



2024 APRL MID-YEAR MEETING
February 1-3, 2024

HOTEL DISTIL

101 W. Main Street, Louisville, KY 40202

THURSDAY, FEBRUARY 1, 2024	
2:00 – 4:00 pm <i>Grand Ballroom A</i>	Board Meeting
5:00 – 5:30 pm <i>Reserve Meeting Room</i>	New Members/First-Time Attendees & Leadership Reception
5:30 – 7:30 pm <i>Reserve Meeting Room</i>	Welcome Reception & Bourbon Tasting <i>Sponsored in part by Law Office of Peter L. Ostermiller, Esq.</i>
Beginning at 7:30 pm	Dine Arounds: 7:30 pm - Mayan Cafe with BrittaLes Gess (813 E. Market St.); 7:45 pm - Doc Crow's Southern Smokehouse and Raw Bar with Merri Baldwin (127 W. Main St.) 8:00 pm - Repeal Oak-Fired Steakhouse with Ron Minkoff (101 West Main St., Unit 101); 7:45 pm - Bourbons Bistro with Adam Koss (2255 Frankfort Ave.); 7:30 pm - Vincenzo's Italian Restaurant with Tracy Kepler (150 S. Fifth St.); 7:30 pm - Nami Restaurant with Stacy Rosenzweig (835 E. Main St.) 7:30 pm - La Bodeguita De Mima Cuban Restaurant and Rum Bar with Lauren Snyder (725 E. Market St.)

FRIDAY, FEBRUARY 2, 2024

7:00 – 8:00 am

Cask Room

Recovery Meeting

Beginning at 8:00 am

Grand Ballroom A Foyer

Registration

8:00 – 9:00 am

Grand Ballroom A

Breakfast

9:00 – 9:15 am

Grand Ballroom A

Welcome/Announcements

9:15 – 10:30 am

Grand Ballroom A

Lawyers in the Court of Public Opinion

Lawyers may excel in a court of law, but – as recent headlines confirm – we have not fared as well in the Court of Public Opinion. In this discussion, we will explore some self-inflicted wounds and whether we may improve our methods of self-regulation to restore citizens’ confidence in the professionals sworn to serve them.

- *Is attorney discipline an effective means of restoring public confidence?*
- *Are there more effective methods of enhancing the image of our profession?*
- *How does public perception affect our profession’s impact on society?*

Moderator:

[Irwin R. Kramer](#), Managing Partner of Kramer & Connolly

Panelists:

[Nathan M. Crystal](#), Founder and General Counsel to Crystal & Giannoni-Crystal, LLC, and Adjunct Professional Responsibility Professor at NYU

[David H. Safavian](#), Senior Vice-President and General Counsel to The American Conservative Union, and Director of its Nolan Center for Justice

<p>10:30 - 10:45 a.m.</p> <p><i>Grand Ballroom A Foyer</i></p>	<p>Break</p> <p>Sponsored by: </p>
<p>10:45 – 12:00 pm</p> <p><i>Grand Ballroom A</i></p>	<p><i>Lawyer as Therapist: Dealing with Clients in Crisis</i></p> <p><i>Being the subject of a disciplinary investigation is exceedingly stressful for any lawyer. For clients who also struggle with mental health or substance use issues, a discipline investigation can magnify those struggles. This program will discuss the ethical issues we, as lawyers for clients involved in the disciplinary process, must consider when faced with clients in crisis.</i></p> <p><u>Moderator:</u></p> <p>Sari Montgomery, Partner of Robinson, Stewart, Montgomery & Doppke, LLC and APRL Treasurer</p> <p><u>Speakers:</u></p> <p>Dr. Diana Uchiyama, JD, PsyD., Director of IL LAP</p> <p>Cody M. Jerabek, Director of WY LAP</p>
<p>12:00 – 1:00 pm</p> <p><i>Grand Ballroom A</i></p>	<p>Lunch</p>
<p>1:00 – 2:15 pm</p>	<p>Afternoon Break – Free Time</p> <p>Visit Louisville Slugger Museum & Factory (800 W. Main St. ~ approx.16 min. walk from hotel – Tickets = \$22/adult, \$21/senior)</p> <p>Take a 1 hr. Historical Old Louisville Self-Guided Walking Tour by downloading the app - GPSmyCity: Walks in 1k+ Cities from iTunes or Google Play</p>

<p>2:15 – 3:30 pm</p> <p><i>Grand Ballroom A</i></p>	<p><i>“Limited Liability” Doesn’t Mean for Counsel: Ethical Considerations in Representing Organizations</i></p> <p><i>Join our panel of practitioners and law firm general counsel to discuss recurring ethical issues arising in the representation of entities, including client identification, reporting up, confidentiality, communication, conflicts, and everyone’s favorite, serving on a board of directors.</i></p> <p><u>Moderator:</u></p> <p>Noah Fiedler, Shareholder of Barron & Newburger, P.C.</p> <p><u>Panelists:</u></p> <p>Jonathan H. Margolies, General Counsel of Michael Best & Friedrich</p> <p>Deborah A. Winokur, General Counsel of Cozen O’Connor</p>
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<p>3:30 –3:45 pm</p> <p><i>Grand Ballroom A Foyer</i></p>	<p>Break</p> <p>Sponsored by:</p> <p>Rumberger Kirk</p>
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<p>3:45 – 5:00 pm</p> <p><i>Grand Ballroom A</i></p>	<p><i>Bulldog or Bully? Incivility or Zealous Advocacy?</i></p> <p><i>Can a lawyer be a bulldog without being a bully? Some lawyers seem to think that civility is incompatible with zealous advocacy. Is being rude during judicial proceedings more appropriately dealt with by the presiding judge or by bar disciplinary authorities? Or are aspirational statements on professionalism enough? The panel will discuss some recent examples of incivility and how some jurisdictions are trying to deal with the problem.</i></p> <p><u>Moderator:</u></p> <p>Craig Dobson, Dobson Law LCC</p> <p><u>Panelists:</u></p> <p>Presiding Justice Brian S. Currey, CA 2nd District Court of Appeal and Chair of California’s Civility Task Force</p> <p>Deputy Chief Judge Derwin L. Webb, Jefferson County Family Court, Division 10</p> <p>Richard A. Greenberg, Partner of Rumberger Kirk</p> <p>Steve R. Romines, Partner of Romines Weis & Young, PSC</p>
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5:00 – 7:00 pm	<p>Evening Break – Free Time</p> <p>Take a 1 hr. Historical Old Louisville Self-Guided Walking Tour by downloading the app - GPSmyCity: Walks in 1k+ Cities from iTunes or Google Play</p>
7:00 p.m. – 9:00 p.m.	<p>Dinner at River House (3015 River Rd, Louisville, KY 40207)</p> <p><i>All meeting attendees and speakers are welcome. Additional tickets can be purchased online.</i></p> <p><i>Sponsored in part by:</i></p> <p>Frankfurt Kurnit</p>

SATURDAY, FEBRUARY 3, 2024

8:00 – 9:00 am

Grand Ballroom A

Breakfast

9:00 – 10:15 am

Grand Ballroom A

The 21st Century Law Firm: Revisiting Formation, Management, and Strategic Partnerships

This panel will explore both the traditional do's and don'ts of law firm formation as well as a discussion about the digital age's impact on the 21st-century law firm. Technological advances have resulted in both new management tools and additional opportunities for law firms to form strategic partnerships with both international law firms and nonlawyer entities. Of course, ethical issues abound so the topic promises to provide a lively, informative, and interactive discussion.

Moderator:

[Jan L. Jacobowitz](#), Legal Ethics Advisor

Panelists:

[Paul M. Floyd](#), Partner of Wallen-Friedman & Floyd, P.A.

[Lynda C. Shely](#), The Shely Firm, PC

[Douglas R. Richmond](#), Managing Director of AON Risk Solutions

10:15 – 10:30 am

Grand Ballroom A Foyer

Break

Sponsored by:



<p>10:30 – 11:45 am</p> <p><i>Grand Ballroom A</i></p>	<p><i>Ethics Game Show: Wheel of Fortune or Misfortune</i></p> <p><i>A fun, competitive game show with prizes for audience members who correctly answer questions involving recent legal ethics matters and related news, laws, and other relevant topics of interest.</i></p> <p><u>Hostesses:</u></p> <p>Alison P. Buchanan, Shareholder and Chair of Business Litigation at Hoge Fenton, Jones & Appel</p> <p>Allison L. Wood, Legal Ethics Consulting, P.C.</p> <p>Lauren E. Snyder, Partner of HWG LLP</p> <p><u>Prize Sponsors:</u></p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div data-bbox="565 863 776 934">  <p>ROBINSON STEWART MONTGOMERY & DOPPKE LLC</p> </div> <div data-bbox="792 852 1382 1003">  <p>Institute For Well-Being In Law</p> <p>Northwestern University Pritzker School of Law</p> </div> </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 20px;"> <div data-bbox="540 1066 1003 1203">  <p>MINDFULNESS IN LAW SOCIETY</p> </div> <div data-bbox="1032 1129 1365 1230">  <p>FAUGHNAN LAW PLLC</p> </div> </div>
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<p>11:45 – 1:00 pm</p> <p><i>Grand Ballroom A</i></p>	<p><i>Respondent's Roundtable & Lunch</i></p> <p><i>Roundtable moderators will lead a lively discussion about State Bar discipline in the various states and jurisdictions touching on current events; related ethics rules and opinions; disciplinary topics, issues, and trends that were seen in 2023; and possible ethics advice and defenses that could help to manage liability.</i></p> <p><u>Moderators:</u></p> <p>Paige Adamczyk, Cha Law Ethics</p> <p>Eric T. Cooperstein, Law Office of ETC</p>
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1:00 pm	Conference Concludes
2:15 – 5:00 pm	Optional Social Event @ Churchill Downs & Kentucky Derby Museum 704 Central Avenue, Louisville, KY 40208 <i>Tickets are \$32 each and include some friendly competition on the track; a private, historic tour of Churchill Downs, the 360 multi-media viewing experience of the short film, “The Greatest Race”; and a self-guided tour of the Kentucky Derby Museum. Space is limited so please contact Kendra Basner if you would like to attend: kendra@oriellyroche.com</i>

Thank you to our meeting sponsors!

Frankfurt Kurnit Klein & Selz PC

Law Office of Peter L. Ostermiller

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