

The Professional Liability Fund, Multnomah Bar Association, OSB Solo and Small Firm Section, and Oregon New Lawyers Division present:

# Technology Fair **PLUS** CLEs: Efficiency and Productivity Solutions for Your Law Practice

- Location:** OSB Center – Columbia Rooms A & B  
16037 SW Upper Boones Ferry Road, Tigard, Oregon 97224
- Date:** Wednesday, September 26, 2018
- Check In:** 8:00 a.m. – 8:30 a.m.
- Time:** 8:00 a.m. – 5:00 p.m.  
**Agenda on page 2, Vendor, Sponsor, and Drawing details, page 3**
- Fee:** \$15.00 (includes breakfast, lunch, and social hour)

This seminar has been approved for 5 MCLE credits – 4 Practical Skills/General and 1 Personal Management Assistance.

This day is dedicated to simplifying your life and answering your questions about technology. If you have wanted to learn more about legal software products that improve your productivity and have not had a convenient opportunity to “test drive” the products or ask your questions of the vendors you are interested in – then this day is for you! If you want an update on the latest products – come to this event! If you are interested in “knowing what’s out there” – but feel that starting the process is a bit daunting – this event will make it easy for you to get started!

*Efficiency and Productivity Solutions for Your Law Practice* offers a unique combination of “test driving” legal software products, legal software product demonstrations, and CLEs. The schedule builds in maximum flexibility – you will have time to explore the exhibit hall, see product demonstrations, and get CLE credit whether you are present all day or for part of the day.

You will have plenty of time to test out products and ask the questions you have not yet had time to get answered. There will be no high-pressure sales – just an opportunity to talk with many vendors all in the same place, get your questions answered, and obtain the information you are seeking. There will also be CLEs on improving your financial condition and on improving your health. The day will end with a social hour.

## Technology Fair **PLUS** CLEs: Efficiency and Productivity Solutions for Your Law Practice Seminar Registration

To register, please complete this form, and mail it to the PLF with a check for \$15 to: PLF, Attn: DeAnna Shields, PO Box 231600, Tigard, Oregon 97281-1600. Or you can register and pay online with a credit card at [www.osbplf.org](http://www.osbplf.org)>CLE>Upcoming. Click on the title of this program.

Registration deadline: Friday, September 21, 2018

Name: \_\_\_\_\_ OSB #: \_\_\_\_\_

Firm: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

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|---------------|---|
| 8:00          | <b>EXHIBIT HALL OPENS – COLUMBIA ROOM B AND COLUMBIA LOBBY</b>  |
| 8:00 - 8:30   | <b>REGISTRATION – MAIN LOBBY</b><br><b>CONTINENTAL BREAKFAST – SANDY ROOM</b>   |
| 9:00 - 10:00  | <b>CLE PRESENTATION – COLUMBIA ROOM A</b><br><b>Practice Management Software Made Simple</b><br>What is practice management software, how does it help, and what are the differences between the programs?<br>Rachel Edwards, PLF Practice Management Advisor      Larry Port, Rocket Matter<br>Erica Birstler, CosmoLex      Emily van Siereveld, Clio<br>Brian Gomez, PracticePanther |
| 10:00 - 10:30 | <b>TEST DRIVE LEGAL SOFTWARE PLUS – COLUMBIA ROOM B AND COLUMBIA LOBBY</b><br>Test drive legal software products and explore other law practice-related products and services.  |
| 10:30 - 11:00 | <b>CLE PRESENTATIONS – COLUMBIA ROOM A</b><br><b>Presentations on Legal Software</b><br>How to Keep Time Using Your Voice – Matthew Volm, Tali<br>Email Encryption – Meet Your Firm's Security Needs with the Click of a Button –<br>David Catalanotto, Trustifi  |
| 11:00 - 11:30 | <b>TEST DRIVE LEGAL SOFTWARE PLUS – COLUMBIA ROOM B AND COLUMBIA LOBBY</b><br>Test drive legal software products and explore other law practice-related products and services.  |
| 11:30 - 12:30 | <b>LUNCH AND CLE PRESENTATION – COLUMBIA ROOM A</b><br><b>Practice Management Software – How Easy It Is!</b><br>How to utilize the general features of Cosmolex, PracticePanther, Rocket Matter, and Clio<br>Erica Birstler, CosmoLex      Larry Port, Rocket Matter<br>Brian Gomez, PracticePanther      Emily van Siereveld, Clio   |
| 12:30 - 1:00  | <b>TEST DRIVE LEGAL SOFTWARE PLUS – COLUMBIA ROOM B AND COLUMBIA LOBBY</b><br>Test drive legal software products and explore other law practice-related products and services.  |
| 1:00 - 1:30   | <b>CLE PRESENTATION – COLUMBIA ROOM A</b><br><b>Presentations on Legal Software</b><br>Simplify Your Life by Automating Your Forms – R.W. Christensen, Jr., TheFormTool<br>Improving Your Writing Without Any Effort – Caroline Engle, Wordrake   |
| 1:30 - 2:00   | <b>TEST DRIVE LEGAL SOFTWARE PLUS – COLUMBIA ROOM B AND COLUMBIA LOBBY</b><br>Test drive legal software products and explore other law practice-related products and services.  |
| 2:00 - 3:00   | <b>CLE PRESENTATION – COLUMBIA ROOM A</b><br>Knowing Your Worth and Making Better Use of Your Time – A Report on Legal Trends<br>Emily van Siereveld, Clio  |
| 3:00 - 4:00   | <b>CLE PRESENTATION – COLUMBIA ROOM A</b><br>Staying Well and Thriving in the Legal Profession – Larry Port, Rocket Matter  |
| 4:00 - 5:00   | <b>SOCIAL HOUR AND REFRESHMENTS</b>   |

# Participating Vendors

**Advanced Legal** – Private cloud storage  
**Alicia Pollock** – QuickBooks consultant  
**Data Safe** – Document storage and destruction  
**DaVinci Digital** – IT services  
**Clio** – Practice management software  
**CosmoLex** – Practice management software  
**Fastcase** – Legal research software  
**Microsoft Office** - Productivity software  
**MyPleadings** - Document automation software

**TheFormTool** – Document automation software  
**PracticePanther** – Practice management software  
**Rocket Matter** – Practice management software  
**Ruby Receptionists** – Virtual receptionists  
**Tali**– Timekeeping software  
**Trustifi** – Email encryption software  
**Wordrake** – Editing software  
**Worldox** – Document management software  
**PLF Practice Management Advisors** – Free and confidential practice management assistance

## *Thanks to Our Sponsors!*

DaVinci Digital  
Fujitsu  
Multnomah Bar Association  
MyPleadings  
Oregon New Lawyers Division  
OSB Solo and Small Firm Section  
Ruby Receptionists  
Tali  
Wordrake  
Worldox

## Enter Our Drawings!

ScanSnap ix100A – a mobile and wireless scanner for personal or office use  
*Thank you, Fujitsu!*

Wordrake editing software licenses  
*Thank you, Wordrake!*

Entries for all drawings can be found at the registration table.

## About Our Speakers:

### OSB PROFESSIONAL LIABILITY FUND PRACTICE MANAGEMENT ADVISOR – RACHEL EDWARDS

Rachel Edwards received her BA from the University of Washington in Seattle and her JD from Willamette University College of Law. She is a member of the Oregon State Bar, Oregon Women Lawyers, Multnomah Bar Association, and a founding subcommittee member of the New Lawyers Division of the Washington County Bar Association. She has served as a Classroom Law Project Mock Trial Volunteer Judge, an Oregon Department of Human Services Adoption Contract Vendor Attorney, and a volunteer for the Convocation on Equality and the St. Andrew Legal Clinic.

Prior to joining the Professional Liability Fund in 2016, Rachel was in private practice for four years. Her areas of practice included Social Security disability, family law, adoption, and estate planning cases. In her role as a practice management advisor for the PLF, Rachel provides practice management assistance to Oregon attorneys to reduce their risk of malpractice claims and enhance their enjoyment of practicing law. Her assistance is free and confidential.

Rachel writes for the PLF's *inPractice* blog and tweets technology and practice management tips on Twitter.

### COSMOLEX – ERICA BIRSTLER

Erica Birstler is the Director of Strategic Communications at CosmoLex – developers of a fully integrated, cloud-based legal practice management, billing, and trust accounting system specifically designed for solos and small firms. Erica's degree is in Business Administration, and she has over six years' experience in the legal software industry, catering to the specialized technology needs of small to mid-sized law firms. Erica has given numerous presentations across the country on legal technologies such as law practice technology management, cloud computing, and legal billing and trust accounting compliance.

### CLIO – EMILY VAN SIEREVELD

Emily van Siereveld educates attorneys across the country about improving law firm productivity and efficiency using workflow management, Clio, and the cloud. She previously was a Clio client when she worked as the office manager for a busy immigration law firm, where she implemented multiple automation techniques and tools, enabling the firm to triple in size and expand to a second location. With an additional background in project and case management, Emily continuously works on improving efficiencies wherever she can.

### PRACTICEPANTHER – BRIAN GOMEZ

Brian Gomez is a consultant, presenter, educator, and account manager for PracticePanther. He provides consultations with attorneys and law office staff so that the firm can efficiently and effectively use case management software to improve its productivity.

## TALI – MATTHEW VOLM

Matt Volm is the CEO and Co-Founder of Tali, a voice-driven time tracking assistant powered by conversational technology like Amazon Alexa and Google Assistant. As a former CPA and husband to a practicing attorney, Matt has seen and experienced firsthand the challenges associated with tracking time, and is now on a mission to make time tracking a less painful task. He holds his MBA from the University of California - Berkeley Haas School of Business and is a Wisconsin native. He has lost his Wisconsin accent, but will never lose his love for the Green Bay Packers.

## THEFORMTOOL – R. W. CHRISTENSEN, JR

R.W. Christensen, Jr., is the CEO of TheFormTool, a document assembly software that increases efficiency and reduces errors in documents.

## WORDRAKE – CAROLINE ENGLE

Caroline Engle is a product representative for Wordrake. She works with the legal community demonstrating how Wordrake transforms rough drafts of legal documents and correspondence into concise and professional communications using Word and Outlook.

## ROCKET MATTER – LARRY PORT

Larry Port, founder and CEO of Rocket Matter, is a speaker and award-winning writer at the crossroads of the legal profession and cutting-edge technology. He frequently discusses marketing, design, efficiency, wellness in the legal profession, and quality techniques in the software industry that can be leveraged by lawyers and legal professionals. He was named to the 2012 Fastcase 50 honoring the law's smartest, most courageous innovators, techies, visionaries, and leaders.

## TRUSTIFI – DAVID CATALANOTTO

David Catalanotto is a Senior Account Executive at Trustifi with over 25 years of experience with technology. He is an expert in the field of cybersecurity and email encryption and enjoys working with law firms, U.S. federal bank regulators, and businesses of all sizes, helping their organizations meet their technology challenges and legal obligations to protect information.