



2024 APRL ANNUAL MEETING
August 1-3, 2024

InterContinental Chicago Magnificent Mile
505 N. Michigan Ave., Chicago, IL 60611

| THURSDAY, AUGUST 1, 2024 | |
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| 2:00 – 4:00 pm <i>Streeterville, Lobby Level</i> | Board Meeting |
| 5:00 – 5:30 pm <i>Holland & Knight 150 Riverside Plaza</i> | New Members and First-Time Attendees Reception <i>Sponsored by:</i> Holland & Knight |
| 5:30 – 7:30 pm <i>Holland & Knight 150 Riverside Plaza</i> | Welcome Reception & Kettlewell Award Presentation to Ronald C. Minkoff, Partner, Frankfurt Kurnit Klein & Selz PC <i>Sponsored by:</i> Holland & Knight |
| Beginning at 7:30 pm | Dine Arounds <u>View restaurants, hosts and sign up here</u> |

FRIDAY, AUGUST 2, 2024


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| <p>7:00 – 8:00 am <i>Prime 2, 2nd Fl.</i></p> | <p>Recovery Meeting</p> |
| <p>8:00 am <i>Streeterville Foyer</i></p> | <p>Registration</p> <p>Welcome bags provided by : </p> |
| <p>8:00 – 9:00 am <i>Streeterville</i></p> | <p>Breakfast</p> <p>Sponsored by:  ROGERS JOSEPH O'DONNELL</p> |
| <p>9:00 – 9:15 am <i>Avenue Ballroom</i></p> | <p>Welcome Address & Announcements</p> |
| <p>9:15 – 10:30 am <i>Avenue Ballroom</i></p> | <p><i>Analyzing and Applying Conflict & Imputation Rules to Lawyers Wearing Legal & Non-Legal Hats</i></p> <p><i>This panel will explore the rules that apply when a practicing lawyer is acting in whole or in part in a non-lawyer capacity or for a non-legal business, and/or has an ownership interest in a non-legal service provider. In particular, the panel will consider the application of conflict rules and principles of imputation to real-world situations involving the provision of law-related services where the ethics rules and laws are put to the test.</i></p> <p><u>Moderator:</u> <u>Drew Dilworth</u>, Partner, O'Reilly & Roche LLP.</p> <p><u>Panelists:</u></p> <p><u>William Freivogel</u>, Author, <u>Freivogel on Conflicts</u></p> <p><u>Alison Martin Rhodes</u>, Deputy General Counsel, Sheppard Mullin</p> <p><u>Carole J. Buckner</u>, Wilson Elser Moskowitz Edelson & Dicker, LLP</p> |

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| <p>10:30 - 10:45 a.m.</p> <p><i>Avenue Foyer</i></p> | <p>Break</p> <p><i>Sponsored by:</i></p>  |
| <p>10:45 – 12:00 pm</p> <p><i>Avenue Ballroom</i></p> | <p><i>The More We Share The More We Have: APRL's Future of Lawyering Committee's Proposal to Revise Rule 5.4</i></p> <p><i>Regardless of whether you agree with Leonard Nimoy's statement, it is not unusual for lawyers to be willing to share the wealth with nonlawyers as a way to both increase business and access to legal services. The current ABA Model Rule 5.4 restriction on fee sharing is the latest topic that APRL's Future of Lawyering Committee is tackling. This panel will discuss how Model Rule 5.4 restricts innovation and share a proposal for an amended 5.4 that offers a new approach designed to facilitate innovation, increase access to legal services, and maintain the protection of the public.</i></p> <p><u>Moderator:</u></p> <p><u>Jan L. Jacobowitz</u>, Founder and Owner, Legal Ethics Advisor</p> <p><u>Speakers:</u></p> <p><u>Brian Faughnan</u>, Owner, Faughnan Law, PLLC</p> <p><u>Hope Todd</u>, Overseer, District of Columbia Bar Legal Ethics Program</p> |
| <p>12:00 – 1:00 pm</p> <p><i>Streeterville</i></p> | <p>Lunch and Annual Business Meeting</p> <p><i>Sponsored by:</i></p>  |
| <p>1:00 – 1:50 pm</p> <p><i>Avenue Ballroom</i></p> | <p>Optional Speed Networking Event</p> <p><i>Sponsored by:</i></p>  |

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| <p>2:00 – 3:15 pm</p> <p><i>Avenue Ballroom</i></p> | <p><i>Disqualification of Counsel—When the Client’s Right to Counsel is Taken Away</i></p> <p><i>Clients may have the right to choose their counsel, but do they have the right to keep their counsel? What happens when they must go back to the drawing board because of the sins of their chosen advocate? This panel will explore the disqualification of lawyers when there is imputation of conflicts; personal interest conflicts; receipt of confidential, privileged, or stolen information; the appearance of impropriety; and misconduct with witnesses. What are the implications for your legal malpractice insurance?</i></p> <p><u>Moderator:</u></p> <p><u>Kaylin Whittingham</u>, Principal, Whittingham Law</p> <p><u>Panelists:</u></p> <p><u>Matthew R. Henderson</u>, Partner, Hinshaw & Culbertson LLP</p> <p><u>Margaret "Meg" Christensen</u>, General Counsel, Dentons Bingham Greenebaum</p> <p><u>Edward W. Feldman</u>, Partner, Miller Shakman Levin & Feldman</p> <p><u>Rawn Reinhard</u>, Vice-President and Senior Loss Prevention Counsel, Attorney's Liability Assurance Society</p> |
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| <p>3:15 –3:30 pm</p> <p><i>Avenue Foyer</i></p> | <p>Break</p> <p>Sponsored by: </p> |
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| <p>3:30 – 4:45 pm</p> <p><i>Avenue Ballroom</i></p> | <p><i>Calling Perry Mason: Ethical Hurdles During Trial</i></p> <p><i>A panel of experienced trial lawyers will focus on ethical issues that can arise during trial (but hopefully not too often), including ethical witness preparation; witnesses testifying falsely; falsified documents; dealing with a difficult judge; and disagreements between counsel and the (attorney) client. Viewing these and other circumstances within the context of matters brought against attorneys, including disciplinary hearings as well as civil malpractice trials, the panel will offer ethical guidance as well as practical tips for effectively representing your clients at trial.</i></p> <p><u>Moderator:</u></p> <p><u>Merri Baldwin</u>, Shareholder, Rogers Joseph O’Donnell</p> <p><u>Panelists:</u></p> <p><u>Kathryne Hayes</u>, Collins Bargione & Vuckovich</p> <p><u>Joseph P. McMonigle</u>, Partner, Long & Levit</p> <p><u>Ronald C. Minkoff</u>, Partner, Frankfurt Kurnit Klein & Selz PC</p> |
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| <p>4:45 – 5:00 pm</p> <p><i>Avenue Ballroom</i></p> | <p>Day 1 Closing Remarks</p> |
| <p>5:00 pm</p> <p><i>Avenue Ballroom</i></p> | <p>Afternoon Treat</p> <p>Sponsored by:</p> <div style="text-align: right;">  <p>MINDFULNESS IN LAW SOCIETY</p> </div> |
| <p>5:00 – 7:00 pm</p> | <p>Evening Break – Free Time</p> |

6:45 p.m. – 9:00 p.m.
Board at 6:45 p.m.

Chicago's First Lady Dinner Cruise on *Classic Lady*

112 W. Wacker Dr., along Chicago Riverwalk. Use stairs at NE corner of N. Michigan Ave. & E. Wacker Dr.

All meeting attendees and speakers are welcome. Additional tickets can be purchased online.

Sponsored by:

Frankfurt Kurnit

Dinner Cruise Prize Sponsors:

Kendra L. Basner, Esq



SATURDAY, AUGUST 3, 2024

8:00 – 9:00 am

Streeterville

Breakfast

9:00 – 10:15 am

Avenue Ballroom

From Classroom to Courtroom: Addressing the Void Between Legal Education and Professional Practice

This panel discussion aims to explore the disparities between the knowledge law students acquire in their academic journey and the practical skills and insights necessary for success in the legal profession, with a focus on how the Rules of Professional Conduct present themselves in the daily practice of law. Aspiring lawyers invest significant time and effort into mastering legal theory and learning the ethical rules, but how does that translate into real-world legal experience and how can we construct a better bridge between the two to avoid malpractice actions and bar complaints? This panel will identify key areas where law students often fall short and discuss strategies for closing these gaps between the law school and law firm setting.

Moderator:

Professor Wendy Muchman, Professor of Law, Northwestern University Pritzker School of Law

Panelists:

Malvika A. Sinha, Coppersmith Brockelman


Justin Sia, Board Member, Local School Council of Inter-American Magnet School

Professor Jon J. Lee, Associate Professor of Law, University of Oklahoma College of Law

10:15 – 10:30 am

Avenue Foyer

Break

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| <p>10:30 – 11:30 am</p> <p>Avenue Ballroom</p> | <p><i>The Great Debate: A live debate about recent Listserv topics of contention</i></p> <p><i>Join our panel of experts as they move from their armchairs to the center stage to debate and discuss current and controversial topics in legal ethics from APRL’s listserv. The panelists will learn live on stage which side of a topic they should be prepared to advocate, and will vie for the title of the “Great APRL Debater.” The topics will include but are not limited to a discussion regarding conflicts of interests, disqualification, and the discipline of attorneys who represented the former President of the United States.</i></p> <p><u>Moderator:</u></p> <p><u>Emil Ali</u> , partner at McCabe Ali LLP</p> <p><u>Debaters:</u></p> <p><u>Stacie H. Rosenzweig</u>, shareholder of Halling & Cayo</p> <p><u>Ryan Little</u>, founder of Little Legal</p> <p><u>David Carr</u>, private practice ethics lawyer in Las Cruces, New Mexico</p> <p><u>Elizabeth T Simon</u>, Assistant General Counsel for Ethics, Akin Gump Strauss Hauer & Feld LLP</p> |
| <p>11:30 – 12:30 pm</p> <p>Avenue Ballroom</p> | <p><i>Respondent’s Roundtable & Lunch</i></p> <p><i>How Would You Defend This?</i> <i>Cassidy Chivers and Courtney Miller will moderate this meeting’s roundtable discussion about strategies for defending respondents against certain disciplinary allegations. They’ll provide hypotheticals before the panel to facilitate a productive conversation. Come with your discipline defense hats on and ready to discuss.</i></p> <p><u>Moderators:</u></p> <p><u>Cassidy Chivers</u>, shareholder at Barron & Newburger, P.C.</p> <p><u>Courtney Miller</u>, partner at HWG,</p> <p>LLP Lunch sponsored by</p>  |
| <p>12:30 pm</p> | <p>Conference Concludes</p> |

1:20 pm – Game Time

Wrigley Field

**Optional Social Event @ Wrigley Field (1060 W. Addison St.)
Chicago Cubs vs. St. Louis Cardinals**

Space is limited. Contact Trisha Rich for tickets: trisha.rich@hklaw.com

Thank you to our meeting sponsors!

Holland & Knight

Frankfurt Kurnit Klein & Selz PC

Pansky Markle

O'Rielly & Roche LLP

Rogers Joseph O'Donnell

Robinson Stewart Montgomery & Doppke, LLC

Legal Ethics Consulting

Dentons

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Mindfulness in Law Society

Halling & Cayo S.C.

Kendra L. Basner, Esq.