

**Successful Small Firm
Practice Course**

District of Columbia Bar

October 2, 2021

Confidentiality

Rule 1.6(j) applies to my communications
with D.C. Bar Members

As the practice management advisor, I help lawyers
with business issues.

[Course Supplement Website](#)

**Why this Course is
necessary.**

What is it that we do?

**We are licensed to solve the problems
of others.**


In a unique context . . .

We are regulated

DC Rules of Professional Conduct

Where does ODC spend its time?

Chart V - Type of Practice



Type of Practice	2020	%	2019	%	2018	%	2017	%	2016	%
Firm	88	47%	92	39%	119	40%	130	44%	151	44%
Solo/Small Firm	85	45%	110	47%	139	47%	119	40%	155	45%
In House	7	4%	15	6.4%	8	3%	8	2.7%	7	2%
Government	4	2%	6	3%	11	4%	16	5%	17	5%
Other	2	1%	8	3.4%	10	3.4%	15	5.1%	11	3.2%
Public Interest	1	0.5%	5	2%	7	2.4%	9	3%	6	1.7%

Historically, 40% to nearly 50% of Disciplinary Counsel's investigations are of small firms.

We do this for money

The elusive profit

The 1958 Lawyer and his 1938 Dollar

**We were not always tied to the
billable hour**

The 100 best paying jobs in 2020

#38 Lawyer

Median salary: \$122,960

Stress level: High

DC is the wealthiest "state" by median income with the highest poverty rate as well

Special Consideration: The District of Columbia

- Median household Income: \$92,266 (2019)^[18]
- Population: 0.71 million (2020)^[19]
- Unemployment rate: 8.1% (2021)^[20]
- Poverty rate: 13.5% (2019)^[21]

The District of Columbia is not a state, of course, but the U.S. Census Bureau includes it among the 50 states when listing median income. Its inclusion makes sense, given the fact that the District's median income is higher than any state.^[18] As is likely unsurprising, the federal government is the largest employer in the nation's capital.^[22]

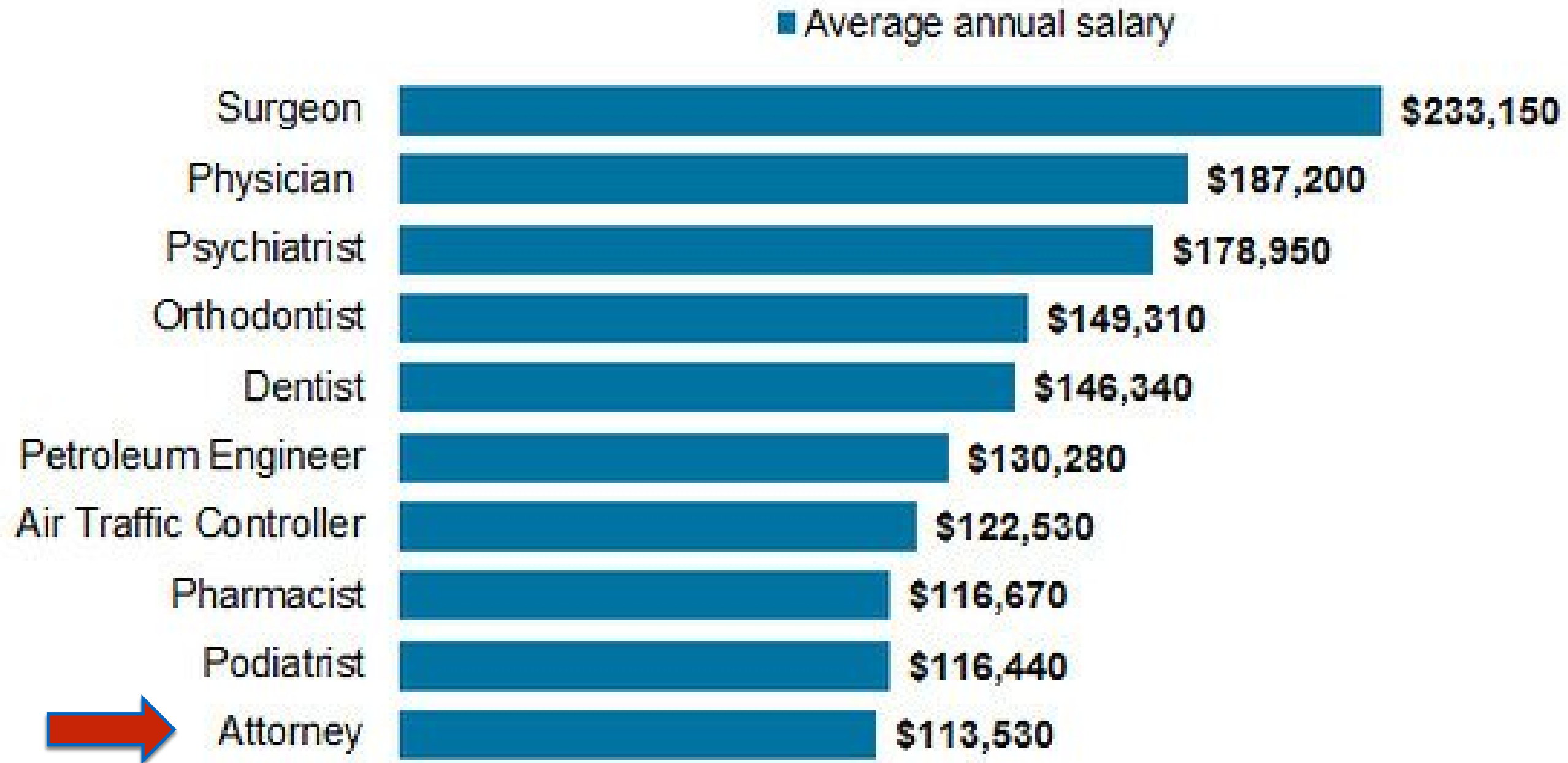
Additionally, Washington, D.C., is the only location that beats New Jersey in terms of both population density and median house value.^{[23][24]} Despite its high income and small population, D.C. also has the highest poverty rate of any of the richest states, with nearly a fourth of all children living below the poverty line.^[18]

^{[19][21][25]}

Seven years ago . . .

The 10 Best-Paying Jobs of 2014

Health-care jobs that require advanced degrees dominate the list.

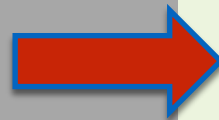


**And the public has an
attitude about us**

Please tell me how you would rate the honesty and ethical standards of people in these different fields -- very high, high, average, low or very low? How about -- [RANDOM ORDER]?

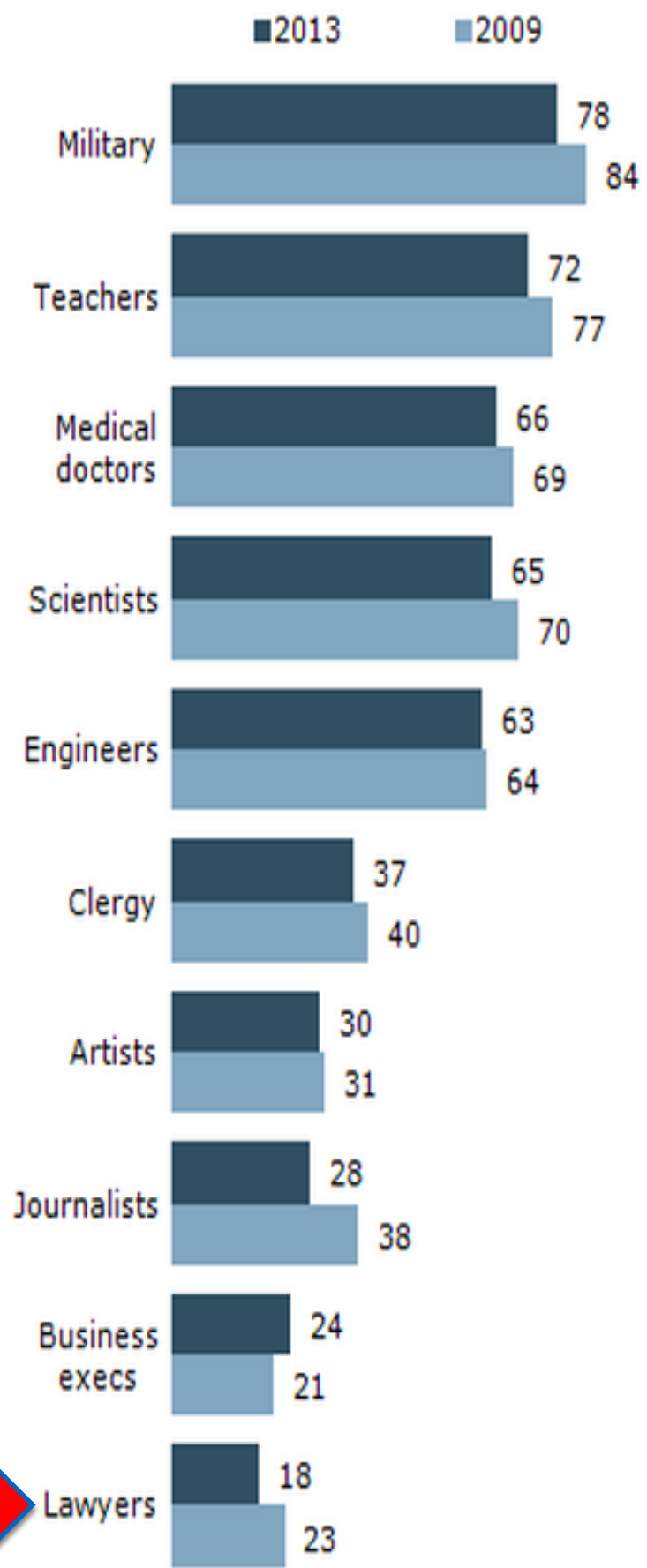
	Very high	High	Average	Low	Very low	No opinion
	%	%	%	%	%	%
Nurses	41	48	10	1	*	*
Medical doctors	27	50	19	2	1	*
Grade school teachers	26	49	17	5	2	*
Pharmacists	20	51	23	4	1	*
Police officers	16	36	30	11	7	*
Judges	9	34	40	12	4	1
Clergy	10	29	41	11	4	4
Nursing home operators	8	28	43	15	4	1
Bankers	5	24	48	16	5	*
Journalists	6	22	31	18	22	1
Lawyers	3	18	48	24	6	*
Business executives	2	15	46	26	10	1
Advertising practitioners	1	9	45	31	12	1
Car salespeople	1	7	53	29	8	*
Members of Congress	1	7	29	39	24	--

*Bottom quarter
on honesty*



Trend in Perceived Contribution

% saying each group contributes "a lot" to society's well-being



Where we rank higher

Lawyers are generally in the top ten percent for suicide and depression

Lawyers frequently struggle with alcohol abuse, depression & anxiety.

The goal of this Course

To create a law firm where you are:

solving problems you love to solve;

remaining always ethical; and,

making a profit without burnout.

Selecting the
problems to
solve

Where is your passion and competence?

How to choose the problems you will solve

What do I know how to do?

In what am I most expert?

Where is my best market?

Who is the lawyer within?

Play to your strengths

<https://www.gallupstrengthscenter.com/>

<http://www.viacharacter.org/www/>

<https://www.authentic happiness.sas.upenn.edu/>

The internal
determines
the external

Focusing narrowly on what you love

Makes it easier to establish expertise

Makes it easier to know your ideal client

Makes it easier to know your value to your ideal
client

**The path to a successful
firm starts with:**

A concept map

and

a business plan

The concept map

A visual thinking tool to -

Analyze

Organize

Understand

Remember

**It's power is in
its simplicity**

It works like your brain works.

Use it for -

Note taking
Brainstorming
Problem solving
Studying
Memorization
Planning
Researching
Presenting
Figuring things out

**Start in the
middle of a
blank page**

**Develop subtopics all
around the central
topic**

Examples using

Mindmeister

Simple Mind

Law Firm Business Plan

Executive Summary

Write it last

Firm Description

- Mission Statement - 30 words or less
- Goals & Objectives
- Philosophy
- Your Ideal Client
- Specific problem solving
- Your value
- Entity

Marketing Plan

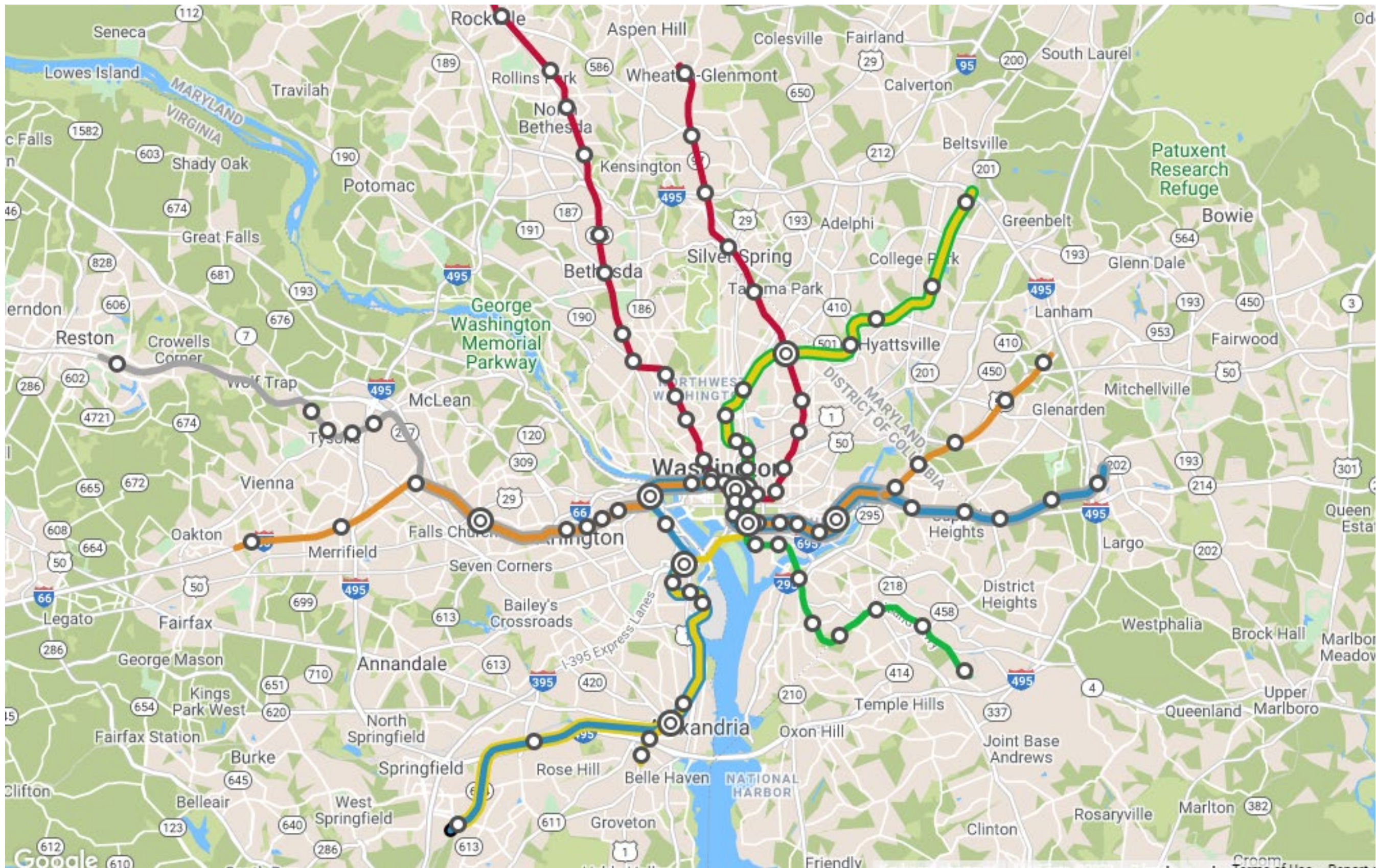
- Market research
- Target market
- Ideal client's problem recognition process
- Marketing initiatives
- Marketing tools

Services offered

- Competition issues
- Fee structure

Operational Plan

- How & where
- Office issues
- Staff issues
- Equipment
- Legal issues
- Vendors
- Money management
- Office management
- Startup expenses



What if you had to explain the Metro system?

Concept mapping resources

[The Mindmap Blog](#)

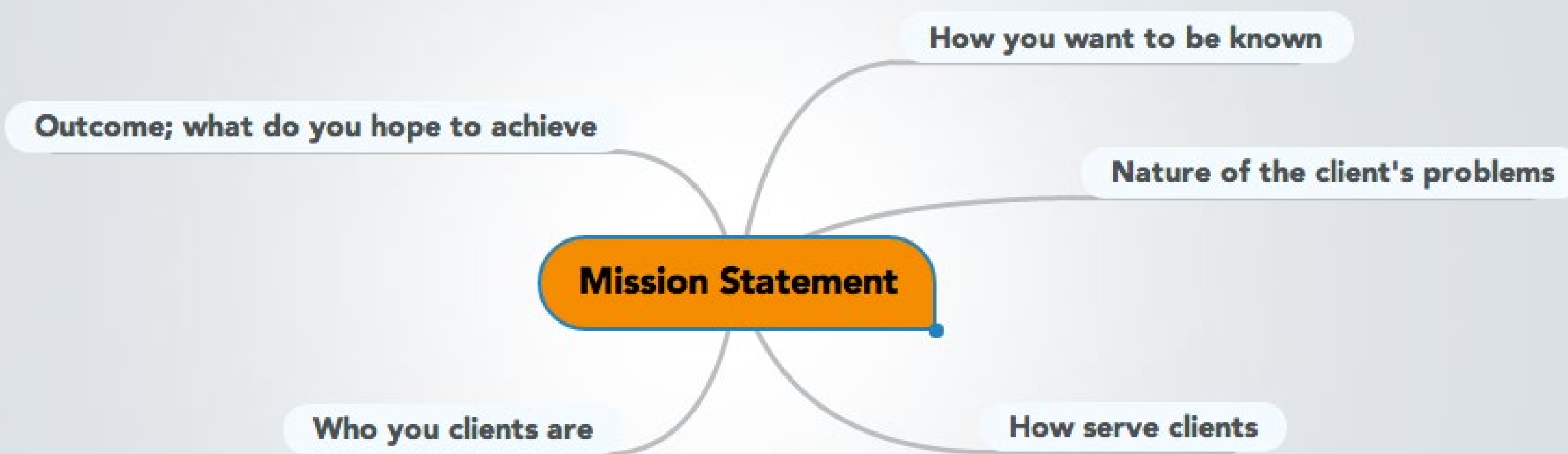
[YouTube Example](#)

[The theory underlying concept mapping](#)

The law firm business plan & workbook

**A good place to start is with the Mission
Statement**

**A short statement - 30 words or less -
explaining your reason for being**



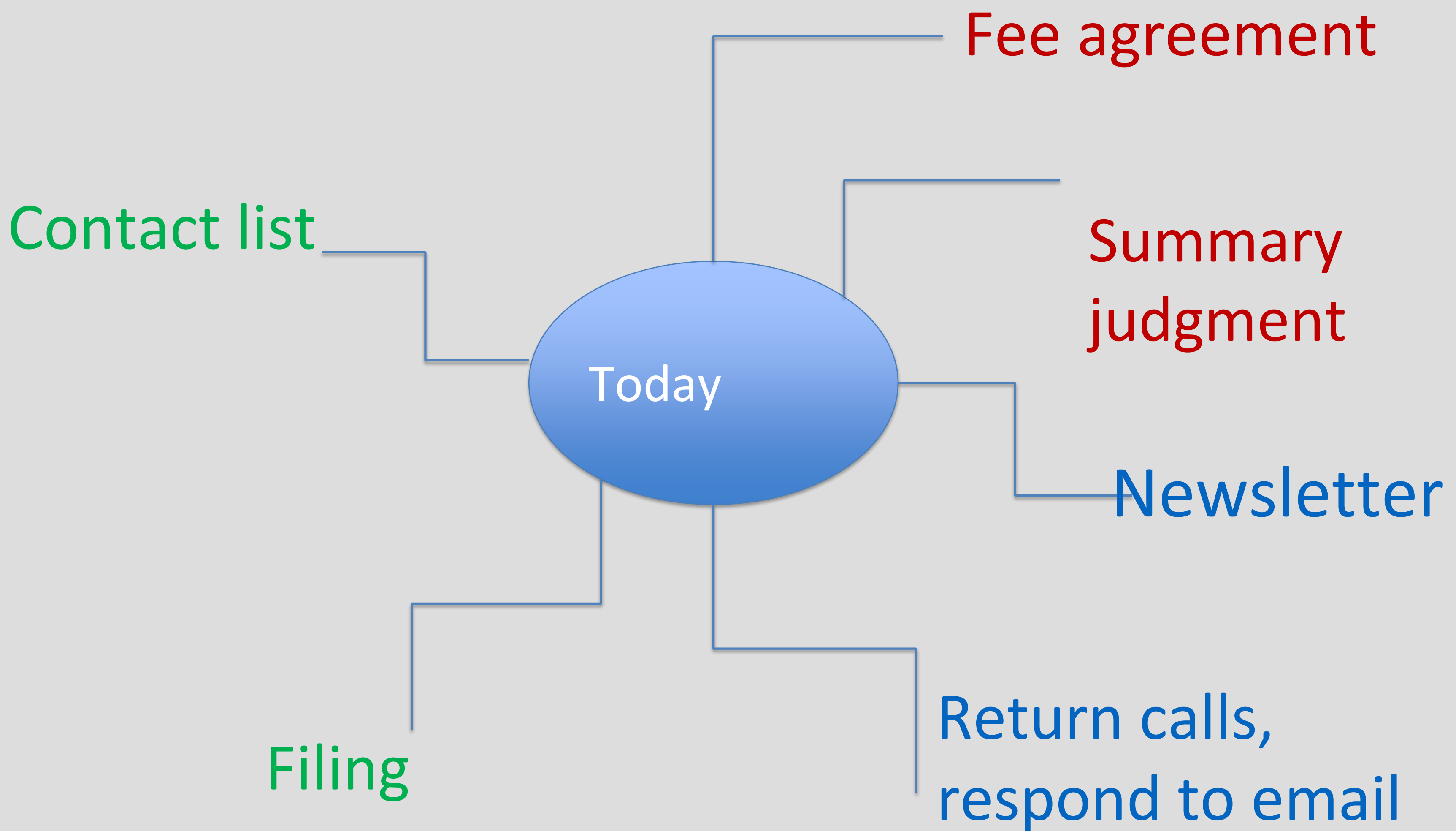
Preparing the Mission Statement

Google "law firm mission statement" for examples

Make yours unique and relevant.

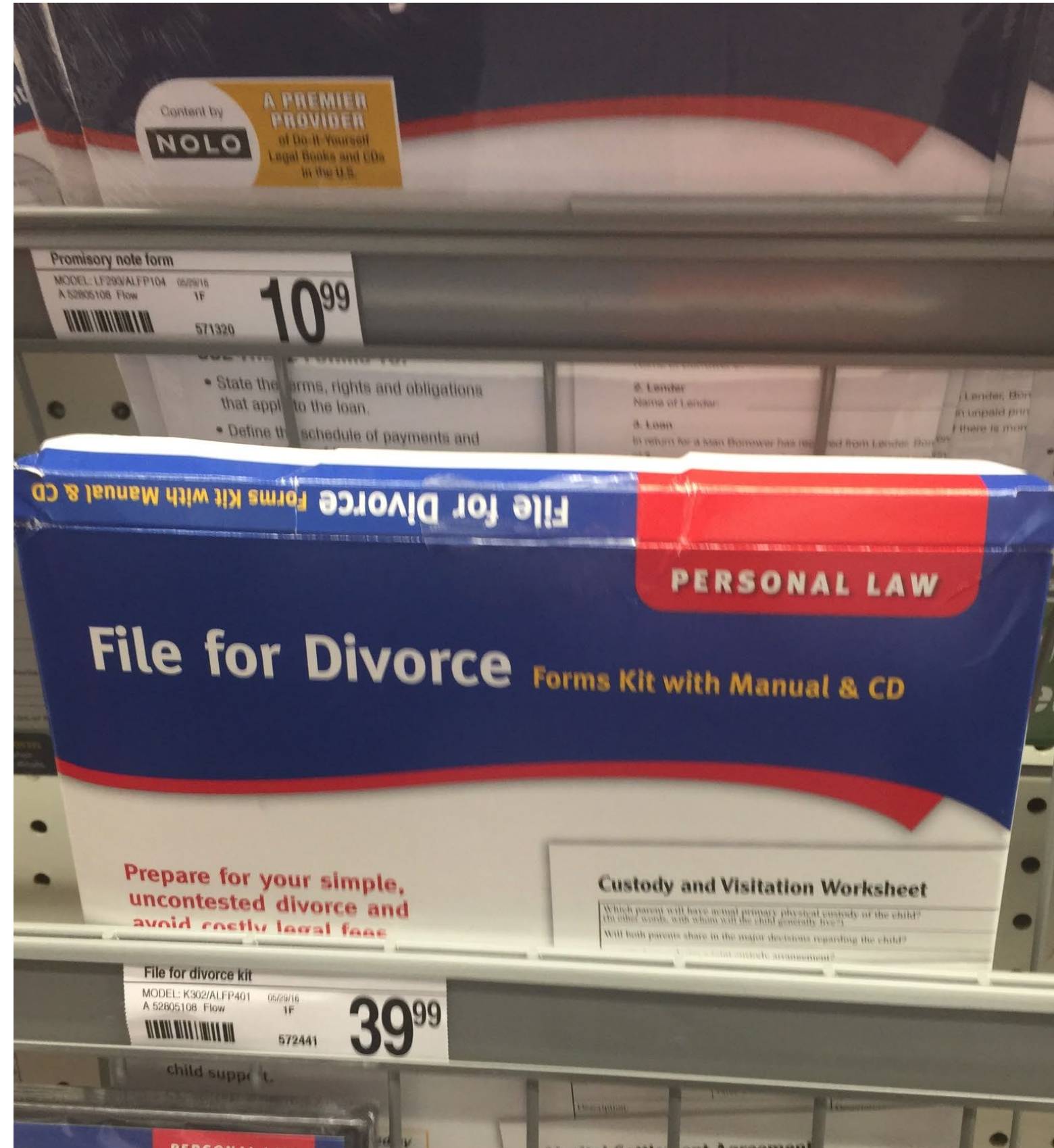
Mapping for time management

Start your day with a concept map



**Are you an entrepreneur
who happens to be a
lawyer,
or
a lawyer who has
shutdown entrepreneurial
instincts**

How do you respond to the prospective client who shows up with this?



How will you respond when hello divorce arrives?

Membership Options

serving California & Colorado

No court battles, lawyers or hidden fees *Better Value!*

Installment One Payment



Get a 7 day trial of the DIY and DIY Pro plans with coupon code 7DAYSFREE

MOST POPULAR



DIY DIVORCE

\$99 / month

No one time payment



DIY PRO

\$199 / month

No one time payment

DIVORCE PLUS

\$2,500

Flat fee, payable at once

DIVORCE WITH BENEFITS

\$3,000

Flat fee, payable at once

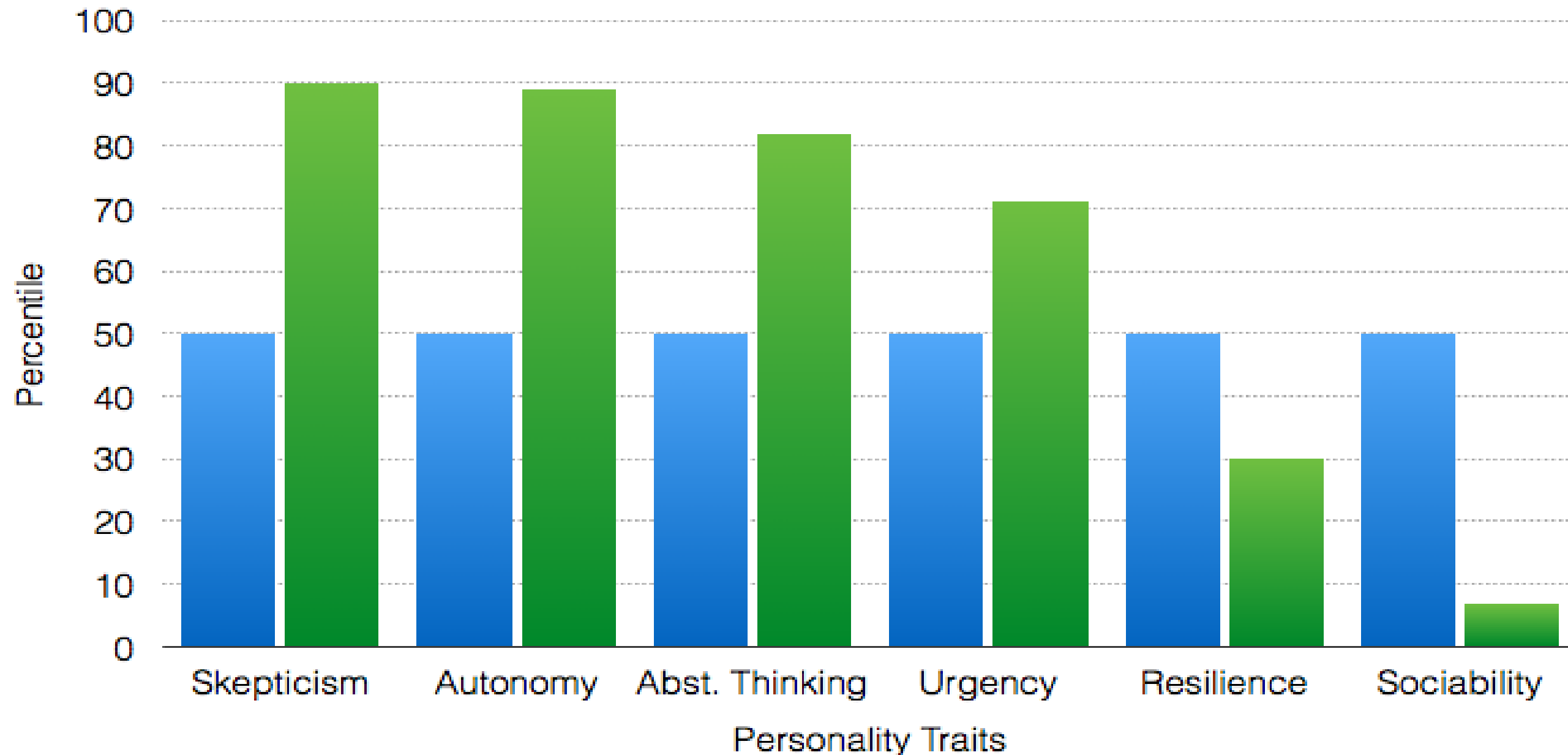
The lawyer brain dilemma

**When your only tool is a hammer,
everything looks like a nail**

How we are taught to think and how we
work,
our fire-walling mindset,
does not serve us
in growing our firm

To grow the firm one
must be
pathologically
optimistic

The 6 Predominant Lawyer Personality Traits



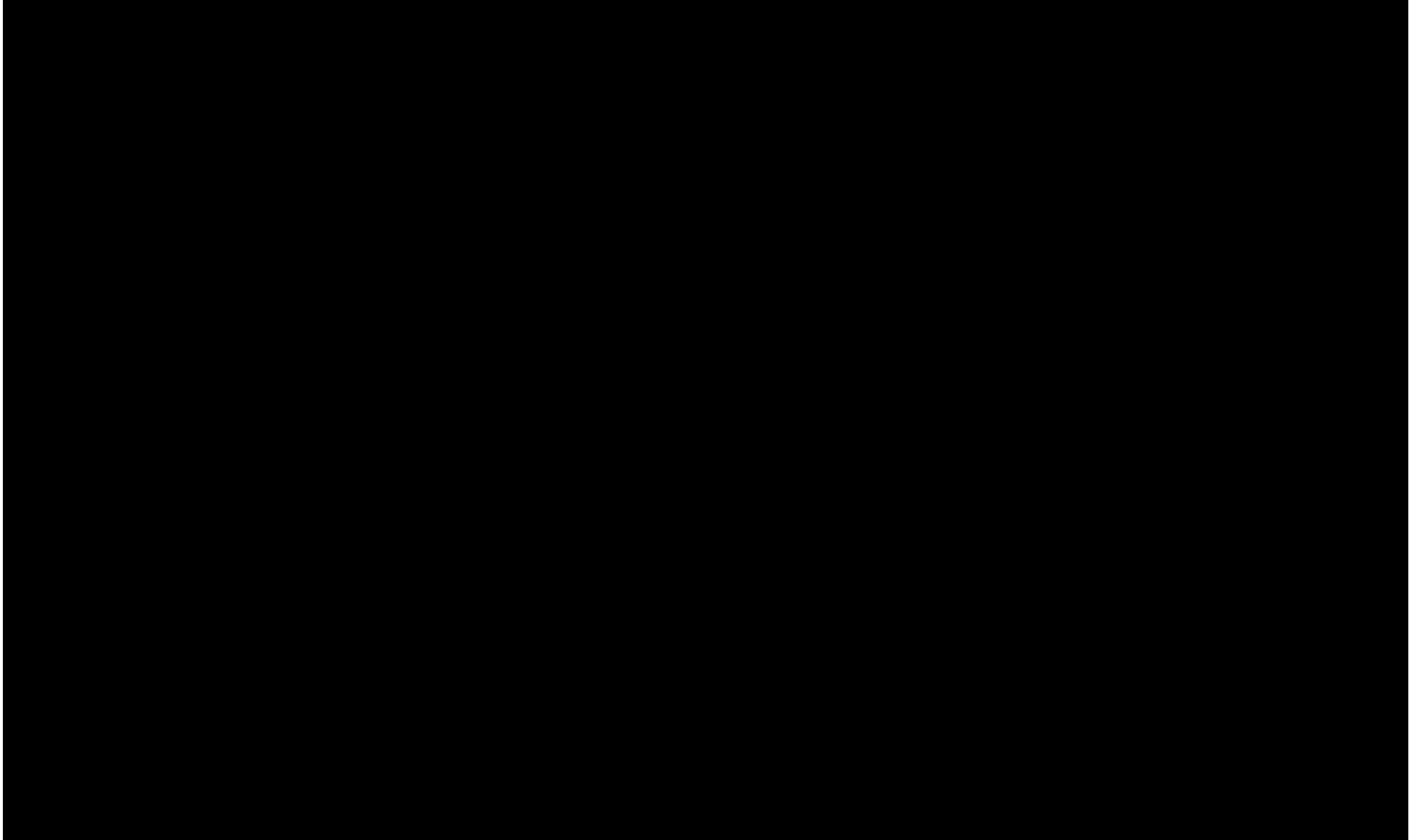
■ General Public (50th Percentile)
■ Lawyers

From the research of Larry Richard, Ph.D.

New, different tools are
needed

Start with this truth:

**We act according to our
self image**



The situation:

- We don't know what we are doing
- We've never done it before
- We have no clients
- We are not sure how to get clients
- We have very limited funds
- We want to start a law firm

The resilience issue

Is the situation a threat
or challenge?

To grow resilience, find
your purpose and nurture
your network.

**The entrepreneur-lawyer
sees opportunity and
begins to plan**

Planning

What does it look like?

Brain storming

Imagining

Talking

Writing

Fact gathering

Relationship building

Finding mentors & guides

Creating a network

Why plan?

It's essential for success

It can protect you from the fire-
walling mindset

It will give you a distinct
advantage over the competition

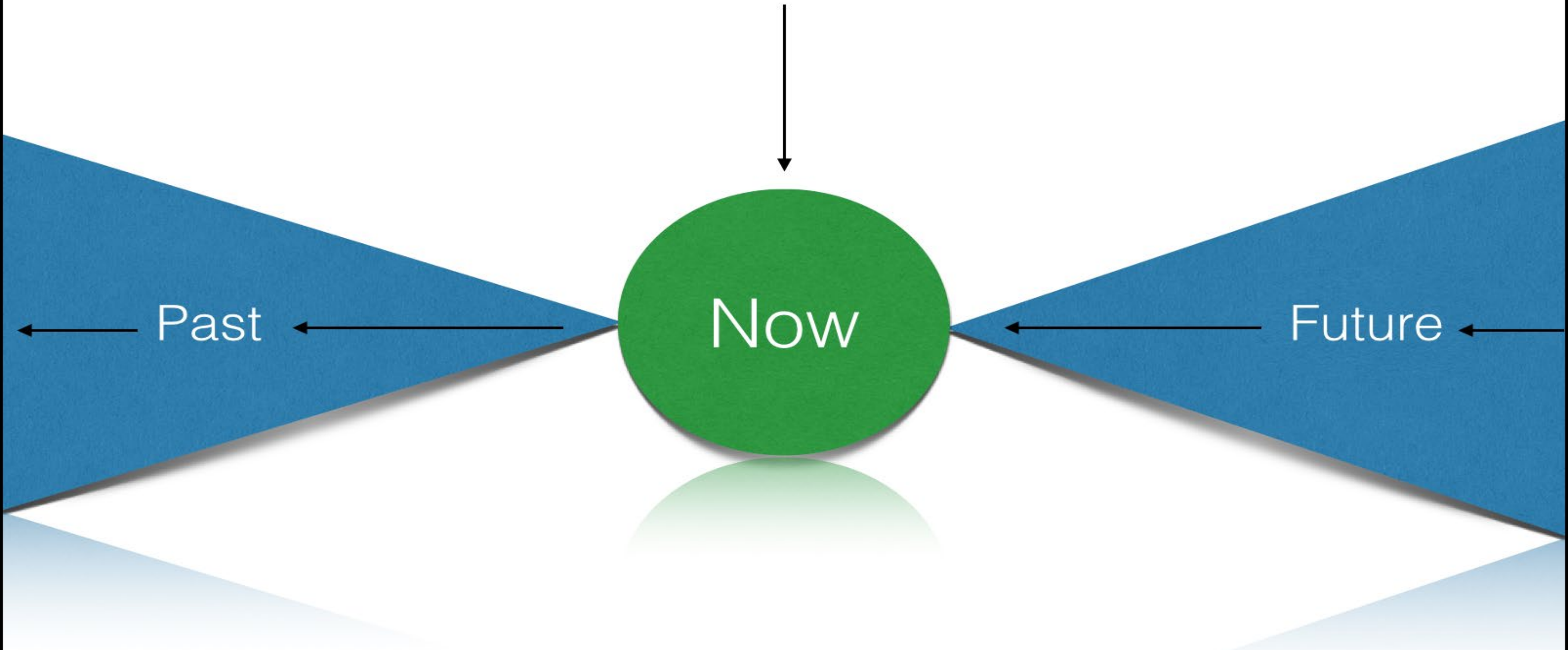
**Planning is a gerund
(a noun derived from a verb).**

**Planning is an action, not
an end in itself.**

**The plan does not have to be
perfect.**

The entrepreneur-lawyer
plans but also
understands the power of
now

The only moment for action or omission



How do you plan?

Pay a visit to your self-image

Get permission to plan

Form the intention

Visualize it

Concept map it

Work the template

Test drive it

The goal -

actualization

not perfection

Planning for profit

Know your break-even point

Know the cost of problem solving

Know the value of a productive hour

The value of a
productive hour
is the cost of compensated
problem solving needed to
survive

The calculation:

- Total revenue needed to cover professional & personal expenses
- Divided by 50 weeks
- Divided by five days
- Divided by the average number of productive hours in a day

$$E/50/5/3 = PH$$

You may average two to
three productive hours a day
for this & other reasons

\$200,000 in annual expense

- \$200,000 divided by 50 = \$4,000 a week
- \$4,000 divided by five = \$800 a day
- \$800 divided by three = \$266.67

The cost of problem solving is
\$266.67 for this law firm.

Billing and collecting at \$300 an
hour generates \$25,000 profit.

\$200,000 in annual expense

- \$200,000 divided by 50 = \$4,000 a week
- \$4,000 divided by five = \$800 a day
- \$800 divided by **four** = \$200

The cost of problem solving is now
\$200 for this law firm.

Billing and collecting at \$300 an
hour generates **\$100,000 profit.**

Break-even: at what point do you become profitable?

- Determine your total fixed costs (the costs that don't vary with revenue);
- Divide total fixed cost by the difference between your matter price and its cost (margin/profit);
- That tells you the number of matters needed to break-even.

Break-even calculation:

- Your firm has \$5,000.00 in monthly fixed costs;
- You charge \$1,000 for each matter;
- Each matter costs you \$750;
- $\$5,000$ divided by $\$250 = 20$ matters each month to break-even

Break-even calculation:

- Your firm has \$10,000.00 in monthly fixed costs;
- You charge \$5,000 for each matter;
- Each matter costs you \$1,500;
- $\$10,000$ divided by $\$3,500 = 2.85$ matters each month to break-even.

The lower the overhead,
the higher the margin,
the more quickly you
show profit

Collected fees determine
profit.

For the client, fees are
driven by emotion & value

**When is a prospective
client's need for your
problem solving at its
peak?**

Why is this important?

**Planning for the
problem solving**

**Answer the who, what, when, where
why & how of the problem**

**Learning your client's cycle: the
problem recognition process**

Planning for the problem solving

How does your client experience the problem
solving?

Does your client see your work?

What does the solution
look & feel like?

Why does a client chose you?

Price?

Value?

Location?

Characteristics of the entrepreneurial small firm

Steps back & strategizes

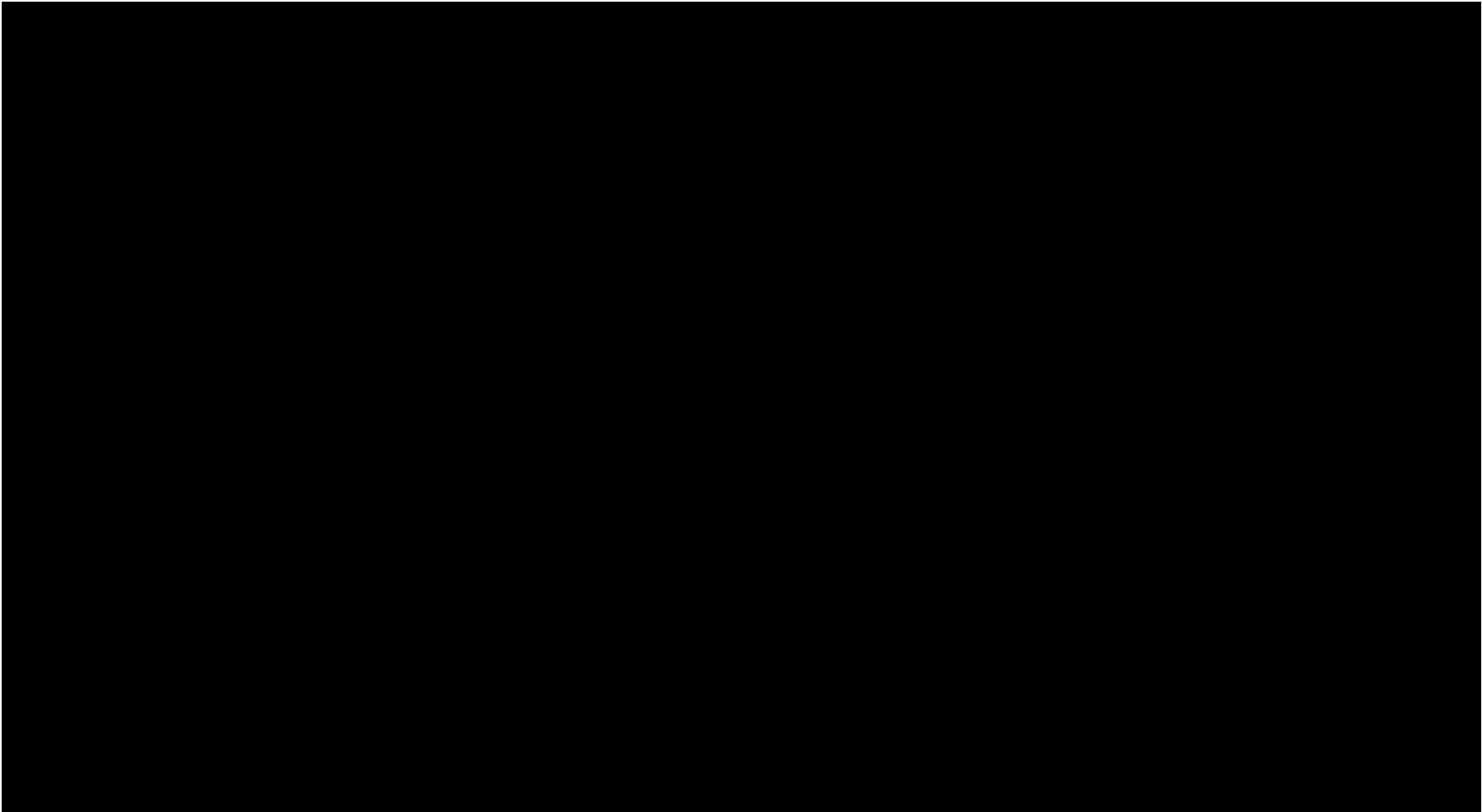
Sees problems as opportunities

Can live in the weeds & not get lost

Will spend money to make money

Understands the client's need

Able to say "no"



**Lawyers often focus
intensely on:**

The firm name

The firm entity

The firm business card

To make the launch meaningful &
efficient:

**Focus on the client & the problem
you solve, then proceed ahead**

It's not the kite, it's the air.

The law firm name

Rules 7.1 & 7.5

DC Rules of Professional Conduct

**Don't mislead, don't confuse, don't sound like
something you are not**

If the firm is me,
me is not a *Group* &
not *Associates*

But *me* can be a *Firm*

[Legal Ethics Opinion 332](#)

The Mills Family Law Firm

**Be cautious about
the unique name**

Startup naming concepts

Unique name example: *Ipseity Law*

Ipseity, from the Latin word *ipse*, meaning “itself”

“Ipseity reminds me of my core self,

the me beneath all layers of adaptation & personality,

and that’s why I choose Ipeity Law for the

name of my small firm.”

**Test drive
the firm name**

How to Choose a Name for a Law Firm

Consider a logo

99.designs.com

[Best Law Firm Logos](#)

[Law Firm Logos on Pinterest](#)

[Logo basics](#)



Whose problem does this firm solve?

The small firm's office

How, when & where you will solve your clients' problems drives the need for an office

DC does not have a physical presence
requirement

But if you are working from an office (home) where
you are not barred, you may need a professional
address in DC.

Carr WorkPlaces is
a DC Bar member benefit

**OSI Offices has nearly 1000 tenants & about half
are lawyers**

1629 K Street Suite 300

Washington, DC 20006

Avoid UPL

DC Rule 5.5 bars a DC Bar member from the unauthorized practice of law in another jurisdiction.

Be careful to whom you email.

The entity

Know why you need an entity

Sole proprietor is an option

Resources on forming a business in DC

Useful information from DCRA

Know about estimated taxes

DC recognizes PLLC

Your firm needs an EIN

Apply to the IRS for an Employer
Identification Number

Use your firm's EIN to open its business
checking account

Small firm bank accounts

- **The business or operating account**
- **The DC IOLTA, assuming there are IOLTA eligible funds**
- **The Trust Account for a single client or case, if needed**

Firm communication

Your obligation in Rule 1.4

Be an active listener

Use an identifiable phone number

Use a professional email address

Have an appropriate business address

Be responsive

How to sound confident on the phone

Consider CallRuby or Smith.ai

Malpractice Insurance

It is not mandatory in DC

An entity will not protect you

It is best to have coverage

USI Affinity is our member benefit

Small Firm Tools

Laptops

Desktops

Chromebooks

Tablets

Manufacturer tech support

In-store tech support

Printers (all-in-one & dedicated)

Scanners

Dymo label/stamp printer

Phone system



Sara Kropf • 1st

Defending executives and businesses in federal criminal investigations and business...

1d • 

I'm going to let you in on a little secret. <whispers> It isn't very hard to start your own law firm. Here's all you need:

1. A computer
2. A domain name for email and website
3. A website (use a template to start)
4. Malpractice insurance
5. A corporate entity
6. An operating and IOLTA account
7. Basic software (Office365/G Suite; Adobe)
8. A telephone number

That's it.

I'm exaggerating a bit, of course, but the logistics of starting a law firm are easier than ever. Post-pandemic, you definitely do not need an office.

Of course, there is one very important thing you'll also need: confidence. A lot of it. You need to be confident that you can bring in clients. Maybe you have already had success as your prior firm. (I didn't.) Or maybe you are just sure that someone somewhere will hire you. (I was.)

If you need a pep talk to take the plunge, get in touch.

Estimated expenses

The annual range:

Low - no staff & office-on-demand

\$10,000 - \$20,000

High - staff & office space

\$115,000 - \$175,000

Funding sources

Personal funds - the more, the better

Family & friends - be careful

Credit cards - be even more careful

Bank & SBA

Business incubator program

[Rule 5.4\(b\)](#) is NOT for a lender

Funding guidelines

Create funding milestones

Bootstrapping is better

Do a cash-flow analysis

Estimate revenue realistically

Know fixed & variable costs

Use GAAP

Tie the Plan to funding

Request startup spreadsheets at PMAS@DCBar.org

Marketing

Educate, inform, network

A good, professional photo

A presence in social media

A good business card

Make it easy to be found

Focus on the problem & it's solution

Michelle C. Thomas



www.eliturner.com

Resources

[DC Bar resources](#)

[DC Bar Communities](#)

[DC Bar CLE](#)

[SoloSez](#)

[MILO](#)

[Lawyerist](#)

[AttorneyAtWork](#)

[Our newsletter](#)

Backup data
Backup yourself

Backup data to a safe, encrypted external hard
drive and/or the cloud

[Backblaze](#) [Carbonite](#) [Reviews](#)

[Rule 1.3, Comment 5](#)

[DC App. R. XI, §15\(a\)](#)

Request the Agreement for Emergency Backup
Services

Growth

Do you really need a partner?

[Lawclerk.legal](#)

[Montage Legal Group](#)

[Lawyer Exchange](#)

[UpWork](#)

How do small firms increase revenue?

- By adding clients
- By increasing fees
- By selling more services to current clients
- By adding lawyers to increase bandwidth

Best according to Clio
Legal Trends

Where to find virtual staff?

- [upwork.com](https://www.upwork.com) (My personal favorite)
- [freelancer.com](https://www.freelancer.com) (general VAs - all categories)
- [fiverr.com](https://www.fiverr.com) (everything from powerpoint to logos to research and article writing for \$5)
- atlasvirtualparalegal.com
- [99designs.com](https://www.99designs.com) (logo and graphics)
- [guru.com](https://www.guru.com) (great pool of admin and paralegal support)
- [virtualparalegalservices.com](https://www.virtualparalegalservices.com)
- [thevirtualparalegal.com](https://www.thevirtualparalegal.com)
- [starrparalegals.com](https://www.starrparalegals.com) (bankruptcy specialty)
- [flex-counsel.com/](https://www.flex-counsel.com/)
- [equivityva.com](https://www.equivityva.com)
- Off-line options:
 - local colleges

The small firm
lawyer is a
business owner

You depend on your community.
Be a good citizen.

How do you do that?

By answering these questions:

Why am I here?

What's going on around me?

What am I going to do about it?

How will my actions affect others?

The result:

Clarity

Awareness

Ability to adapt &
shape circumstances

Resilience

Rules drive behavior

Rules set a standard of care

Some say "shall", some "may"

Rules drive how we manage

Managing is simple

It's figuring out what to do

Doing it habitually

Creating good habits

Making checklists

Creating workflows

Following-up

**Managing gets
complicated
when it's neglected**

The upside of managing

You are above the
standard of care;

You are building credibility;

Clients are happy;

Others are impressed;

You have space & time to be a
lawyer

The downside of neglecting

You are vulnerable

**You spend more time on your
problems & less on client problems**

You live & work under a dark cloud

Good management takes
less time than bad
management

Getting started

Form the intent

Create the time & space

Pick a tool

The tools

Pens & paper

Computer & software

The Plan

Concept mapping

Spreadsheets & databases

Calendar

The power of now

&

the power of no

Client intake

Draft the process of how
a PC becomes a C

Going from Prospective Client to Client

Create the intake form

Client intake triggers

Rule 1.18

How are you contacted?

How do you document?

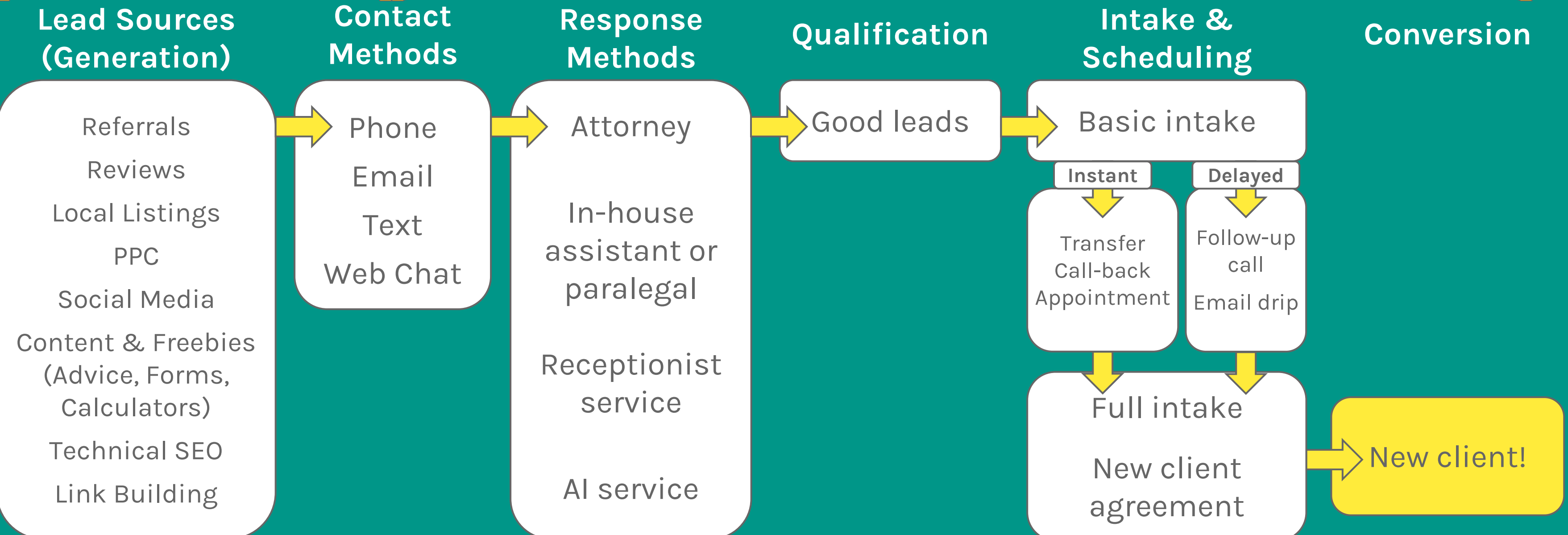
What do you create?

How do you protect?

LEAD CONVERSION FLOW

GENERATE

CAPTURE



Qualification Future Clients & Good Will



Would you put your intake
form on your website?

Bailey & Galyen has several here

Does it need a disclaimer?

At what point do you have a
"prospective client"?

Managing referral sources

Harvest this information
Thank them without violating

Rule 1.6

Market to referral sources

File creation, organization
& maintenance

**How you organize this process will
impact you & the client.**

**How you carry it out will be key to
your client's solution & to your
success.**

It once was this simple

United States
v
John Edwards
file



Abbe
Lowell

**Client data now has multiple forms,
formats & locations**

Paper

Digital

Images

Video

Audio

Various formats / various devices

It is all a part of the client
file

LEO 333

Know what & where the data is;

Organize it, protect it, back it up;

Manage it & keep it useful;

It belongs to the client.

**Are you preserving
texts?**

Phoneview

Messages

Documenting text messages

How to save text messages using

Android or iOS

Sample file workflow

Client intake tool / Conflicts check

New matter sheet

Calendar system

Billing system

Case management system

Ideally all should be synced

Conflicts checking

resources

(LA, not DC compliant)

Request our Conflict of Interest Systems
publication / dmills@dcbar.org

Sample client/problem workflow

Client intake completed

Fee Agreement

Communication protocol

Cause of action / SOL

Notice issues

Pleading preparation

File closing workflow

Review scope in the fee agreement

Disengagement/status client letter

File organization & closing

Billing status & conclusion

Client trust account status

Archiving the file & data

Take aways for the Plan

Time & billing workflow

Client established

Fee agreement reviewed

Data entry following action

Draft of report

Finalize & send

Followup

Communication workflow

Client established

Fee agreement reviewed

Initial client letter

Work product transmission

Third party information

Status reports

Disengagement / conclusion / file

Management Tools

Clio a DC Bar benefit

Rocket Matter

MyCase

Cosmolex

The Form Tool

Smokeball

Lawyerist Reviews

Staff

How to determine the need

How to determine the cost

\$70K is really \$88K

Keep payroll well below 40% of revenue

How to Evaluate Law Firm Financials

Hiring resources

[Mechanics of hiring](#)

[eGuide to hiring](#)

The uniqueness of [Rule 1.6](#) in DC



Kenneth P. Vogel ✓

@kenvogel

Follow

Here's a photo of Ty Cobb & John Dowd casually & loudly discussing details of Russia investigation at @BLTSteakDC while I sat at next table.



11:10 PM - 17 Sep 2017

6,218 Retweets 13,078 Likes



What checking accounts do I need?

- **Operating (business) checking account - a commercial checking account for your firm**
- **IOLTA Trust Account (assuming you have IOLTA eligible funds) Create with the IOLTA Registration Form**
- **Trust Account for a single client or case (only if you have a non-IOLTA eligible fund that will generate interest for its owner)**

IOLTA eligible funds . . .

- **Must be held in an approved IOLTA bank;**
- **Are funds that are nominal in amount, or**
- **Held for a short period of time;**
- **Such that effort to administer consumes interest income.**
- **Example of an account name: *Daniel M. Mills DC IOLTA Account;***
- **Interest goes to the DC Bar Foundation for pro bono legal services.**

Three exceptions in Rule 1.15(b) & (e)

- **“ . . . when the lawyer is otherwise compliant with the contrary mandates of a tribunal . . . ”;**
- **If you are licensed and principally practice in another jurisdiction and are IOLTA compliant there; Rule 1.15(b);**
- **“unless the client gives informed consent to a different arrangement.” Rule 1.15(e)**

Trust Account Records

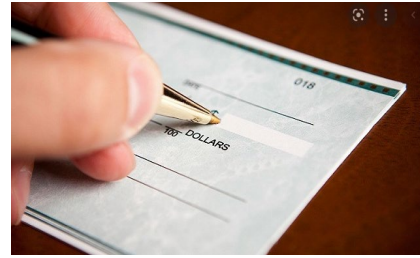
- What are you required to keep? *Complete records*
- Rule 1.15(a);
- How long? . . . *for a period of five years after termination of the representation.* Rule 1.15(a);
- But is it ever safe to destroy trust account records when there is no statute of limitation on a Bar Complaint?

Complete records?

- **What are complete records of a trust account transaction?**
- **If Disciplinary Counsel cannot figure it out from your records, then your records are not complete.**
- ***In re Donald A. Clower*, 831 A.2d 1030, DCCA 2003.**

- **“Complete records” tell the full story of how the lawyer handled the money and whether the lawyer followed the Rules;**
- **If the records show what happened and that you complied with the Rules, then they are complete;**
- **“The reason for requiring complete records is so that any audit of the attorney’s handling of clients funds by Bar Counsel can be completed even if the attorney or the client, or both, are not available.” *In re Clower* at 1034.**

Managing Money



When the lawyer comes into possession of an IOLTA eligible fund



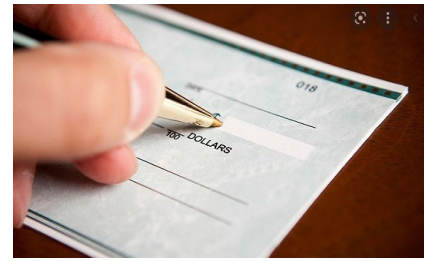
IOLTA account



Operating account

So where does the money go?

If the Fee is an ...



Advance Fee



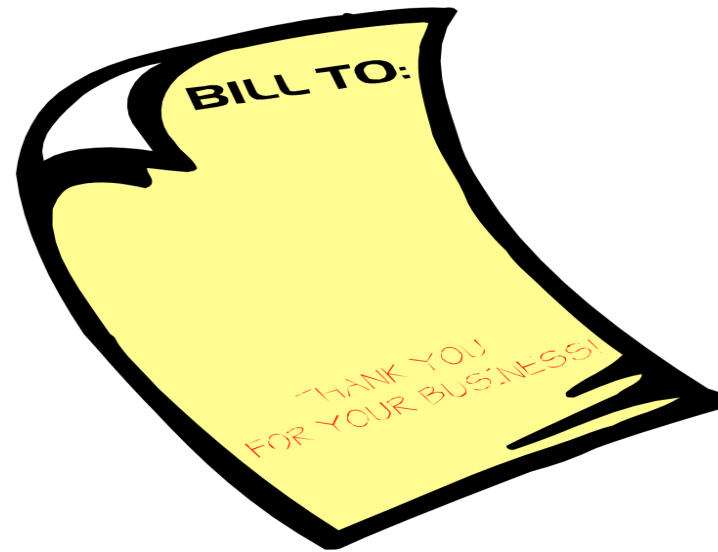
It goes in your...

IOLTA Account

Then you....



Perform the work



Send invoice

And then...

Move the money per your fee agreement ...

From



IOLTA



To



Operating

These separate accounts can be at the same bank or different banks

What if you get paid after the work is performed?



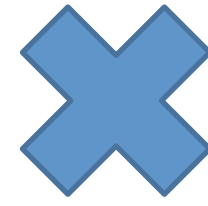
Then you deposit straight to...



Operating Account



NEVER



Advance Fee



Operating Account

UNLESS.....

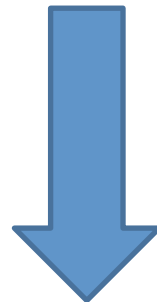
You obtain the client's "Informed Consent" to deposit their money into your operating account - Rule 1.15(e).

Best Practice Tip: Don't Do This!



NEVER 

Your Money



IOLTA Account

Except....

You can put your own money into an IOLTA Account pursuant to D.C. Rule 1.15(f) which says...

Nothing in this rule shall prohibit a lawyer from placing a small amount of the lawyer's funds into a trust account for the sole purpose of defraying bank charges that may be made against that account.

In Re Mance

980 A.2d 1196 (D.C. 2009)

- A flat fee is now an advance fee when it is paid before work begins
- Rule 1.15(e) applies - it must be entrusted
- Flat fees go into the IOLTA Trust Account
- The fee agreement determines how and when you earn the fee
- A lawyer cannot earn a fee for doing nothing. *In re Sather*, 3 P.3d at 414

When does a flat fee go into the operating account?

- When the work is done and the fee is earned.
- If a flat fee is paid after the work is performed, it goes into the operating account.

Availability - What's that?

- **Flat fee for work is not an *engagement retainer* (classic definition)**
- **Engagement retainer refers to availability, if required**
- **Flat fee for a task-based matter covers all the work to be done**
- **LEO 355 - Flat Fees & Trust Accounts**
- **Availability gigs are rare and unique**

Rule 1.15(e) informed consent - what is needed?

- **Flat fees normally are entrusted**
- **Un-entrusted fee will be treated as the lawyer's property**
- **Lawyer must work for the fee to keep it**
- **Lawyer must explain the benefit or service**
- **Lawyer must refund any fee not earned**
- **Fee is subject to the lawyer's creditors**

What is the message sent by this?

IN RE KENNETH A. MARTIN

NO. 11-BG-775 DCCA February 13, 2014

- **If a client, *with reasonable promptness*, disputes a lawyer's fee after it has been withdrawn from the trust account, the lawyer must return the disputed sum to the trust account;**
- **Unearned fees that must be returned to the client under Rule 1.16(d) include an arbitration award in favor of the client.**

Be alert for the scam

- **It's very sophisticated now;**
- **It involves a check to deposit in your trust account and fees for you;**
- **The scammer will want funds wired;**
- **Wait for the check to clear. That is the only way to know if it is a fake check.**
- **And use a unique procedure under the UCC for added protection.**

And if you want to be safe . . .

- **Ask the bank to send the check for “collection” (UCC 4-501);**
- **Allows for positive confirmation the check has been paid before any funds are disbursed.**

Ethics help . . .

- From the DC Bar, it is free & confidential;
- Hope Todd, Saul Singer, Nakia Matthews & Erika Stillabower;
- 202-737-4700 ext 1010
- ethics@dcbar.org

Practice Management

- **Dan Mills / 202-780-2762**

dmills@dcbar.org

October 30 session

In the business plan template, draft your firm's Mission Statement, the General Firm Description & create a concept map of your strengths & weaknesses as a small firm lawyer.

(page five of the Business Plan template)

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