

As part of our Law Firm Leaders series, Northstar Conferences created this unique program which addresses the distinct issues facing the next generation of leaders.

In attending this conference, you will meet a distinguished faculty of law firm innovators, network with new and tenured partners, and engage in the lively exchange of ideas, insights and best practices for leaders like yourself.

Co-Chairs

BRIAN K. BURKE
Chair and Chief
Executive Officer
Baker & Daniels LLP

SCOTT DEVRIES
Managing Partner
Nossaman, Guthner, Knox, &
Elliott, LLP

THE LAW FIRM LEADERSHIP INSTITUTE

For the Next Generation of Leaders

General Session

March 21-22, 2007

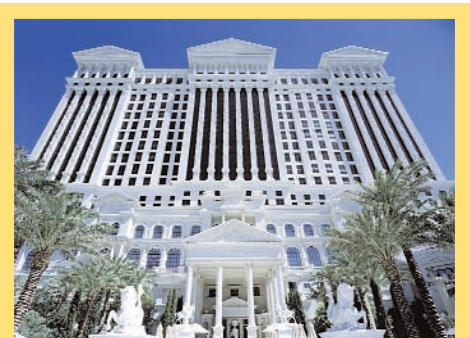
Post-Conference Workshop

March 23, 2007

Caesars Palace
Las Vegas, Nevada

Goals for this exciting program are:

- To educate emerging law firm leaders on what counts in the leadership of the firm
- To engage new and existing law firm leaders in taking on new responsibilities within the firm
- To help law firm leaders embrace the management skills that are necessary for the continuing success of the firm





WHERE PROFESSIONAL GROWTH AND BUSINESS DEVELOPMENT MEET

NorthStar Conferences, a wholly-owned subsidiary of the AICPA, provides an educational forum for information sharing and knowledge building. The NorthStar brand offers senior level executives a learning environment that delves deeper into the issue, creates opportunities for exchanging ideas with peers, and provides insight from the interaction between industry leaders and experts.

BUSINESS DEVELOPMENT OPPORTUNITIES

NorthStar offers customized sponsor and exhibitor packages at our industry-specific conferences. Showcase your products and services while networking with decision-makers in a non-trade show environment. Whether it's hosting a networking cocktail or luncheon reception, our sponsor and exhibitor benefits bring you closer to your clients and prospects. Find out how we can assist you with your business development initiatives by calling David Schneider today at 201-938-3020 or via e-mail at dschneider@aicpa.org.

NORTHSTAR CONFERENCES *Presents*

THE LAW FIRM LEADERSHIP INSTITUTE *For the Next Generation of Leaders*

General Session
March 21-22, 2007

**Post-Conference
Workshop**
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Dear Colleagues:

Our committee has carefully assembled some of the most talented trainers and consultants serving the law profession today to help the next generation be better equipped for their new role. The robust agenda offers a multi-dimensional approach, including sessions to build soft skills and expose the participants to the issues they must deal with as leaders — as well as to encourage camaraderie within a group of peers. Sharing insights, experiences and frustrations will enrich the experience for everyone, as the emerging partners help each other learn to deal with the demands of leadership. We realize that leadership training is a complex process that cannot be easily or quickly accomplished. Attendees will leave this program with a greater awareness of the expectations that will be placed on them and a better understanding of how to meet and exceed those expectations.

**Please note that space is limited –
reserve your seat today!**

**Call 1-866-265-1975 or register online at
www.northstarconferences.com**

CO-CHAIRS

Brian K. Burke
Chair and Chief Executive Officer
Baker & Daniels LLP

Scott DeVries
Managing Partner
Nossaman, Guthner, Knox, & Elliott, LLP

WORKSHOP CHAIR

Heather Edes
Director of Professional
Development
Sullivan & Worcester

FACULTY

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Principal
Altman Weil, Inc.

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Managing Partner
JD Partnership

Dan DiPietro
Head, The Law Firm Group
The Citigroup Private Bank

Patrick Dunican
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Patrick J. McKenna
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Robert Millard
Partner
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Consultant
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Robert Shuftan
Managing Partner
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AGENDA

WEDNESDAY, MARCH 21, 2007

8:00-8:45 **REGISTRATION AND CONTINENTAL BREAKFAST**

8:45-9:00 **WELCOME & INTRODUCTIONS**

Brian K. Burke
Chair and Chief Executive Officer
Baker & Daniels LLP

Scott DeVries
Managing Partner
Nossaman, Guthner, Knox, & Elliott, LLP

9:00-9:30 **KEYNOTE SESSION – THE FIRST 100 DAYS: MAKING YOUR FIRST STEPS**

It may not be fair, but it's true: your first few months as Managing Partner—the time when you are just starting to grasp the totality of your new job—may well turn out to be the most crucial in setting the stage for a tenure that hopefully should last for years. Everything you do and say will send messages, set tone, establish expectations, and communicate direction about what is of priority to you. This session will explain the critical six steps to help guide your First 100 Days.

Patrick J. McKenna
Partner
Edge International

9:30-11:00 **ENHANCING YOUR LEADERSHIP INFLUENCE**

It is challenging enough to lead those who agree with us, but others to willingly follow us when they are initially skeptical or opposed to our goals is the greatest challenge facing aspiring leaders.

In this session participants will engage in a number of interactive exercises designed to help them learn a set of techniques drawn from proven principles of social psychology. As a Managing Partner, you will be able to employ these techniques, as soon as you return to your office, to enhance your influence during any face-to-face or group interaction.

Patrick J. McKenna
Partner
Edge International

11:00-11:15 **REFRESHMENT BREAK**

11:15-12:30 **HOW TO DEAL WITH THE HARD ISSUES**

This session will discuss:

Tactical Issues

- Effectiveness of compensation system
- Going from player to coach in one step
- How to deal with your contemporaries
- Interpersonal issues
- How to deal with HR issues

Partner Issues

- What to do with underperforming partners
- Adequacy of communication with partners
- How to deal with the more experienced lawyer

Thomas S. Clay
Principal
Altman Weil, Inc.

Joan Newman
Consultant
Joan Newman & Associates

12:30-1:30 **LUNCHEON**

1:30-2:30 **BALANCING LEADERSHIP AND PRACTICE**

This session will help you determine whether or not you can indeed balance leadership and practice. You will discuss issues such as:

- If you are at a large firm, is there anything to balance?
- If you do practice, you must be willing to delegate to a well respected senior team
- If you are in Advisor role, then long trials and business transactions are not possible

Ron Beard
Partner
Zeughauser Group

2:30-3:30 **TIME MANAGEMENT**

This session will focus on:

- Achieving your highest priorities
- Increasing productivity by identifying and focusing on top priorities
- Enhancing success by setting goals that align with important objectives
- Keeping focused with an organized planning system
- Managing email, voice mail and US mail effectively
- Reducing stress by eliminating low priority activities

Wayne Davis
Managing Partner
JD Partnership

AGENDA

3:30-3:45 AFTERNOON BREAK

3:45-5:00 MARKETING AND SALES

This session will focus on the internal and external aspects of marketing, sales and public relations within the firm, including a mock press interview.

Wayne Davis
Managing Partner
JD Partnership

Gene Grabowski
Senior Vice President
Levick Strategic Communications, LLC

5:00-6:00 NETWORKING RECEPTION

7:00 COMMUNITY BUILDING DINNER
(Optional Session, additional fee)

THURSDAY, MARCH 22, 2007

8:00-8:30 CONTINENTAL BREAKFAST

8:30-9:45 CREATING AND SETTING EXPECTATIONS

- What do you do about the practice?
- New Managing Partners devote most or all of their time to the firm: how much client work gets done, and what happens to the client?
- Identifying how long you are going to be in this role

Brian K. Burke
Chair and Chief Executive Officer
Baker & Daniels LLP

Scott DeVries
Managing Partner
Nossaman, Guthner, Knox, & Elliott, LLP

9:45-10:45 WHAT'S IN THE FINANCIAL DNA OF HIGHLY SUCCESSFUL FIRMS?

This session will:

- Discuss the traditional law firm business model, the stresses the model is facing and how some firms have positioned themselves to succeed in a highly competitive environment
- Draw on data from Citigroup's recent study, *Law Firm Profitability: Drivers of Superior Performance*, a five year trend analysis of 153 US based firms broadly representative of the legal industry, to describe the most critical financial drivers of success
- Discuss benchmarks for optimum levels of debt and capital

Dan DiPietro
Head, The Law Firm Group
The Citigroup Private Bank

10:45-11:00 MORNING BREAK

11:00- 12:00 FUNDING THE FIRM — FINDING THE RIGHT BALANCE BETWEEN DEBT AND EQUITY

- What is the purpose of partners equity?
- How much equity does your firm need?
- What are the funding options?
- What do your peers do?
- An alternative perspective on the "best" capital structure

Andrew Johnman
Relationship Director
Professional Services Team
Barclays Bank PLC

12:00-1:00 LUNCHEON

Sponsored By:  **BARCLAYS**

1:00-2:00 HOW IMPORTANT IS FIRM CULTURE TO THE SUCCESS OF YOUR FIRM?

This session will equip new leaders to understand the links between culture and strategy, and how to proactively evolve culture to drive strategy.

- What a law firm's culture is and what it is not
- What aspects of culture have the closest correlation to profitability?
- Defining and describing culture: an overview of tools
- How to evolve the firm's culture to align with its strategy

Robert Millard
Partner
Edge International

2:00-3:00 HOW TO CREATE A VISION

This session will discuss the issues new Managing Partners face when challenged with creating a vision for their firm.

Patrick Dunican
Managing Director
Gibbons PC

AGENDA

3:00-4:00 **DEFINING THE ELEMENTS OF AN EFFECTIVE LAW FIRM LEADERSHIP PROGRAM**

This session will discuss:

- Current state of leadership development in the profession, needs and state of the art
- Defining categories of leadership
- Critical components of a leadership development program
- Things to avoid in order to have a successful program
- Leadership competencies: what are they and how do you define and use them in program development?

Thomas S. Clay
Principal
Altman Weil, Inc.

4:00 **GENERAL SESSION ADJOURNED**

FRIDAY, MARCH 23, 2007

7:30-8:15 **REGISTRATION AND CONTINENTAL BREAKFAST**

8:15-12:00 **POST-CONFERENCE ROUNDTABLE WORKSHOP**
(Optional Session)

***Women in Leadership:
The Next Generation of Leaders***

Post-Conference Chair
Heather Edes
Director of Professional Development
Sullivan & Worcester

Workshop Leader
Joan Newman
Consultant
Joan Newman & Associates

This post-conference roundtable will offer you the opportunity to share your insights and experience as a law firm leader. Be prepared to discuss the challenges you face on a day-to-day basis and get answers to the tough questions. The following topics will be covered with emphasis on the challenges facing women leaders:

- Communication styles
- Perceptions as a leader
- Work/life balance
- Networking skills
- Managing your practice area/firm
- Effecting change within your firm

12:00 **POST-CONFERENCE ADJOURNED**

If you can't make the conference, purchase the Multi-media CD-ROM!

A Multi-media CD-ROM (which includes the audio recording and the conference materials) plus the conference handbook are available for purchase at the following prices: (NY and NJ residents add appropriate sales tax.)



Multi-media CD-ROM only: \$395

Conference Handbook and Multi-media CD-ROM: \$445

To order these items, simply check the appropriate box on the registration form and provide credit card information or payment. All materials will be shipped within six weeks of the conference.

REGISTRATION

SINGLE REGISTRATION FEE

\$1,595 Conference Only (March 21-22, 2007)
\$1,795 Conference and Workshop (March 21-23, 2007)
\$595 Workshop Only (March 23, 2007)
\$75 Optional Community Building Dinner (March 21, 2007)

SPECIAL DISCOUNTS

Group Discount (2-9 participants, each): \$100 off
Early Bird Discount (register by 2/8/07): \$100 off
• Discounts are not applicable to Workshop Only registration.
• Maximum combined discount allowed is \$200 off single registration fee.

PAYMENT AND CANCELLATION POLICY

Full payment must accompany registration form. You may pay by check, Visa, MasterCard, American Express or Discover. Payment includes the cost of continental breakfast(s), luncheon(s), refreshment breaks, cocktail reception and handbook. Federal Tax ID #06-1623588. Cancellations are subject to a non-refundable \$200 administrative fee. Substitutions are permitted. To receive a refund, your written cancellation must be received by March 9, 2007. You are responsible for payment in full if not cancelled before March 9, 2007.

HOTEL ACCOMODATIONS

Caesars Palace
3570 Las Vegas Blvd., South
Las Vegas, NV 89109
Hotel Phone: (702) 731-7110
Hotel Reservations: 800-634-6661 (Reference Group Code SCAIC6)
Rate: \$199 (Tue-Fri)

The hotel has set aside a block of rooms at a special discount price for conference attendees. The cutoff date for the special rate is 2/21/07 or earlier if the room block is full. You must mention that you are attending **The Law Firm Leadership Institute** to be eligible for the special discount. **Please do not book hotels and/or flights until after you have received confirmation of your registration.**

CONTINUING EDUCATION CREDIT

NorthStar Conferences LLC is a wholly-owned subsidiary of the American Institute of Certified Public Accountants (AICPA). This conference was prepared in accordance with the Joint AICPA/NASBA Statement on Standards for Continuing Professional Education (CPE) Programs effective on January 1, 2002. The recommended CPE Credits are in accordance with these standards; however, your individual state board is the final authority on the acceptance of programs for CPE credit. For more information regarding administrative policies such as complaints and refunds, please contact NorthStar offices at 1-866-265-1975.

Course Level: Beginner
No prerequisites and/or advance preparation is required.
Recommended CPE credit:
Main program: Up to 13.5
Workshop: Up to 3.5

CLE Applications for Continuing Legal Education Credits vary from state to state. Please contact us to see if CLE has been applied for in your state. NorthStar Conferences has a financial hardship policy in place. For more information contact Customer Service at 1-866-265-1975

CONFERENCE HANDBOOK AND MULTI-MEDIA CD-ROM

A Multi-media CD-ROM (includes audio recording and conference materials) as well as the hardcopy conference handbook are available for purchase at the following prices:

(NY and NJ residents add appropriate sales tax.)

Multi-media CD-ROM only: \$395
Conference Handbook and Multi-media CD-ROM: \$445

To order these items, simply check the appropriate box on the registration form and provide credit card information or payment. All materials will be shipped within six weeks of the conference.
IMPORTANT: Please call to confirm that the Multi-media CD-ROM is available for this conference prior to mailing payment with your order.

FOUR EASY WAYS TO REGISTER

PHONE*
1-866-265-1975 or 201-938-3700
(open until 5:00 p.m. EST)

FAX* (available 24 hours)
1-866-265-1976 or 201-938-3734

* Credit card registrations only

MAIL
NorthStar Conferences
PO Box 2210
Jersey City, NJ 07303-2210

ONLINE*
www.northstarconferences.com

The Law Firm Leadership Institute

General Session • March 21-22, 2007
Post-Conference Workshop • March 23, 2007
Caesars Palace • Las Vegas, Nevada
SESSION: #LFLEAD07 / R7035

Payment Options:

- ☐ Check enclosed (**Payable to NorthStar Conferences LLC**)
☐ American Express ☐ MasterCard ☐ Visa ☐ Discover

Account Number _____ Exp. Date _____

Signature _____

Please check the appropriate boxes: (copy this form for multiple registrations)

- ☐ Please register the following for:
- ☐ Conference Only – \$1,595 (March 21-22, 2007)
 - ☐ Conference and Workshop – \$1,795 (March 21-23, 2007)
 - ☐ Workshop Only – \$595 (March 23, 2007)
 - ☐ Community Building Dinner – \$75 (March 21, 2007)
- ☐ Group Discount (\$100 off for 2-9, each)
- ☐ Early Bird Discount (\$100 off if you register by 2/8/07)
- ☐ Other Discount: _____ VIP/Discount Code _____
(Discounts are not applicable to Workshop Only registration.)
- ☐ **I wish to purchase:**
- ☐ _____ Multi-media CD-ROM – \$395
 - ☐ _____ Complete Set - Handbook and Multi-media CD-ROM – \$445

Indicate number of Handbook/CD sets desired. NY and NJ residents must add appropriate sales tax %.

IMPORTANT: Please call to confirm that the Multi-media CD-ROMs are available for this conference prior to mailing payment with your order.

IMPORTANT! VIP Code (from mailing label) _____

Name _____

Title _____

Firm _____

Address _____

City/State/Zip _____

Phone _____

Fax _____

E-mail _____

Firm Size (# of attorneys) _____

- ☐ After attending, I wish to receive continuing legal education (CLE) credits for: State (s) _____ Bar # _____
- ☐ I do not wish to receive future promotions from NorthStar Conferences.

WHO SHOULD ATTEND?

- Senior Managers on the firm partner track
- New Managing Partners/Owners
(five years or less)
- Practice Leaders seeking partnership skills
- Leaders of high-profile projects, committees
and initiatives

RESERVE YOUR SEAT TODAY

HEAR FROM THE FOLLOWING FIRMS:

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Baker & Daniels LLP

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Edge International

Gibbons PC

Joan Newman & Associates

JD Partnership

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