on industry standard technology, these systems are available for multiple platforms. Manage your cases from the cloud, desktop, or mobile with ease.

These systems allow attorneys and firms to monitor critical deadlines and critical service metrics. Innovative process servicing companies begin with the end in mind, allowing you to manage your client's case load and get your papers served while managing critical cost and vendor management requirements.



Mr. Weaver is the founder of 360 Legal, Inc. a National Legal Service firm based in Sarasota Florida, that provides nationwide service of process, investigations, efilings, automation, consulting, and other legal services to law firms and solo practitioners. He is instrumental in focusing the team at 360 Legal to deliver industry

leading Client First customer service, based on a set of guiding principles we call The Code. Mr. Weaver guides the strategic direction of the company and is responsible for the company's day-to-day operations and business development objectives. He also guides the company's technology development efforts and direction.

Mr. Weaver has two children: Ellen 30, and Thomas 28. He enjoys using his private pilot license and is active in many outdoor activities. He attended Virginia Polytechnic Institute and State University and graduated with two Bachelor of Science Degrees and a minor in computer science.

<< CHAIR PAGE 2

program and Executive Council member Joshua Hertz moderates. The CLEs are available in the section's members-only Facebook group video library—available 24/7 to members—until their credit-approval expiration dates.

**Members-Only Facebook Group.** The section offers its members the chance to network, gain access to free CLE programming, and receive early notifications about CLE registration through its closed Facebook group. Section members can ask questions, seek and give

referrals, and share insights, and more.

**LAWCLERK.** Through the efforts of Section Chair-Elect Chris Johnson, the Solo and Small Firm Section has a partnership with LAWCLERK, an online legal freelance marketplace. LAWCLERK connects hiring attorneys with an extensive, nationwide network of over 3,400 freelance lawyers. Solo and Small Firm Section members now can sign up as freelance attorneys and can earn rebates when they hire freelance attorneys

through LAWCLERK; the section receives a share of the revenue for each member who signs up and uses an account.

**Monthly Mindfulness Meditation.** This new, telephonic wellness initiative is offered by section member Adam Myron. Our members are encouraged to close their door, dial in anonymously and spend 10 minutes letting go and relaxing to achieve greater well-being.

**MOVING?**  
Need to update your address?

The Florida Bar's **website** 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."

**Are you Getting the Smartest Tax Advice?**  
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## Communications

**How to Solo Small Firm.** The section recently launched a new series of tips on best practices for how to run small law firms. Experienced solo and small-firm attorneys share their insights on technology, marketing, apps, client management, personnel, professionalism, and more. Each of the “How to Solo Small Firm” videos are available on the section’s website, on YouTube and on social media with the hashtag #HowToSoloSmallFirm. The section’s goal for the series is for it to become a trusted resource for attorneys when they have practice management issues that are unique to solo and small firms

**Social Media.** The section continues to expand its reach through active social media profiles, which include Facebook (1,945 followers), a members-only Facebook group (435 members), a LinkedIn group (696 members), Twitter (2,533 followers) and Instagram (added February 2021; 262 followers). The section’s social media profiles have strong synergy with profiles of The

Florida Bar, other sections, and legal-community entities.

**Publications.** Under the leadership of Publications Committee Chair Michelle Garcia Gilbert, the section disseminates QuickLINK, a bi-monthly electronic newsletter containing CLE promotions, practice tips, legal-community news and more—content that is relevant to a solo or small firm practitioner. QuickLINK content also appears on the section’s website blog. Section members also receive the triannual *LINK*, a more expansive publication covering topics dedicated to solo and small firm practitioners, including feature articles and section news.

**Website.** The section offers a CLE page that offers four ways to access section CLE offerings. In addition, the calendar page provides course descriptions and registration links so that members and others who are interested may easily find CLE opportunities. The annual solo and small firm conference also has a feature page on the website.

**Publicity.** The section regularly sends content to The Florida

Bar News for publication: Announcements, calls for nominations, section news, awards, etc.

## Sponsorship Committee

Cristina Alonso and her Sponsorship Committee have expanded our sponsors this year. We would like to express our sincere appreciation for the Solo and Small Firm Section’s 2021-22 sponsors. Section Annual Sponsors are MONE\$Q, Florida Lawyers Mutual Insurance Company and Clio. Tabs3 was a Section Friend during the first half of the bar year. Our Section Supporter for the second half of the bar year is Aligned CPA, LLC. We thank each of them for their support and service to our members.

As a result of the hard work of everyone mentioned here, all of the members and liaisons of the Executive Council, Program Administrator Ricky Libbert, and Lisa Tipton, our publicity, marketing and public relations consultant, our membership has continued to grow and we look forward to meeting their continuing needs.



## << TECHNOLOGY PAGE 8

day, what is most important to understand is that the cloud is the future but there are also risks associated with it, just like the risks you face if you have a server in your closet in your office. So – you need to do your homework; ensure you are selecting a provider that is reputable and can provide the level of support you need. Lastly – you need to make sure you understand who owns the data and how you can get the data back if you ever leave them.

Please contact me if you have any questions as you

navigate the future of tech in your firm! My contact information is [jan.duke@a360inc.com](mailto:jan.duke@a360inc.com)



Jan Duke is the COO and lead consultant at a360inc. In this capacity, she provides strategic leadership for the company and utilizes her extensive industry experience to create customized solutions to resolve operational challenges for clients. Her primary focus is consulting in the areas of technology solutions, organizational structure, and

business-process improvement. She also oversees business development efforts, product management, and solutions delivery. Jan began her career in the consumer-packaged goods industry and later moved to the legal field where she has held senior leadership positions in human resources, information technology, support services, operations management, and compliance. With 20 years of experience in the industry, she can leverage her knowledge to assist client firms in meeting their performance and fiscal objectives.



## PIVOTING YOUR LAW PRACTICE: The Resilience & Grit You Need to Survive

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"Pivoting Your Law Practice: The Resilience & Grit You Need to Survive" is designed to meet the needs of solos and small firms who understand the importance of transforming their law practices to address the new demands of virtual and hybrid business models.

Our diverse roster of presenters addresses technology transformations, working as outside counsel, managing stress with recovery, online payment systems, and managing the ethics of law and second income streams.

If you have questions, please contact Solo & Small Firm Section Program Administrator Ricky Libbert at [rllibbert@floridabar.org](mailto:rllibbert@floridabar.org) or (850) 561-5631.

Conference Chair  
Jacina Parson  
2021-22 Solo & Small  
Firm Section Chair



Conference Vice-Chair  
Camara Williams  
2021-22 Solo & Small  
Firm Section EC Member

### Pivoting Your Practice Segments & Presenters

#### Welcome

Solo & Small Firm Section Chair and Conference Chair Jacina Parson and Vice-Chair Camara Williams with Florida Bar President Michael Tanner (video)

#### The Transformation of Technology Usage, Adoption, and Expectations

Ari Kaplan, Ari Kaplan Advisors of New York

#### Bidding on Billions: Pro Tips for Working as Outside Counsel on Corporate Client Files

Panel discussion moderated by Diriki T. Geuka, Associate, Townsend Lockett, LLC, Atlanta

Panelists: Jennifer Branham, Director & Corporate Counsel, L3Harris Technologies, Inc., Melbourne; Shannon Finucane, Director of Legal Business Affairs, Hornets Sports and Entertainment, Charlotte, NC; D. Tennell Lockett, Managing Partner, Townsend & Lockett, LLC, Atlanta

#### The How to Be Your Best Professional Self by Managing Stress With Recovery

Rebecca Bandy, Director of the Henry Latimer Center for Professionalism The Florida Bar, Tallahassee

#### Break

#### Ethically Accepting Payments via Online Apps and Fee-Sharing with Nonlawyers

D. Culver (Skip) Smith III, Culver Smith, III, P.A., West Palm Beach

#### Ethical Aspects of Combining Lawyering by Day with Second Streams of Income

Panel discussion moderated by Camara Williams, Smith and Williams Trial Group, PLLC, Orlando

Panelists: Jordan Ostroff, President, LegalEase Marketing; Managing Partner, Jordan Law, Orlando; Shannon A. Ligon, Attorney, Ligon Law Group, LLC d.b.a. PrettySMART Law | PrettySMART, LLC | Legacy Entertainment & Arts Foundation Inc. (L.E.A.F. Inc.), Miami; Jacina Parson, Chair, Solo & Small Firm Section; Senior Assistant County Attorney, Pinellas County Attorney's Office; Realtor, Coldwell Banker, Clearwater

5.0 General CLE Credits; 2.0 of which may be applied toward Ethics, 1.0 of which may be applied toward Professionalism;  
1.0 Technology, 1.0 Mental Illness Awareness Section Members \$185 · Non-Section Members \$230

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