LAW FIRM FINANCIAL MANAGEMENT
CONFERENCE AND EXPOSITION
The Premier Financial Management Conference for the Legal Community

October 16-18, 2008 • Renaissance Schaumburg Hotel & Convention Center • Schaumburg, Illinois

Educational Conference Highlights and Learning Goals

Among the many exciting educational offerings at this conference, find out how to:

• Implement innovative strategies for managing accounts receivable
• Assess your firm’s vulnerability to fraud and embezzlement
• Implement proven measures for retaining your associate level talent
• Uncover multiple strategies to improve your firm’s bottom line
• Effectively lead and manage the 21st century law firm in an increasingly competitive landscape

SAV E $100! 
Register on or before September 19, 2008

www.alanet.org/finance
Hotel Information

This year’s Law Firm Financial Management Conference & Exposition will be held at the Renaissance Schaumburg Hotel & Convention Center in Schaumburg, Illinois, on October 16, 17, and 18. Conveniently located, the hotel is approximately 12 miles from O’Hare International Airport, 32 miles from Chicago Midway Airport, and 30 miles from downtown Chicago. Woodfield Mall and the Streets of Woodfield are close by for world-class shopping and dining, and ALA has arranged for evening bus service to the best Chicago-style restaurants (and this is the best part) located in Schaumburg, Illinois.

The hotel boasts a contemporary design that is expressive, yet functional, and blends the futuristic architecture with a heightened appreciation for the surrounding natural wetlands. In addition to what you’ve come to expect from a luxury hotel, its amenities include wireless high-speed Internet access, a well-equipped fitness center, and Sam & Harry’s, a steak and seafood restaurant.

**Reservations:** Contact the Reservation Department directly at (800) 468-3571 or (847) 303-4100 and reference the Association of Legal Administrators Finance Conference to be eligible for the ALA discounted group rate. Reservations must be accompanied by a first night’s deposit and received by the hotel’s Reservation Department on or before Wednesday, September 17 to be eligible for the special rate, and are accepted on a first-come, first-served basis. Rooms will be available on a space-available basis at the prevailing rates after September 17.

**Hotel Cancellations:** If you need to cancel your hotel reservations, please do so by calling the hotel directly. Any room reservations canceled within 24 hours of your arrival date will result in the forfeiture of one night’s room and tax.

**Parking:** Valet parking is available for $10 on a short-term basis, and $14 overnight. Self parking is available at the hotel at no charge.

**Ground Transportation:** When you arrive at O’Hare International Airport or Midway Airport, call American Taxi at (847) 352-4411 and request a suburban taxi. Be forewarned – the taxis sitting at the curb are usually designated for trips into Chicago, and they may be unfamiliar with suburban locations. The trip should take 25 to 30 minutes from O’Hare to the Renaissance Hotel ($65), or about one hour from Midway Airport ($75).

Limousine service is available through A Touch of Class Limousine. A shared ride will cost $38+ gratuity each way. To make a reservation, call (847) 888-8686.

ALA has arranged special hotel room rates at the Renaissance Schaumburg Hotel especially for you:

- $119 single/double*
- $139 triple/quad*
- Upgrade to the Concierge level for an additional $20 per night

*All room rates are subject to 14% occupancy tax. Reservations are accepted on a first-come, first-served basis.

**Renaissance Schaumburg Hotel & Convention Center**
1551 N. Thoreau Drive
Schaumburg, IL 60173

Reservation Department:
(800) 468-3571 or (847) 303-4100

Check in 4 p.m.
Check out Noon

www.renaissanceschaumburg.com

**Exhibit Hall**

Be sure to visit the Exhibit Hall where each and every vendor is ready to share their strategic solutions to help you run your law firm or legal department more effectively.

The Exhibit Hall is where connections are made, new suppliers are found, and important new trends are discovered. Take advantage of this unique opportunity to see and touch the industry’s latest products and services all in one place.

Please stop by the Exhibit Hall on Friday to see what’s new, and visit with your partners in business - ALA exhibitors and sponsors.

**Exhibit Hall hours are from**
10 a.m. to 3:30 p.m.
Friday, October 17.

www.alanet.org/finance
Dear Colleague,

What really drives your firm's bottom line? Do you have the tools to stay competitive? How vulnerable is your firm to fraud and embezzlement? The answers to these questions, and many more, are at this year's annual ALA Law Firm Financial Management Conference & Exposition, October 16-18, 2008, in Schaumburg, IL (the best Chicago has to offer without the big city stress).

With its meaty content and thoughtful analyses of information critical to all who are involved in financial management, this year's conference promises to blow the lid off all others. A partial list of sessions includes:

- Financial Management 101: Setting Up the Financial Function
- Excel(lent) Techniques for using Spreadsheet Applications
- Insurance Auditing: Optimizing Your Strategic Risk Management Processes
- HRAs & HSAs: Integrating Your Options
- Information Technology: Evaluating Financial Systems

Now in its fifth year, the Conference is specifically tailored for principal administrators, controllers, accounting managers, and branch office managers from small- to medium-size firms, including those relatively new to the legal industry. The Law Firm Financial Management Conference & Exposition provides the education necessary for the future success and profitability of your firm, and is the preeminent platform for your personal and professional growth. A wide variety of topics will be presented by experts in their field, to an audience that spans the novice to the seasoned administrator who wants to brush up on specific financial skills. Educational tracks offer exploration of topics for those interested in depth, as well as breadth, of material. Also encouraged to attend are managing partners and attorneys responsible for the financial management aspects of their firms.

Please come for the education but also avail yourselves of world-class networking opportunities with your peers, legal industry colleagues, and your partners in business — vendors ready to share strategic solutions at the Exhibit Hall.

The conference offers up to 17 hours of CPE-eligible education, multiple sessions that will assist you in meeting the educational requirements of the Certified Legal Manager (CLM)℠ designation, and numerous sessions that are eligible for CEUs for HR through HRCI.

Watch your mail and the ALA Web site (www.alanet.org/finance) for more information about this premier financial conference specifically addressing your needs and wants.

I look forward to seeing you at the Conference.

Brian A Robbins, CLM, CPA
Committee Chair

Optional Nights Out on the Town

**Thursday, October 16, 2008**
Today is all about you! After an enriching day of stimulating educational offerings, let ALA's private shuttle whisk you away to The Streets of Woodfield and the Woodfield Mall. It's here you'll find trendy and timeless shopping, inviting restaurants, and the Improv Comedy Club. Just minutes from the Renaissance Schaumburg Hotel & Convention Center, Woodfield has everything you need to create your own perfect evening.

**Friday, October 17, 2008**
Downtown Chicago has many wonderful restaurants, like Morton's Steakhouse, Shaw's Crab House, and Tony Bennett's favorite haunt — Rosebud. But you don't have to travel 30 miles in rush hour traffic to experience these incredible eateries. Schaumburg is home to all of these restaurants and many more. On Friday, you'll be able to peruse menus and choose your destination for a self-funded dinner. ALA will provide transportation to a select number of local "Chicago" dining options. The plan for this evening is up to you.
Professional Education Credits

Certified Legal Manager (CLM)SM
All applicants for the CLM program must meet certain education prerequisites before sitting for the CLM exam. At this conference there are one or more sessions that will assist you in meeting the educational prerequisite requirements. All such sessions have been clearly labeled with the CLM logo.

CLE/CPE Credit
The Association of Legal Administrators certifies that the Law Firm Financial Management Conference & Exposition has been approved for MCLE credit by the State Bar of California in the amount up to 14.5 hours in law practice management.

MCLE/Other States
Credit may be available in other states, but cannot be guaranteed. In all states, accreditation is dependent on individual state guidelines and filing regulations. To request that application be made to a specific state, mark the box “I am requesting MCLE credit in” on the Conference Registration Form. In all states, accreditation is dependent on individual state guidelines and regulations.

The Association of Legal Administrators is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to:

National Registry of CPE Sponsors
150 Fourth Avenue North, Suite 700
Nashville, TN 37219-2417
Web site: www.nasba.org

This program is eligible for a maximum of 17 hours of CPE credit. This program is a Group-live offering.

CPE Fields of Study:
NASBA approves CPE credit for accountants in twenty-three subject matter areas representing the primary knowledge and skill areas needed by accounting licensees to perform professional services: Accounting, Accounting (Governmental), Auditing, Auditing (Governmental), Administrative Practice, Social Environment of Business, Regulatory Ethics, Business Law, Business Management and Organization, Finance, Management Advisory Services, Marketing, Behavioral Ethics, Communications, Personal Development, Personnel/HR, Computer Science, Economics, Mathematics, Production, Specialized Knowledge and Applications, Statistics, and Taxes.

CPE Codes and Descriptions:
All CPE eligible courses are identified by the following codes and/or descriptions.

• Length of Instruction in Minutes
• Field of Study Covered
• Audience Level (B = Basic, I = Intermediate, A = Advanced)
• Audience: The type of prior preparation in experience, skills, and/or education necessary for optimal learning outcomes.

Sign in/sign out sheets will be provided in sessions (except Roundtables or Idea Exchanges) for those seeking CPE credit.

Human Resources Professionals
This program has been approved for recertification credit hours toward PHR and SPHR recertification through the Human Resource Certification Institute (HRCI). For more information about certification or recertification, please visit the HRCI homepage at www.hrci.org.

* CLM is a service mark of the Association of Legal Administrators

Session Format Descriptions

Mini-Series - Profitability
The Profitability Mini-Series focuses on the fundamental principles of actualizing optimal profits by looking at two key aspects of today’s firm: (1) client and partner profitability and (2) information technology (IT) cost recovery processes. By the end of the series, participants should be able to:

• Implement best practices for optimizing profitability
• Creatively leverage client and attorney profitability to improve the firm’s overall bottom line
• Calculate short-term and long-term costs of improving technologies
• Implement proven methods for recovering IT costs

Mini-Series - Advanced Tips & Techniques
The Advanced Tips & Techniques Mini-Series focuses on advanced techniques for use with Microsoft Excel® and Outlook® to increase personal levels of efficiency and organization and generate meaningful data. By the end of the series, participants should be able to:

• Use and integrate the full range of features Outlook offers
• Configure and customize Outlook to meet business needs more effectively
• Integrate Outlook with remote and/or mobile technology
• Report and summarize huge amounts of data in Excel with Pivot Tables
• Set up reliable data validation in spreadsheet applications

Extended Session
The extended session, How to Measure Anything: You Can't Play the Game if You Don't Know the Score, focuses on determining where a firm is at any given point by implementing a variety of measurements and analyzing the results. During the workshop participants review and use a range of performance measurements and indicators standard to the measurement of processes, milestones, benchmarks, projections, and outcomes. Topics discussed in this session include measuring elements such as financial plan and practice area performance, billing rate profitability, extended payments and future values, expenses, ownership interests, attorney performance, and the effects of new hires.

www.alanet.org/finance
# 2008 Law Firm Financial Management Conference & Exposition

## Schedule of Events

<table>
<thead>
<tr>
<th>Thursday, October 16</th>
<th>Friday, October 17</th>
<th>Saturday, October 18</th>
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</thead>
<tbody>
<tr>
<td>7 a.m. - 5:45 p.m.</td>
<td>7 a.m. - 5 p.m.</td>
<td>7:30 a.m. - Noon</td>
</tr>
<tr>
<td>Registration</td>
<td>Registration</td>
<td>Registration</td>
</tr>
<tr>
<td>7:30 - 8:30 a.m.</td>
<td>7:30 - 8:30 a.m.</td>
<td>7:30 - 8:30 a.m.</td>
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<tr>
<td>Continental Breakfast</td>
<td>Continental Breakfast</td>
<td>Continental Breakfast &amp; Roundtable Discussions</td>
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<tr>
<td>8:30 - 10 a.m.</td>
<td>8:30 - 10 a.m.</td>
<td>8:30 - 9:30 a.m.</td>
</tr>
<tr>
<td>Welcome &amp; Keynote Speaker</td>
<td>General Session</td>
<td>Concurrent Sessions</td>
</tr>
<tr>
<td>10 - 10:30 a.m.</td>
<td>10 a.m. - 3:30 p.m.</td>
<td>8:30 - 10:40 a.m.</td>
</tr>
<tr>
<td>Beverage Break</td>
<td>Exhibit Hall Open</td>
<td>Extended Session</td>
</tr>
<tr>
<td>10:30 a.m. - Noon</td>
<td>10 - 10:45 a.m.</td>
<td>9:30 - 9:40 a.m.</td>
</tr>
<tr>
<td>Concurrent Sessions</td>
<td>Break in Exhibit Hall</td>
<td>Beverage Break</td>
</tr>
<tr>
<td>Noon - 1:30 p.m.</td>
<td>10:45 a.m. - Noon</td>
<td>9:40 - 10:40 a.m.</td>
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<tr>
<td>Lunch and ALA Insights</td>
<td>Concurrent Sessions</td>
<td>Concurrent Sessions</td>
</tr>
<tr>
<td>1:30 - 2:30 p.m.</td>
<td>Noon - 1:30 p.m.</td>
<td>10:40 - 10:50 a.m.</td>
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<tr>
<td>Concurrent Sessions</td>
<td>Lunch in Exhibit Hall</td>
<td>Beverage Break</td>
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<tr>
<td>2:30 - 3 p.m.</td>
<td>1:30 - 2:45 p.m.</td>
<td>10:50 a.m. - Noon</td>
</tr>
<tr>
<td>Beverage Break</td>
<td>Concurrent Sessions</td>
<td>Closing General Session</td>
</tr>
<tr>
<td>3 - 4:15 p.m.</td>
<td>2:45 - 3:30 p.m.</td>
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<tr>
<td>Concurrent Sessions</td>
<td>Break in Exhibit Hall</td>
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<tr>
<td>4:15 - 4:30 p.m.</td>
<td>3:30 - 5 p.m.</td>
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<tr>
<td>Beverage Break</td>
<td>Concurrent Sessions</td>
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<tr>
<td>4:30 - 5:45 p.m.</td>
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<tr>
<td>Concurrent Sessions</td>
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## Session Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Details</th>
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<tbody>
<tr>
<td>CM</td>
<td>Communication and Organizational Management</td>
<td>Includes topics such as written/oral communication skills, leadership, self-management and organizational development</td>
</tr>
<tr>
<td>FM</td>
<td>Financial Management</td>
<td>Includes topics such as general accounting and financial analyses</td>
</tr>
<tr>
<td>HR</td>
<td>Human Resources Management</td>
<td>Includes topics such as employment law, employee recruitment, training and compensation</td>
</tr>
<tr>
<td>LI</td>
<td>Legal Industry/Business Management</td>
<td>Includes topics such as trends in the legal industry, liability, legal business ethics, business insurance, marketing and planning techniques</td>
</tr>
<tr>
<td>OM</td>
<td>Office Operations Management</td>
<td>Includes topics such as technology and facilities management</td>
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<tr>
<td>XS</td>
<td>Extended Session</td>
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</tr>
<tr>
<td>MS</td>
<td>Mini-Series</td>
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</table>
**EDUCATION AT-A-GLANCE**

**THURSDAY, OCTOBER 16, 2008**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>8:30 - 10 a.m.</td>
<td>Opening General Session &amp; Keynote Address</td>
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<tr>
<td></td>
<td>Comedy with a Byte: Observing Work Life with an Eye Toward Humor</td>
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<tr>
<td></td>
<td>CM01 Communication and Organizational Management</td>
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<tr>
<td>10:30 a.m. - Noon</td>
<td>Concurrent Sessions</td>
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<tr>
<td></td>
<td>Metrics, Models, and Assessment of Partner Compensation Plans</td>
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<td></td>
<td>FM01 Financial Management</td>
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<td></td>
<td>Financial Management 101: Setting Up the Financial Function</td>
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<td>FM02 Financial Management</td>
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<td></td>
<td>Insurance Auditing: Optimizing Your Strategic Risk Management Processes</td>
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<td></td>
<td>L101 Legal Industry/Business Management</td>
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<tr>
<td>1:30 - 2:30 p.m.</td>
<td>Concurrent Sessions</td>
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<tr>
<td></td>
<td>Tax Update: New Developments Impacting Law Firms and Attorneys</td>
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<tr>
<td></td>
<td>FM03 Financial Management</td>
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<td></td>
<td>HRAs &amp; HSAs: Integrating Your Options</td>
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<td></td>
<td>HR01 Human Resources Management</td>
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<tr>
<td>3 - 4:15 p.m.</td>
<td>Concurrent Sessions</td>
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<tr>
<td></td>
<td>Law Firm Budgeting Basics: The Critical Nuts and Bolts</td>
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<td></td>
<td>FM05 Financial Management</td>
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<tr>
<td></td>
<td>Understanding the Pension Protection Act and Your Role in Your Firm’s</td>
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<td></td>
<td>Pension Planning</td>
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<td>FM06 Financial Planning</td>
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<td></td>
<td>Evaluating Financial Systems</td>
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<td></td>
<td>OM01 Office Operations - Information Technology</td>
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<tr>
<td>4:15 - 5:45 p.m.</td>
<td>Concurrent Sessions</td>
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<tr>
<td></td>
<td>Advanced Budgeting and Ratio Analysis</td>
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<td></td>
<td>FM07 Financial Management</td>
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<tr>
<td></td>
<td>Assessing Your Firm’s Vulnerability to Fraud and Embezzlement</td>
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<td></td>
<td>FM08 Financial Management</td>
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<td></td>
<td>Technology Trends and Update 2008</td>
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<td>OM02 Office Operations Management</td>
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**FRIDAY, OCTOBER 17, 2008**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>8:30 - 10 a.m.</td>
<td>General Session</td>
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<tr>
<td></td>
<td>What Drive’s a Firm’s Bottom Line?</td>
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<td></td>
<td>FM09 Financial Management</td>
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<tr>
<td>10:45 a.m. - Noon</td>
<td>Concurrent Sessions</td>
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<tr>
<td></td>
<td>Profitability I: Increasing Profits Through the Use of Client and Attorney</td>
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<td></td>
<td>Profitability Analysis</td>
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<td>FM10 Financial Management</td>
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<td>A/R Management: Managing Client Expectations from Intake to Collections</td>
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<td>FM11 Financial Management</td>
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<td>Retaining Your Associate Talent</td>
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<td>HR02 Human Resources Management</td>
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<tr>
<td>1:30 - 2:45 p.m.</td>
<td>Concurrent Sessions</td>
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<tr>
<td></td>
<td>Profitability II: Increasing Profitability Using IT Solutions with the Highest Return on Investment</td>
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<td>OM03 Office Operations Management - Information Technology</td>
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<td>Building Business Value in Vendor Relationships</td>
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<td></td>
<td>L102 Legal Industry/Business Management</td>
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<td></td>
<td>Advanced Tips and Techniques I: Leveraging Outlook® for Increased Productivity</td>
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<td>OM04 Office Operations Management - Information Technology</td>
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<tr>
<td>3:30 - 5 p.m.</td>
<td>Concurrent Sessions</td>
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<td></td>
<td>Evaluating Merger Opportunities: Should 1 + 1 = 2?</td>
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<td>L103 Legal Industry/Business Management</td>
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<td>Business Intelligence Through the Use of Dashboards to Manage Firm</td>
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<td>Performance</td>
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<td>OM05 Office Operations Management - Information Technology</td>
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<td></td>
<td>Advanced Tips and Techniques II: Excel(lent) Techniques for Using Spreadsheet Applications</td>
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<td>OM06 Office Operations Management - Information Technology</td>
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**SATURDAY, OCTOBER 18, 2008**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>7:30 - 8:30 a.m.</td>
<td>Continental Breakfast &amp; Roundtable Discussions</td>
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<tr>
<td>8:30 - 9:30 a.m.</td>
<td>Concurrent Sessions</td>
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<tr>
<td></td>
<td>Modern Trends in Banking and Methods for Maximizing Your Banking</td>
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<td>Relationships</td>
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<td></td>
<td>FM12 Financial Management</td>
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<tr>
<td></td>
<td>Aligning Your Firm’s Needs with Your Real Estate</td>
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<tr>
<td></td>
<td>OM07 Office Operations Management</td>
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<tr>
<td>8:30 - 10:40 a.m.</td>
<td>How to Measure Anything: You Can’t Play the Game if You Don’t Know the Score</td>
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<td></td>
<td>FM13 Financial Management</td>
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<tr>
<td>9:40 - 10:40 a.m.</td>
<td>Concurrent Sessions</td>
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<tr>
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<td>Formalized Approaches to Succession Planning in Law Firms</td>
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<td></td>
<td>LI04 Legal Industry/Business Management</td>
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<td>Sustainability: Greening Trends that Drive Costs</td>
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<td></td>
<td>OM08 Office Operations Management</td>
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<tr>
<td>10:50 - Noon</td>
<td>Closing Session</td>
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<td>Leading from the Middle: Breathing Life into Lessons You’ve Just Learned</td>
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<tr>
<td></td>
<td>CM02 Communication and Organizational Management</td>
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</tbody>
</table>
### Opening General Session

8:30 – 10 a.m.

**Welcome and Keynote Address:**

**Comedy with a Byte: Observing Work Life with an Eye Toward Humor**

Greg Schwem, Comedy with a Byte, Inc.  
www.comedywithabyte.com

By the end of the session participants should be able to:

- Contemplate whether or not "efficient" technological tools are making even the most proficient of us inefficient
- Discover how to take work just a little less seriously

### Concurrent Sessions

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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</table>
| 10:30 a.m. - Noon | **Metrics, Models, and Assessment of Partner Compensation Plans**
|        | Carl A. Leonard, JD, Hildebrandt International                         |
|        | **FM01 Financial Management**                                           |
|        | Hildebrandt professionals remind us that "few issues have more impact on a firm's culture, strategy, or potential for success than how income is allocated among the owners." Determining and evaluating these compensation plans, however, is a difficult challenge for legal professionals. With multiple models and metrics available for implementing and monitoring compensation and a volatile economic landscape, compensation planning has recently become even more challenging for financial executives. In this session, participants are asked to examine the full economic impact of their firms' approach to compensation. |
|        | By the end of the session participants should be able to:               |
|        | • Distinguish between different compensation models and metrics        |
|        | • Apply appropriate tools for evaluating their current compensation plans |
|        | • Maximize firm revenue and partner profits without adverse impact on client satisfaction |
|        | **Audience:** Attendees should have a working knowledge of compensation planning. |
|        | **CPE Credit:** 90 Minutes **Field of Study:** Finance **Audience:** I |

<table>
<thead>
<tr>
<th>Time</th>
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</table>
| 10:30 a.m. - Noon | **Financial Management 101: Setting Up the Financial Function**
|        | Steve Odum, Bricker & Eckler, LLP                                      |
|        | Gary Pace, CLM, Sacks Tierney, PA                                      |
|        | Brian Robbins, CLM, Hunt Ortmann Paify Nieves Lubka Darling & Mah, Inc. |
|        | **FM02 Financial Management**                                           |
|        | In this session, a panel of law firm financial management experts review significant drivers of law firm finance and profitability. Key processes and concepts including financial statements and their relationship to one another, critical financial metrics, the budgeting process, capitalization, internal controls, and year-end planning are examined and intended as a primer or refresher. |
|        | By the end of the session participants should be able to:               |
|        | • Identify the key financial indicators for law firms and how to benchmark against them |
|        | • Determine which monthly reports must be produced and to whom they should be distributed |
|        | • Create meaningful budgets                                           |
|        | • Distinguish the differences between profits and partner compensation |
|        | • Determine minimal requirements or baseline requirement for effective internal controls |
|        | • Discuss methods for analyzing capital adequacy                      |
|        | • Describe the basic requirements of year-end planning                 |
|        | **Audience:** Attendees at any level will benefit from this session. No advance preparation is necessary. |
|        | **CPE Credit:** 90 Minutes **Field of Study:** Finance **Audience:** B |
10:30 a.m. - Noon • Concurrent Sessions

Insurance Auditing: Optimizing Your Strategic Risk Management Processes
Daniel D. Klauss, Aon Risk Services Lawyers’ Division
LI01 Legal Industry/Business Management

Does your firm or organization have the right kind of insurance coverage? All law firms and organizations have insurance, but not all have a systematic process for determining whether or not to retain or transfer exposures to loss, shore up coverage in specific arenas, or strategically expose the organization to risk. In this session, participants are encouraged to examine their level of exposure from a bird’s eye view and focus on those areas that (1) may indicate unacceptable levels of risk, or (2) be over-insured.

By the end of this session participants should be able to:

- Identify areas of possible exposure
- Devise strategies for obtaining optimal coverage
- Create an implementation strategy for monitoring risks and measuring risk management outcomes

Audience: Attendees should have a working knowledge of risk management.

CPE Credit: 90 Minutes
Field of Study: Management Advisory Services

Noon - 1:30 p.m. • Lunch and ALA Insights

Susan French Koran
ALA President-Elect

Learn about the Association’s upcoming goals and objectives as ALA President-Elect Susan French Koran provides an overview of ALA’s current and future plans.

1:30 – 2:30 p.m. • Concurrent Sessions

Tax Update: New Developments Impacting Law Firms and Attorneys
Ron Seigneur, MBA, CPA/ABV, CPA/CFF, CVA, Seigneur Gustafson LLP
FM03 Financial Management

In the world of tax and tax law, each year most often represents change, so what constituted compliance last year may be outdated or noncompliant this year. Seigneur examines the most critical developments in tax law and regulations, outlining both the requirements for compliance and the impact on your reporting practices.

By the end of the session participants should be able to:

- Discuss how taxes impact law firms and law firm owners based on their form of practice
- Identify recent tax law developments affecting both law firms and attorneys
- Appraise current practices for potential compliance issues based on new tax regulations
- Assess what the future appears to hold for possible tax law changes affecting business and individual taxpayers

Audience: Attendees should have a working knowledge of tax law.

CPE Credit: 60 Minutes
Field of Study: Taxes

HRAs & HSAs: Integrating Your Options
Liza Fulton, CFC, CSA, FlexMagic Consulting, Inc.
HR01 Human Resources Management

With soaring health care and increasing regulatory compliance requirements, exploring health benefit options is not only a prudent strategy – it’s becoming a requisite strategy for curtailing costs. What are the options and regulatory concerns associated with various health insurance and benefit choices? Perhaps more importantly, what is the potential impact of these choices on the firm’s bottom line?

By the end of this session participants should be able to:

- Identify tax-advantaged health options and basic compliance concerns
- Determine how to properly integrate Health Reimbursement Arrangements (HRAs) and Health Savings Accounts (HSAs) with existing benefits
- Compare insurance choices and the potential financial impact to the firm’s bottom line

Audience: Attendees should have a working knowledge of employee benefits and financial analysis

CPE Credit: 60 Minutes
Field of Study: Specialized Knowledge and Applications

Library Cost: Analyzing and Managing This Cost Center Effectively
Sarah Clark Kavanagh, Esq, Library Associates Companies
FM04 Financial Management

The law library is sometimes referred to as the “brain trust” of the firm. However, law library costs can be significant budget factors. What are the best practices for managing the library as a cost center in today’s law firm? In this session, participants will explore the operating cost and benefits of the law library and methods for controlling expenses.

By the end of this session participants should be able to:

- Analyze information resource costs
- Determine and prioritize user needs
- Use a new approach to formulate information contracts

Audience: Attendees should have a working knowledge of the legal industry and financial analysis.

CPE Credit: 60 Minutes
Field of Study: Finance

2:30 - 3 p.m. • Beverage Break
### Law Firm Budgeting Basics: The Critical Nuts and Bolts

**Richard Nigon, CLM, CPA, Robins Kaplan Miller & Ciresi, LLP**

**FM05 Financial Management**

While budgeting is a requisite of financial planning in any organization, law firms are home to unique budgeting considerations. In this session, attendees are asked to explore the pivotal elements of law firm budgeting. What makes budgeting in a law firm unique and how can it be accomplished effectively?

**By the end of the session participants should be able to:**
- Outline and describe the key elements of law firm budgeting
- Identify stakeholders and use the budget to build and create consensus
- Identify available resources
- Use budgeting tools and concepts for financial reporting and management decisions

**Audience:** Attendees at any level will benefit from this session. No advance preparation is necessary.

**CPE Credit:** 75 Minutes  
**Field of Study:** Finance  
**Audience:** B

### Understanding the Pension Protection Act and Your Role in Your Firm’s Pension Planning

**Mark Bono, ABA Retirement Funds Program, ING**

**FM06 Financial Management**

With the collapse of Enron, Anderson, and others, guidelines outlining the fiduciary responsibilities of employers have been examined by both businesses and government, leading to the Pension Protection Act of 2006. Designed to ensure greater retirement security for American workers, the Act has also fundamentally changed the process of pension planning for American organizations and the responsibilities of financial executives. In this session, participants discuss case updates and their impact on fiduciary liability management.

**By the end of this session attendees should be able to:**
- Define the primary principles and responsibilities outlined in the Pension Protection Act
- Identify key changes and their impact on workplace performance
- Iner the ramifications for effectively managing fiduciary liability

**Audience:** Attendees at any level will benefit from this session. No advance preparation is necessary.

**CPE Credit:** 75 Minutes  
**Field of Study:** Business Law  
**Audience:** B

### Evaluating Financial Systems

**L. Don Holland, CPA, HSV Consulting Group LLC**

**OM01 Office Operations – Information Technology**

As technologies continue to proliferate and demands for efficiency escalate, selecting and implementing appropriate financial systems becomes more and more critical. Knowing how to successfully align technological capabilities and features with actual business needs is key to accessing crucial data in meaningful ways and increasing your firm’s operational efficiency.

**By the end of this session participants should be able to:**
- Align technological capabilities to business needs
- Compare technologies across “apples to apples” dimensions
- Calculate the return on investment
- Plan and manage the implementation process

**Audience:** Attendees at any level will benefit from this session. No advance preparation is necessary.

**CPE Credit:** 75 Minutes  
**Field of Study:** Computer Science  
**Audience:** B

### Advanced Budgeting and Ratio Analysis

**Richard Nigon, CLM, CPA, Robins Kaplan Miller & Ciresi, LLP**

**FM07 Financial Management**

According to a recent survey, budgets are most effective when they are directly tied to business goals, yet fewer than 41% of the organizations surveyed indicated their budgets were tightly aligned. How can financial managers avoid this widespread problem and implement better budgeting and analytical processes? In this session, Nigon covers a range of advanced budgeting techniques and analytical tools for the experienced financial manager. Topics include the budget scope, differential budgeting techniques, forecasting, and analytical tools.

**By the end of the session participants should be able to:**
- Align budgeting techniques to organizational goals
- Apply advanced analytical tools to the budgeting process
- Prepare and utilize capital and cash flow budgets

**Audience:** Attendees should have advanced knowledge of the legal industry and budgeting.

**CPE Credit:** 75 Minutes  
**Field of Study:** Finance  
**Audience:** A

### Assessing Your Firm’s Vulnerability to Fraud and Embezzlement

**Mary Ellen Kraus, McDonald Tinker Skaer Quinn & Harrington, PA**

**FM08 Financial Management**

Even with optimal internal controls and rigid system firewalls, law firms, just like any other organization, can unwittingly expose themselves to unacceptable levels of risk for both fraud and embezzlement. To protect your firm it is critical to enact a program of rigorous assessment and periodic updates. In this session, Kraus not only outlines the methods law firms should implement to minimize risk, but provides narrative detail about the consequences for failing to do so.

**By the end of this session participants should be able to:**
- Evaluate their firms’ level of risk and exposure to fraud and embezzlement
- Analyze methods and solutions for mitigating risk
- Identify types of white collar crimes
- Recognize warning signs of fraud

**Audience:** Attendees at any level will benefit from this session. No advance preparation is necessary.

**CPE Credit:** 75 Minutes  
**Field of Study:** Management Advisory Services  
**Audience:** B
Technology Trends and Update 2008
L. Don Holland, CPA, HSV Consulting Group LLC
OM02 Office Operations Management

What are the ramifications of today’s rapid technology changes on your law firm administration? It is imperative that financial management professionals understand the impact of new technology on their law firm, what tools are available, and the ways technology can streamline firm operations. During this session, Holland introduces emerging technology trends and the implications for the legal industry, including emergent patterns in workflow, business process management, imaging systems, e-discovery tools, litigation support, desktop applications, e-mail management, system consolidation, operating systems, collaborative communication, technology staffing, and management.

By the end of the session, participants should be able to:
- Describe key technology trends
- Discuss the implications of technological change on firm administration, financial management, and organizational culture
- Identify potential issues for law firms

Audience: Attendees at any level will benefit from this session. No advance preparation is necessary.

CPE Credit: 75 Minutes Field of Study: Computer Science

Audience: B

Friday, October 17, 2008

7 a.m. – 5 p.m. • Registration

7:30 – 8:30 a.m. • Continental Breakfast

What Drives a Firm’s Bottom Line?
Ron Seigneur, MBA, CPA/ABV, CPA/CFF, CVA, Seigneur Gustafson LLP
FM09 Financial Management

Law firm financial managers are keenly aware of the significance of financial performance and profitability, particularly in the current context of economic volatility. But what exactly are the best predictors of successful outcomes and the best practices for optimizing profitability? This session challenges participants to critically examine their own assumptions about financial drivers and their approach to financial management. Seigneur explores the attributes of successful law practices from an economic context by defining what the “bottom line” really is and why it is considered by many to be the key data point from a financial reporting standpoint.

By the end of the session participants should be able to:
- Debate whether the profitability game is won or lost on the revenue side of the ledger
- Assess where to find additional profits and cash flow without incurring significant additional costs
- Recognize the importance of measuring and monitoring billing and collection realizations
- Evaluate the benefits and risks associated with profit center accounting
- Critically assess the dangers of short term strategies to improve bottom line performance

Audience: Attendees at any level will benefit from this session. No advance preparation is necessary.

CPE Credit: 90 Minutes Field of Study: Finance

Audience: B

10 a.m. - 3:30 p.m. • Exhibit Hall Open

10 - 10:45 a.m. • Break in Exhibit Hall

Profitability I: Increasing Profits through the Use of Client & Attorney Profitability Analysis
Lorri Salyards, CLM, Moya White LLP
Ron Seigneur, MBA, CPA/ABV, CPA/CFF, CVA, Seigneur Gustafson LLP
FM10 Financial Management

All organizations turn a keen eye toward the bottom line wondering how to improve margins and increase profitability. In this session, participants explore methods for becoming more profitable by focusing on project, practice area, and individual attorney profitability.

Participants may opt to attend one or both of the sessions associated with this Profitability Mini-Series. The second session, Profitability II: Increasing Profitability Using IT Solutions with the Highest Return on Investment, is on Friday, from 1:30 – 2:45 p.m. Attendance at both sessions is strictly optional.

By end of the session participants should be able to:
- Utilize profit center accounting concepts
- Leverage practice area and attorney profitability creatively to improve the firm’s overall bottom line
- Implement best practices for optimizing profitability

Audience: Attendees should have a working knowledge of the legal industry and financial analysis.

CPE Credit: 75 Minutes Field of Study: Finance

Audience: I MS

www.alanet.org/finance
### A/R Management: Managing Client Expectations from Intake to Collections

Seelin Naidoo, CEO, Cash Management Solutions

**FM11 Financial Management**

Accounts receivable is often the largest tangible asset on the firm’s balance sheet. Yet some firms and organizations devote little time and effort to truly managing accounts receivable and intervening in the life cycle process. Applying accounts receivable management principles, however, can increase cash flow, reduce bad debt losses, and produce higher margins for the firm.

By the end of the sessions participants should be able to:
- Define best practices for managing throughout the life cycle of accounts receivable
- Implement management processes to produce higher margins and decrease bad debt losses for the firm
- Determine ways to harness technology to drive revenue management performance

Audience: Attendees should have a working knowledge of financial management.

CPE Credit: 75 Minutes  
Field of Study: Finance  
Audience: I

### Retaining Your Associate Talent

James Wilber, Esq., Altman Weil, Inc.

**HR02 Human Resources Management**

A recent Altman Weil survey found that attraction, promotion, and retention of talent is one of the highest priorities among law firm leaders. And with good reason. Firms are losing talent to both their clients and to other law firms at elevated rates. Wilber addresses what a firm can do to remain in the race for talented lawyers, discover the staggering costs associated with failing to stem the exodus, and examine the attrition rates with a critical eye toward the underlying causes.

By the end of the session participants should be able to:
- Examine probable causes for escalating attrition rates in the legal industry
- Discuss best practices for optimizing retention of associate level talent
- Determine the actual cost of associate attrition for firm leaders

Audience: Attendees should have a working knowledge of human resources management and retention strategies.

CPE Credit: 75 Minutes  
Field of Study: Personnel/HR  
Audience: I

### Profitability II: Increasing Profitability Using IT Solutions with the Highest Return on Investment

Deborah Novachick, Strategic Automation Consulting

**OM03 Office Operations Management – Information Technology**

Increasing the firm’s profitability is explored in this session through an alternative lens – that of implementing IT solutions that offer the best return on investment. Novachick, an experienced technology and management consultant, brings her expertise to the table demonstrating proven methods for selecting, implementing, and managing the IT function to increase the firm’s margins.

Participants may opt to attend one or both of the sessions associated with this Profitability Mini-Series. The first session, Profitability I: Increasing Profits Through the Use of Client & Attorney Profitability Analysis, is on Friday, at 10:45 a.m. – Noon. Attendance at both sessions is strictly optional.

By the end of the session participants should be able to:
- Evaluate the business case for different IT solutions for improving the bottom line
- Discuss the challenges faced when implementing some of the most promising solutions
- Identify proven change-management methods for overcoming obstacles and demonstrating results

Audience: Attendees should have a working knowledge of financial analysis and law firm technology

CPE Credit: 75 Minutes  
Field of Study: Computer Science  
Audience: I

### Building Business Value in Vendor Relationships

Rebekah Krupski, Express Scripts

**L102 Legal Industry/Business Management**

The practice of vendor management is more than a legal industry catch phrase – it is a practice than can assist the savvy financial manager in actualizing increased profits. In this session, participants explore the tenets of effective vendor management and develop the tools necessary for creating and sustaining effective vendor relationships.

By the end of the session participants should be able to:
- Describe the roles used in vendor relationship governance
- Develop the skill set and communication strategies associated with effective vendor relationship governance
- Engage the requisite documentation processes
- Appraise the efficiency of a vendor governance organizational model for their law firms

Audience: Attendees at any level will benefit from this session. No advance preparation is necessary.

CPE Credit: 75 Minutes  
Field of Study: Finance  
Audience: B
### Advanced Tips and Techniques I: Leveraging Outlook® for Increased Productivity

**Ivan L. Hemmans III, O’Melveny & Myers, LLP**

**OM04 Office Operations Management – Information Technology**

While Microsoft Outlook is a recognized tool for organizing e-mail, the full functional capacity of Outlook is often overlooked. In this session, participants can explore how to leverage the full power of Outlook and increase their personal levels of productivity. Further attention is devoted to transporting critical information to remote and mobile technology, supporting networking needs, and serving as a base project management tool.

Participants may opt to attend one or both of the sessions associated with this Advanced Tips & Techniques Mini-Series. The second session, Advanced Tips and Techniques II: Excel(lent) Techniques for Using Spreadsheet Applications, is on Friday, from 3:30 - 5 p.m. Attendance at both sessions is strictly optional.

By the end of the session participants should be able to:
- Utilize and integrate the full range of features Outlook offers including journal, tasks, calendar, and e-mail
- Employ categories to coordinate Outlook data
- Configure and customize Outlook to meet business needs more effectively
- Integrate Outlook with remote and/or mobile technology

**Audience:** Attendees should have a strong working knowledge of calendar applications and e-mail applications.

**CPE Credit:** 75 Minutes  **Field of Study:** Computer Science  **Audience:** A

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### Evaluating Merger Opportunities: Should 1 + 1 = 2?

**Alan R. Olson, JD, MBA, Altman Weil, Inc.**

**LI03 Legal Industry/Business Management**

While mergers themselves are expensive, failed mergers are even more costly. Law firm mergers have the potential to elevate firms to higher levels of performance and marketplace recognition - but not without first committing considerable internal and external resources to the process. So when is it advantageous to merge, and what are the baseline requirements for a successful merger? In this session participants explore the financial and strategic processes necessary for enacting a successful merger and gain critical insights on why some mergers succeed and others fail.

By the end of this session participants should be able to:
- Outline the critical factors that should be considered when contemplating a merger
- Identify the analytic tools for evaluating the strategic and financial value of a proposed merger
- Outline the critical factors that should be considered when contemplating a merger
- Identify the analytic tools for evaluating potential strategic and financial values of a proposed merger

**Audience:** Attendees should have a working knowledge of mergers and acquisitions.

**CPE Credit:** 90 Minutes  **Field of Study:** Finance  **Audience:** I

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### Business Intelligence Through the Use of Dashboards to Manage Firm Performance

**Debra B. Marple, Mercer Belanger Attorneys at Law**

**Kevin Pollei, Parsons Behle & Latimer**

**Lorri Salyards, CLM, Moye White, LLP**

**OM05 Office Operations Management – Information Technology**

Aligning business intelligence technology with financial planning, budgeting, and reporting metrics is a major process for even the most technologically savvy law firm. This panel explores how “best practices” have enabled their law firms to combine business intelligence data with applications that produce visually clear and achievable results.

By the end of this session participants should be able to:
- Integrate business intelligence data with financial reporting metrics
- Discuss the capacity of dashboards to create critical and actionable information for financial decision making
- Discover ways to create work-arounds if dashboards are not in the budget
- Evaluate business intelligence dashboards for their own work settings

**Audience:** Attendees should have a working knowledge of financial reporting requirements and technology.

**CPE Credit:** 90 Minutes  **Field of Study:** Computer Science  **Audience:** I

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### Advanced Tips and Techniques II: Excel(lent) Techniques for Using Spreadsheet Applications

**Ivan L. Hemmans III, O’Melveny & Myers, LLP**

**OM06 Office Operations Management – Information Technology**

For principal administrators who are already proficient with Excel®, this session takes Excel spreadsheet solutions to the next level of productivity. Attendees are guided through intermediate and advanced techniques for using Excel to increase the types of financial data they can produce in the legal setting.

Participants may opt to attend one or both of the sessions associated with this Advanced Tips and Techniques Mini-Series. The first session, Advanced Tips and Techniques I: Leveraging Outlook for Increased Productivity, is on Friday from 1:30 - 2:45 p.m. Attendance at both sessions is strictly optional.

By the end of this session participants should be able to:
- Use the “look up” feature to find values in lists
- Distribute delimited data across cells
- Report and summarize huge amounts of data with Pivot Tables
- Set up reliable data validation

**Audience:** Attendees should have a strong working knowledge of spreadsheet software applications.

**CPE Credit:** 90 Minutes  **Field of Study:** Computer Science  **Audience:** A
### Modern Trends in Banking and Methods for Maximizing Your Banking Relationships

**Stacia Freimuth,** Colorado Business Bank

*FM12 Financial Management*

Maximizing your relationship with banking partners can greatly improve your ability to manage your firm or organization. Listen in on an industry professional to discover what emergent banking trends could impact your firm adversely or influence your firm’s decision making processes.

### Aligning Your Firm’s Needs With Your Real Estate

**Chanie Wood,** Pallavicini LLC

*OM07 Office Operations Management*

The skilled financial manager, armed with understanding the firm’s business needs, current lease terms, and the local commercial real estate market, can leverage real estate to best support the organization. In this session, Wood addresses how the firm’s changing needs translate into desirable lease terms and when it is smart to make a move.

### How to Measure Anything: You Can’t Play the Game if You don’t Know the Score

**John Iezzi,** CPA, Iezzi Management Group

*FM13 Financial Management*

One of the key elements of planning – from financial management to marketing – is to incorporate some level of performance measurement. It serves no purpose to prepare and execute a plan if there is no method for evaluating whether the plan is meeting its goals and objectives. There are other times where you need to make a current decision for dates that extend into the future. How do you determine current versus future value? How can you make valid forecasts? Using a range of performance and financial measurements, Iezzi reviews how to measure anything to ensure interim, mid-term, and final goals and business objectives are met.

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The roundtable discussions provide an opportunity for attendees to discuss real workplace issues. Each roundtable focuses on a specific topic and is facilitated by legal administrators who have expertise on the topic.

### Roundtables

- **Cost Recovery/FM:** Facilitator: Kevin Pollei, Parsons Behle & Latimer
- **Motivational Techniques for Multiple Generations:** Facilitator: Lorri Salyards, CLM, Moye White LLP
- **CLM:** Facilitator: Gary Pace, CLM, Sacks Tierney PA.
- **Anti-Trust Issues:** Facilitator: Debi Marple, Mercer Belanger
- **E-Billing:** Facilitator: Steven Odum, Bricker & Eckler LLP

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### Concurrent Sessions

#### By the end of this session participants should be able to:

- Identify key banking trends that can impact your firm or organization
- Discriminate between transactional and relationship banking
- Determine which banking services your firm or organization needs
- Examine implications of credit terms and conditions
- Leverage favorable trends and your firm’s banking relationships

**Audience:** Attendees should have a working knowledge of financial management and the banking industry.

**CPE Credit:** 60 Minutes  
**Field of Study:** Finance  
**Audience:** I

#### By the end of the session participants should be able to:

- Outline the critical components of a lease
- Discuss strategies for aligning lease terms with the firm’s needs
- Assess the deciding factors in the determination when or whether to move

**Audience:** Attendees should have a working knowledge of leasing and lease negotiations.

**CPE Credit:** 60 Minutes  
**Field of Study:** Finance  
**Audience:** I

#### By the end of the session participants should be able to:

- Distinguish between a range of measurements and align them with appropriate uses
- Determine corrective measures to take when plans need to get back on target
- Calculate outcomes and engage in forecasting using a variety of financial measurements
- Assess the types of information the measurements provide and what they mean for decision making

**Audience:** Attendees should have a working knowledge of financial analysis.

**CPE Credit:** 120 Minutes  
**Field of Study:** Finance  
**Audience:** I
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<td>9:40 – 10:40 a.m.  •  Concurrent Sessions</td>
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| **Formalized Approaches to Succession Planning in Law Firms**  
Alan R. Olson, JD, MBA, Altman Weil, Inc.  
*LI04 Legal Industry/Business Management*  
Succession planning has traditionally been a management issue that receives little attention until a senior-level employee or partner announces plans to leave or retire. With more baby boomers reaching retirement age, however, firms of all sizes are beginning to heed the urgency of establishing a broad-based, formalized approach to succession planning. In this session participants explore the long-range and critical planning areas which need to be addressed in any effective succession plan.  
By the end of the session participants should be able to:  
- Identify critical elements of a succession plan  
- Formulate a prescribed view of succession planning  
- Create a strategy for mitigating impacts on profitability and cash flow  
**Audience:** Attendees should have a working knowledge of succession planning.  
**CPE Credit:** 60 Minutes  
**Field of Study:** Business Management and Organization  
**Audience:** I |
| **Sustainability: Greening Trends that Drive Costs**  
Gina Maciula, CLM, SPHR, Wendel Rosen Black & Dean  
*OM08 Office Operations Management*  
As ecological resources continue to diminish, law firms have begun to take seriously the need to implement strategies for using renewable resources in ways that are socially responsive and responsible. While sustainable practice is a high-level social and moral business imperative, “greening the law firm” is not without financial cost. But failing to do so may be even costlier. In this session attendees examine short-term and long-term costs associated with building and maintaining an ecologically sustainable practice.  
By the end of this session participants should be able to:  
- Recognize the key components of sustainability in the law firm or legal department.  
- Identify the tools required and costs associated with creating a sustainable legal environment.  
- Analyze the short and long-term costs of greening the law firm  
- Calculate the return on investment associated with creating a sustainable practice  
**Audience:** Attendees should have a working knowledge of space assessment, design, and development strategies in addition to return on investment analysis.  
**CPE Credit:** 60 Minutes  
**Field of Study:** Administrative Practice  
**Audience:** I |
| 10:40 – 10:50  •  Beverage Break |
| 10:50 a.m.  - Noon  •  Closing General Session |
| **Leading from the Middle: Breathing Life into Lessons You’ve Just Learned**  
Karen MacKay, Phoenix Legal Inc.  
*CM02 Communication and Organizational Management*  
Law firms, like other organizations, rely on financial strength as a basis for achieving non-financial business goals. In fact, research indicates when financial professionals are deeply involved in the strategic direction of an organization, everyone wins. So how can financial professionals increase their visibility and responsibility in their firm and become an integral part of the every day functions of the firm, working in partnership with leadership, marketing, information technology, and all other essential business elements? MacKay addresses these issues through an examination of leadership from the middle as participants explore how to implement the strategies and processes learned over the last two days.  
By the end of the session participants should be able to:  
- Express key concepts and processes derived from the last two days of this conference to stakeholders and staff  
- Create processes to obtain partner buy-in for new financial processes or goals  
- Implement critical learning from this year’s conference  
**Audience:** Attendees at any level will benefit from this session. No advance preparation is necessary.  
**CPE Credit:** 60 Minutes  
**Field of Study:** Personal Development  
**Audience:** B |
Registration Form  ALA’s 2008 Law Firm Financial Management Conference & Exposition

Please photocopy this form for your records and for additional registrants.
ALA Regular and Associate members may register for this conference at the member rates. Nonmember registration is restricted to individuals who are not currently members of ALA but who do meet the eligibility requirements for ALA membership. For more information on membership eligibility requirements, visit www.alanet.org/join or contact the ALA Membership Department.

October 16-18, 2008
Renaissance Schaumburg Hotel & Convention Center
Schaumburg, Illinois

If you have any questions while completing registration materials or on ALA’s administrative policies or complaint resolution, please call (847) 267-1252.

(1) Registration Information

Name: ________________________  Member ID Number: ________________________
Title: ________________________
Firm/Company: ________________________
Type of employer:
□ Private Law Office  □ Corporate Legal Dept.  □ Government Legal Dept./Judicial Agency/Court  □ Other ________________________
Address: ________________________
City: ________________________ State/Province: ________________________
Zip/Postal Code: ________________________
Phone: ________________________  Fax: ________________________
E-mail: ________________________  Nickname for Badge: ________________________

(2) Select Registration Option

Registration Fees

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*One-day registrations entitle you to sessions and functions for that day only.

Guest Tickets

The following events are included in your individual registration – do not order unless you are bringing a guest. Purchase of tickets to these events is restricted to guests of ALA’s Law Firm Financial Management Conference registrants only.

Guest Full Name: ________________________
Nickname for Guest Badge: ________________________

Event                      Qty    (USD & CAD)    TOTAL
Thursday Continental Breakfast  25   $25   $25
Thursday Lunch                50    $50   $50
Friday Continental Breakfast  25   $25   $25
Friday Lunch in the Exhibit Hall 50    $50   $50
Saturday Continental Breakfast 25   $25   $25

(3) Method of Payment

☐ Check Enclosed (payable to Association of Legal Administrators)
☐ Visa  ☐ MasterCard  ☐ American Express

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(4) R.S.V.P. Required

Receptions and meals are included in your full registration. Tickets are required for all meals. Please indicate which sessions and meal events you will attend.

THURSDAY, OCTOBER 16
7:30 – 8:30 a.m.  Continental Breakfast
8:30 – 10 a.m.  Welcome and Keynote: Comedy with a Byte
10:30 a.m. – Noon
□ Metrics, Models, and Assessment
□ Financial Management 101
□ Insurance Auditing
Noon – 1:30 p.m.
□ Lunch & ALA Insights
1:30 – 2:30 p.m.
□ Fax Update: New Developments
□ HRAs & HSAs: Integrating Your Options
□ Library Cost: Analyzing and Managing This Cost Center
3 – 4:15 p.m.
□ Law Firm Budgeting Basics
□ Understanding the Pension Protection Act
□ Evaluating Financial Systems
4:30 – 5:45 p.m.
□ Advanced Budgeting & Ratio Analysis
□ Assessing Your Firm’s Vulnerability
□ Technology Trends and Update 2008

FRIDAY, OCTOBER 17
7:30 – 8:30 a.m.  Continental Breakfast
8:30 – 10 a.m.  What Drives a Firm’s Bottom Line?
10:45 a.m. – Noon
□ Profitability I: Increasing Profits
□ A/R Management: Managing Client Expectations
□ Retaining Your Associate Talent
Noon – 1:30 p.m.
□ Lunch in Exhibit Hall
1:30 – 2:45 p.m.
□ Profitability II: Using IT Solutions
□ Building Business Value in Vendor Relationships
□ Advanced Tips & Techniques I: Leveraging Outlook*
3:30 – 5 p.m.
□ Evaluating Merger Opportunities
□ Business Intelligence Through the Use of Dashboards
□ Advanced Tips & Techniques II: Excel(lent) Techniques

REGISTER TODAY!
1) Online: www.alanet.org/finance (credit card payments only)
2) Fax: (847) 267-1329 (credit card payments only)
3) Mail: Return this form with payment to: ALA Registration, P.O. Box 95583 Chicago, IL 60694-5583

Canadian members return this form with Canadian payment to: ALA Registration, P.O. Box 57157 Station A Toronto, ON M5W 5M5

SATURDAY, OCTOBER 18
7:30 – 8:30 a.m.  Continental Breakfast & Roundtable Discussions
8:30 – 9:30 a.m.
□ Modern Trends in Banking
□ Aligning Your Firm’s Needs With Your Real Estate
8:30 – 10:40 a.m.
□ How to Measure Anything (extended session)
9:40 – 10:40 a.m.
□ Formalized Approaches to Succession Planning in Law Firms
□ Sustainability: Greening Trends that Drive Costs
10:50 a.m. – Noon
□ Closing General Session

Please check all appropriate boxes:
□ This is my first Law Firm Financial Management Conference.
□ Please have an ALA staff member contact me to discuss accommodations for my dietary restrictions and/or disabilities.
□ I am requesting attorney MCLE credit for the state of ____________

VENDORS

Vendors, including consultants and suppliers to the legal industry, who are NOT exhibiting, will not be able to register as conference attendees or as guests of an attendee.

CANCELLATION POLICY

Refunds will not be issued for no-shows. ALA requires written notice of your cancellation, which must be faxed to (847) 267-1329 or mailed to ALA Headquarters (75 Tri-State International, Suite 222, Lincolnshire, IL 60069-4435).

If your cancellation notice is received:
• On or before Oct. 1, 2008, you will receive a 75% refund.
• On or after Oct. 2, 2008, you WILL NOT receive a refund.

SUBSTITUTIONS

A substitute from the registrant’s organization is permitted for a $60 administrative fee. The registration fee will be adjusted if a nonmember replaces the registrant.

REFUND OF GUEST TICKETS

A full refund (less $15 handling fee) will be issued on or before Oct. 1, 2008. No refunds will be issued after Oct. 1, 2008.
**Speaker Bios**

**Mark Bono** is a Senior Business Development Officer and Registered Principal with ING. He has been in the investment business for more than 18 years and has focused on retirement plans for the past 14. While at State Street Research, he was a retirement plan consultant and was instrumental in the establishment of its turnkey 401(k) product.

**Stacia Freimuth** is a Senior Vice President and the Manager of the Private Banking group at Colorado Business Bank, a $2.2B financial services company headquartered in Denver, CO. She began her career as a commercial underwriter for Chase Bank and subsequently moved into a lending function. Currently, she manages a department portfolio approaching $200MM consisting of a variety of industries. Freimuth received her BS in Finance and International Business from Miami University (of Ohio).

**Liza Fulton** CFC, CSA, is CEO and President of FlexMagic Consulting, Inc. She is a nationally recognized expert in Flexible Benefit Plans and other employee benefit programs tailored for the various stages of life. The author of *Your Guide to Child Care Savings*, Fulton is a frequent speaker and educator on tax-free benefits. She has been quoted in *The Wall Street Journal*, *Working Mother* Magazine and *CFO* Magazine, and has been a guest on the Today Show.

**Ivan L. Hemmans III** is a senior information technology trainer at O’Melveny & Myers LLP, in Los Angeles, CA, and has extensive experience in information technology. Hemmans has worked at O’Melveny & Myers since 1998 and as a User Support Specialist and Support Analyst for various phases of the vendor life-cycle. Using her combined experiences in programming and cognitive science from UCLA, Hemmans offers a unique blend of experience and good-natured humor.

**L. Donald Holland**, CPA is partner-in-charge of the HSV Consulting Group, LLC., where he has consulted with law firms for more than 20 years in multiple areas, including financial, time and billing system selection and implementation, and accounting and billing department operations. His clients include over 1,000 law firms, ranging in size from two to over 800 lawyers and timekeepers. Holland is an author and a frequent ALA speaker on legal economics.

**John G. Iezzi**, CPA, has a wide breadth of experience in all areas of law firm management and administration. He spent 16 years as the Administrator of McGuire, Woods, Battle & Boothe, a 300 lawyer firm headquartered in Richmond, VA. Iezzi is an Adjunct Professor at the TC Williams School of Law at the University of Richmond where he teaches a course in Law Office Management and is author of the book, *Results-Oriented Financial Management*, published by the American Bar Association.

**Sarah Clark Kavanagh**, Esq., is Vice President of Strategic Consulting for the Library Associates Companies. Her first job was in a library 28 years ago and she has worked in, utilized and supported libraries and information resources ever since then. After leaving the practice of law, Kavanagh worked in the global legal industry for over a decade focusing on optimizing value and cost recovery of library expenses, and facilitating benchmarking studies to provide insight on industry trends, cost-saving alternatives and best practices.

**Daniel D. Klauss** is a Certified Insurance Counsellor and Vice President for Aon Risk Services Lawyers Division, where he serves as a practice leader for Aon's Mid-Sized Law Firm Initiative. He advises and represents law firms on risk management and in the placement of their professional liability insurance. Klauss served as an instructor for the Insurance Institute of Canada for four years, and has spoken on the topic of policy coverage issues at ALA’s annual conferences and at the ABA Standing Committee on Lawyers Professional Liability.

**Susan French Koran** is the Director of Administration at Fellers Snider Blankenship Bailey & Tipps, PC, with offices in Oklahoma City and Tulsa, Oklahoma. A legal administrator for 11 years, Koran has been a member of ALA since 1998 where she has held numerous regional and chapter positions. She has been a speaker at the Chapter Leadership Institute and numerous other ALA chapter retreats and luncheons, and is currently ALA’s President-elect.

**Mary Ellen Kraus** is the Legal Administrator for McDonald, Tinker, Skar, Quinn & Herrington, P.A. She manages the business functions of the firm, including financial management, business planning and analysis, human resources and systems management. Her experience with Fraud in the Law Office is a result of being hired to clean-up in the aftermath of embezzlement. She is Past President of ALA’s Wichita Area Chapter, has held several board positions and has served on Region 3’s Regional Nominating Committee.

**Becky Krupski** recently joined Express Scripts in St. Louis, Missouri as Director of Vendor and Asset Management. Previously, she spent nine years with A.G. Edwards & Sons where she and her staff were responsible for various phases of the vendor life-cycle. Using her combined experiences in contract negotiations, procurement, relationship management, and technology, Krupski sought to identify industry best practices in the field of vendor management and align those practices to satisfy the requirements of A.G. Edwards.

**Carl Leonard** joined Hildebrandt International following a 26-year career with Morrison & Foerster. After practicing law at Morrison for 15 years as a general corporate partner, he was the firm’s Chairman from 1984 through 1993. Leonard was named one of the 100 most influential lawyers in America by The National Law Journal. He is the Chairman and Director of The Hildebrandt Institute, the educational arm of Hildebrandt International dedicated to leadership and skills development for managing partners and practice leaders and an Adjunct Professor in The George Washington University Master’s in Law Firm Management Program.

**Regina (Gina) Maciula**, CLM, SPHR, is Executive Director of Wendel, Rosen, Black & Dean, LLP, a 62-attorney law firm in Oakland, California, the first law firm to be certified as a Green Business by a third party agency. She is a member of the California State Bar Task Force on Sustainable Law Practice, has served as chair of ALA’s Certification Committee and is immediate past California State Director for SHRM. Maciula has provided consulting services and training in communication skills and management, office administration, human resources management, and communication.
Karen MacKay is a principal with Phoenix Legal Inc, a firm that advises law firms with regard to competitive talent strategies including assessment, development, coaching and outplacement. She is Myers-Briggs qualified, a Certified Human Resources Professional and holds an MBA from the Rotman School of Management at the University of Toronto. MacKay has authored many articles that have been published in the US, the UK, Canada, Australia and Europe. She is a frequent ALA presenter.

Debra Marple, CPA, is the Legal Administrator at Mercer Belanger in Indianapolis. She began her career in law firm finance and accounting more than 20 years ago in Washington, D.C., working with a number of national law firms. She has been a speaker and panelist at numerous ALA conferences on topics including budgeting, financial reporting, mergers & acquisitions, disaster recovery and document retention. Marple is currently a master’s candidate at George Washington University.

Seelin Naidoo, is Chief Executive Officer at Cash Management Solutions (CMS) where he is responsible for strategic direction and overall operations. Prior to joining CMS, Seelin was Senior Vice President at Trustinus, a global outsourcing company, and Vice President and General Manager of Kelly Services’ outsourcing division. He has sold and launched outsourcing operations in Europe, Mexico, and India, and has negotiated and developed key alliances on and off shore.

Richard J. Nigon, CLM, CPA, is the CFO of the Minneapolis-based law firm of Robins, Kaplan, Miller & Ciresi L.L.P. He has worked in the field of law firm finance for more than 20 years and has participated in several effective strategic planning initiatives during his career as a legal manager. Nigon, a frequent presenter at ALA conferences and chapter meetings, is a past ALA President.

Deborah Novachick is President of Strategic Automation Consulting, an international practice based in San Francisco, California. She has been an advisor to the legal industry for over 25 years, specializing in operations management, automation, workflow, and strategic management decision-making. She has been on the faculty of ALA’s program, Essential Competencies for Legal Administrators, for over seven years, and is a frequent speaker on ALA conferences and chapter meetings.

Kevin R. Pollei is the Chief Operating Officer for Parsons Behle & Latimer in Salt Lake City. He has 20 years of experience in the accounting industry with both small and large firms. Prior to joining the legal industry he worked for a Fortune 50 company as the Director of its largest division. He has been working in the legal industry for the past 10 years, and has been a Chief Financial Officer for the past seven. Pollei has been an ALA member since 2002 and has served as President of the Utah chapter.

Brian A. Robbins, CLM, CPA, is the Executive Director of Hunt Ortmann Palfy Nieves Lubka Darling & Mah, Inc., a construction litigation firm in Pasadena, CA. He is a recent President and active member of the Greater Los Angeles Chapter of ALA. Robbins has been a member of ALA since 1992. He has worked in public accounting and held finance and administrative positions in various firms over the last 15 years.

Lorri Salyards, CLM is the Executive Director of Moye White LLP in Denver, Colorado. She has been in law firm administration since 1986 and an active member in ALA, having served in various capacities at the local, regional and national levels. Salyards has published articles in ALA News, ALA’s Management Encyclopedia and The California Lawyer and is a frequent speaker at industry events including the University of Denver’s program, Master of Science in Legal Administration, and ALA’s Essential Competencies for Legal Administrators law firm management program.

Ronald L. Seigneur, MBA, CPA/ABV, CPA/CFF, CVA, is a Partner of Seigneur Gustafson LLP in Lakewood, CO where he specializes in management consulting, business valuations, litigation support services, and taxation. Seigneur has worked with hundreds of closely held businesses and professional service firms and has more than 25 years of management and consulting experience, including six years as the Chief Financial Officer and Chief Operating Officer for a 50-attorney law firm in Denver, Colorado.

James Wilber, Esq., is a principal of Altman Weil, Inc. He leads consulting projects in organization, practice management, lawyer professional development, paralegal issues and programs, compensation, and law firm executive searches. Wilber heads Altman Weil’s services to corporate and government law departments, and has written and lectured extensively on management issues in the legal profession. He has been published or quoted in numerous publications, including the ABA Journal, The American Lawyer, National Law Journal, Corporate Counsel, and many state bar association journals.

Chanie Wood is Founder and Partner of Pallavicini LLC where she brings more than 12 years of experience in strategic planning, contract negotiation, and transaction and project management of all aspects of corporate relocation. As a licensed real estate broker, Wood combines her experience as a tenant representative and project manager to make the negotiation strategy and decisions made at each phase of a project more informed. Her global perspective provides her with understanding how the terms of the deal impact the design, construction and business operations for the client.
LOCATION OF CONFERENCE
The Renaissance Schaumburg Hotel & Convention Center is located in Schaumburg, Illinois, and is approximately 12 miles from O'Hare International Airport, 32 miles from Chicago Midway Airport, and 30 miles from downtown Chicago.

REGISTRATION
ALA Regular and Associate members may register for this conference at the member rates noted on the Registration Form. Nonmember registration is restricted to individuals who are not currently members of ALA but who do meet the eligibility requirements for ALA membership. For more information on membership eligibility requirements, visit www.alanet.org/join or contact the ALA Membership Department at (847) 267-1252.

Your registration fee includes admission to all educational sessions, all breaks, continental breakfasts, lunches on Thursday and Friday, and the Exhibit Hall on Friday.

One-day only registration includes admittance to the educational sessions and meal functions for that day only. Friday-only registration also includes admittance to the Exhibit Hall.

There is not an option to register only for the Exhibit Hall. You must register for all day Friday in order to have access to the Exhibit Hall.

REGISTRATION LOCATION AND HOURS
The ALA Registration Desk will be located on the second level of the Convention Center and will be open on Thursday, October 16, from 7 a.m. – 5:45 p.m.; Friday, October 17, from 7 a.m. – 5 p.m.; and on Saturday, October 18, from 7:30 a.m. – Noon.

EXHIBIT HALL
Be sure to visit the Exhibit Hall where each vendor is ready to share strategic solutions designed to help you run your law firm or legal department more effectively. The Exhibit Hall is where connections are made, new suppliers are found and important new trends are discovered. Take advantage of this unique opportunity to see and touch the industry’s latest products and services in one place.

Exhibit Hall hours are from 10 a.m. – 3:30 p.m. on Friday, October 17. Please stop by and thank our exhibitors and sponsors — your partners in business.

Friday, October 17, 2008
Morning Break • 10 – 10:45 a.m.
Lunch in Exhibit Hall • Noon – 1:30 p.m.
Afternoon Break • 2:45 – 3:30 p.m.

EDUCATIONAL SESSIONS
While we ask that you indicate your session preferences on the registration form, this is for planning purposes only. You are welcome to attend any class you wish during the conference as long as there are still seats available. Seating in the classes is on a first-come, first-seated basis.

AS A COURTESY
As a courtesy, please advise the vendor or ALA at your earliest opportunity if you need to change a reservation for a Vendor-Hosted Event or are unable to attend an ALA-hosted event for which you indicated you would be attending.

ONLINE REGISTRATION
To register online for the conference, log on to www.alanet.org/finance where you will find detailed information, including session descriptions, interesting attractions, and how to register for the conference. ALA’s Web site, located at www.alanet.org, is filled with valuable information on upcoming educational events, including ALA’s 2009 Annual Educational Conference and Exposition in New Orleans, Louisiana.

GUEST REGISTRATION
Ticket purchases are restricted to guests of attendees only. A guest is a spouse or significant other, friend, relative or child (18 years or older to attend Exhibit Hall events) who is not an ALA member, is not eligible to become an ALA member, or in an industry-related occupation. A co-worker or an associate within the industry is not eligible for guest tickets.

Guest badges and tickets admit guests to ticketed functions. Guests may enter the Exhibit Hall with a badge, however, guest badges do not admit individuals to educational sessions.

SUBSTITUTIONS
A substitute from the registrant’s organization is permitted for a $60 administrative fee. The registration fee will be adjusted if a nonmember replaces an ALA member.

EMERGENCIES
We recommend that attendees leave their office staff and family members with a conference schedule and hotel telephone number in the event of emergency.

DRESS CODE
The conference attire is business casual. You may wish to bring a sweater or light jacket as it is difficult to regulate temperatures in meeting rooms. Comfortable shoes are recommended.
SAVE UP TO 10% ON UNITED AIRLINES!
Save up to 10% off airfares on United Airlines when you book your travel through David Lloyd & Associates, ALA’s official travel agency. They will research the most economical route, airline, and flight times to help you get the lowest possible airfare. These discounts are only available when you use David Lloyd & Associates. Please call (800) 233-9303 or (312) 494-6046, weekdays 7 a.m. - 7 p.m. You may also e-mail them at david@davidlloydtravel.com. A $22 agent fee will be added per ticket.

David Lloyd & Associates also offers an online reservation service at www.alatravel.com that allows travelers to make reservations 24 hours a day, seven days a week for only $12 per ticket. First-time users need to click REGISTER to begin (if you are returning to the site, please fill in your user name and password and click LOG IN). Once logged in, click the Meeting Center link located in the upper left-hand corner of the Web page. From there, choose Finance Conference, Chicago, IL, and follow the remaining prompts to fill out your profile and book travel. When stranded at the airport due to severe weather, mechanical delays, or when needing an immediate change due to scheduling issues, David Lloyd & Associates is an indispensable ally.

EARN 500 BONUS MILES ON DELTA!
Log on to www.delta.com, enter your Delta SkyMiles Frequent Flyer number and the SkyBonus number of US140994548 to be recognized as an ALA meeting attendee. Or call Delta at (800) 221-1212 and refer to SkyBonus number US140994548.

TRAVEL BETWEEN THE UNITED STATES AND CANADA
When traveling to the U.S. from Canada and other foreign countries, passports are required.

CLM
Make becoming a Certified Legal Manager (CLM)™ a priority in your professional journey. Did you realize that by attending this conference, you are already on your way?

First, consider some of the benefits of earning your legal manager certification:

- Enhance your value to your firm
- Validate your knowledge and expertise in the field of legal management
- Add credibility to your résumé and advance your career
- Provide a sense of empowerment, accomplishment and pride
- Gain greater professional respect in the workplace
- Obtain potential professional liability insurance discount for your firm

Second, explore www.alanet.org/clm where you will find the necessary information you will need to apply to take the exam, along with information on the subject areas covered. Sessions offered at this conference that will assist you in meeting the CLM education application requirements are clearly marked with the CLM logo. Subject areas are also indicated above each session title to assist functional specialists or those seeking recertification. For further clarification regarding eligibility or to obtain an application packet, please visit www.alanet.org/clm or call ALA Headquarters at (847) 267-1252.

Third, plan your schedule accordingly so that you, too, can become a Certified Legal Manager.

### CLM Exam Schedule

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<tr>
<th>Exam Date</th>
<th>Location</th>
<th>Application Deadline</th>
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<td>October 23, 2008</td>
<td>Austin, TX (in conjunction with the Regions 4&amp;6 Conference)</td>
<td>September 12, 2008</td>
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<td>October 23, 2008</td>
<td>Chicago, IL</td>
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<td>October 23, 2008</td>
<td>New York, NY</td>
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<tr>
<td>October 23, 2008</td>
<td>Orlando, FL</td>
<td>September 12, 2008</td>
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<tr>
<td>May 17, 2009</td>
<td>New Orleans, LA (in conjunction with the ALA Annual Conference)</td>
<td>March 30, 2009</td>
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SAVE $100
Register on or before September 19, 2008.

www.alanet.org/finance

October 16-18, 2008

EXHIBITORS

ABA Retirement Funds
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