

## **ALPS July 23<sup>rd</sup> CLE Agenda**

**9:00 – 9:05** – Welcome, Opening Remarks, Intro (Bar)

**9:05 – 10:20** - “**How to Keep It Clean with the Green: Trust Accounting Do’s and Don’ts**” (Bassingthwaighte)

### **Program Summary:**

Trust account problems remain one of the top reasons attorneys are disciplined in the US. Certainly, there have been and will continue to be attorneys whose trust accounting activities are egregious and in some situations criminal. However, this does not account for all the problems. Far too often, an attorney was less than diligent about maintaining proper and appropriate financial practices in the office and things simply got out of hand. This program will start with a discussion of trust accounting basics, address common missteps lawyers make, and share best practices to help attorneys stay on the right path.

### **A Sampling of Attendee Takeaways:**

- An explanation of the basics of setting up and maintaining a client trust account
- An awareness of the importance of attorney oversight of client property coupled with the details of how to accomplish this
- An understanding of the common missteps that others make.
- How a misunderstanding of banking terms and practices can lead to problems.
- Knowledge of how to avoid becoming a victim of wire fraud.

**10:20 – 10:35 Break**

**10:35 – 11:50** “**Productive Attorney/Client Relationships: A Master Class**”  
(Bassingthwaighte)

### **Program Summary:**

Are you an attorney looking to improve your client communication skills and find happiness in your legal practice? If so, this presentation is tailored just for you! You’ll gain vital skills to build strong attorney-client relationships, learn how to master the art of clear and concise communication, and discover strategies to identify and choose the right clients while also setting boundaries that work best for you.

### **A Sampling of Attendee Takeaways:**

- An awareness of why setting the right impression at the outset of representation is so important.
- Practical tips on how to constructively manage the attorney-client relationship.
- Insight on the value of looking for the learning from problem clients.
- An understanding of steps that can be taken to communicate with clients more effectively.