



Small Firm Management: Budgeting, Advertising & Financial Practices in the Digital Workplace

November 13, 2019

1:00 p.m. – 3:30 p.m. (12:30 Lunch/registration/check-in)

BAEC, 438 Main St., Sun Room Auditorium, Buffalo

2.5 CLE credits: 1.0 Ethics, 1.5 Law Practice Management (approved for all attorneys)

- 12:30 p.m.** **Check-in/Lunch** generously sponsored by Evans Bank, Smith.ai, and Veritas Law Firm Marketing
- 1:00 p.m.** **Welcome and Introduction**
Michael Woods, *Business Development Manager, Assistant Vice President, Evans Bank*
- 1:05 p.m.** **Ethical Obligations with Attorney Advertising: Do's and Don'ts**
David G. Brock, Esq., *Kavinoky Cook LLP*
- Howard B. Cohen, Esq., *Gross Shuman, P.C.*
- Geron Evanson, *Veritas Law Firm Marketing*
- 2:05 p.m.** **Five Ways to Maximize your Profit Margins**
- credit cards
 - consults
 - automated invoices & reminders
 - outsourced collections without the hefty fees
 - proper task delegation
- Maddy Martin, *Head of Growth and Education, Smith.ai*
- 2:55 p.m.** **Properly Handling Your Clients Money and Your Firm's Assets: IOLA/Trust Accounts and Billing Issues**
David G. Brock, Esq., *Kavinoky Cook LLP*
- Howard B. Cohen, Esq., *Gross Shuman, P.C.*
- 3:20 p.m.** **Establishing and Utilizing a Line of Credit**
Michael Woods, *Business Development Manager, Assistant Vice President, Evans Bank*
- 3:30 p.m.** **Q&A/Adjourn**

**Erie Institute of Law Registration Form -
Small Firm Management: Budgeting, Advertising, & Financial Practices in the Digital Workplace**

\$55 BAEC Member

\$85 Non-Member

\$5 Hard copy of material

The Erie Institute now provides material via electronic delivery. Please be sure to add your email address below. If you prefer a hard copy, check the box above and add \$5 to the registration fee. Thank you.



Name _____

Firm _____

Address _____

City _____ State _____

Zip _____ Phone _____ Fax _____

E-mail _____

Enclosed is my check in the amount of \$_____ Visa MC

Card Number _____ Exp. Date _____

Cardholder Signature _____

Accreditation: The Erie Institute of Law has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the state of New York.

Cancellation Policy: If you are unable to attend a seminar for which you have already registered, call the CLE department at 852-8687. For a full refund, notice of your cancellation must be received 48 hours in advance of a program. **Cancellations received less than 48 hours in advance are subject to a \$5 administrative fee.** Registrants who are pre-registered and fail to attend will receive course materials in lieu of a refund.

Mail or scan: Erie Institute of Law, 438 Main Street, Sixth Floor, Buffalo, New York 14202, (716) 852-8687, or scan to cwalsh@eriebar.org. Register online at www.eriebar.org. Walk-in registrants add \$5 to registration fee. Tuition assistance available. Please call to request an application.