

Thursday, April 2, 2020

THURSDAY TRACK 1 – SOFTWARE (3 Sessions)

1:00 – 2:00 p.m.

Formatting Briefs & Microsoft Word Master Class - Power Tips for Lawyers & Law Firm Staff - 1 hour of Dual CLE Credit

Barron Henley, Affinity Consulting, Columbus OH

One of the most difficult tasks one can undertake is formatting a brief in Microsoft Word that has a title page, table of contents, table of authorities, multi-level paragraph numbering, and page numbering that starts over in the middle of the document and switches formats. It takes 8 hours to learn how to build such a document from scratch, but only an hour to learn how to use a pre-built, customizable template. In this seminar, you'll be able to download our template and follow along on your own computer as we demonstrate how to use the built-in formatting tools. We'll also show you how to easily customize it for any font, point size or paragraph alignment you may want. The heavy lifting is already done, and if you use this template as the starting point for your next brief, you'll save yourself many hours and much frustration.



Barron Henley - bhenley@affinityconsulting.com

Barron is one of the founding partners of Affinity Consulting Group, a legal technology consulting firm focused on automating and streamlining law firms and legal departments. He earned his B.S./B.A. (marketing and economics) and J.D. from The Ohio State University and is a member of the American, Ohio and Columbus Bar Associations, and the Worthington Estate Planning Council. He is a member of both the ABA Law Practice Management and the Real Property Trust and Estate Law ("RPTE") Sections. He's a member of RPTE Futures Task Force, a Board Member for the ABA TECHSHOW, and is the former Chair of the Ohio State Bar Association Law Office Automation & Technology Committee. Mr. Henley heads Affinity's document assembly/automation and software training departments; he is a renowned expert on Microsoft Word, Adobe Acrobat and HotDocs document assembly software; and has authored legal-specific manuals on HotDocs, Adobe Acrobat, and Microsoft Word, Excel & Outlook. Barron is also an expert in launching new law firms, overhauling existing firms, and documenting and re-engineering law firm processes. Finally, Barron teaches continuing legal education (CLE) classes throughout the U.S. and Canada covering a wide variety of topics related to law practice management, technology and ethics.

2:15 – 3:15 p.m.

Improve Your Outlook: Default Settings in Office every law firm should know - 1 hour of Dual CLE Credit

Barron Henley, Affinity Consulting, Columbus OH

Lawyers and staff are generally drowning in email and many feel helpless when trying to get it under control. This seminar will show you how to use all of Microsoft Outlook's feature set to efficiently store, organize email (and attachments), and successfully deal with high email volume. We'll also show you how to fix Outlook's default settings for email, calendar, contacts and tasks. Finally, we'll explain many amazing and useful Outlook features which most users don't even know are there.



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Trust and Estate Law ("RPTE") Sections. He's a member of RPTE Futures Task Force, a Board Member for the ABA TECHSHOW, and is the former Chair of the Ohio State Bar Association Law Office Automation & Technology Committee. Mr. Henley heads Affinity's document assembly/automation and software training departments; he is a renowned expert on Microsoft Word, Adobe Acrobat and HotDocs document assembly software; and has authored legal-specific manuals on HotDocs, Adobe Acrobat, and Microsoft Word, Excel & Outlook. Barron is also an expert in launching new law firms, overhauling existing firms, and documenting and re-engineering law firm processes. Finally, Barron teaches continuing legal education (CLE) classes throughout the U.S. and Canada covering a wide variety of topics related to law practice management, technology and ethics.

3:30 – 4:30 p.m.

Become an Excel Wizard - Practice tips for Legal Professionals - 1 hour of Dual CLE Credit

Barron Henley, Affinity Consulting, Columbus OH

If you have Microsoft Office, then you have Excel. However, if you are like most lawyers, you're either underutilizing Excel or not using it at all. In this seminar, we'll show you exactly how you can start using it in your practice to improve your work product and make your life easier. Produce flawless fiduciary accountings, amortization schedules, real estate closing statements, disbursement schedules, medical bill summaries, and graphical representations of data (pie charts, bar graphs, etc.). You'll also learn how to use Excel as a list manager and data source for mail merge functions (quickly creating hundreds of letters or labels in Word from a list of names and addresses in Excel).



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Barron is one of the founding partners of Affinity Consulting Group, a legal technology consulting firm focused on automating and streamlining law firms and legal departments. He earned his B.S./B.A. (marketing and economics) and J.D. from The Ohio State University and is a member of the American, Ohio and Columbus Bar Associations, and the Worthington Estate Planning Council. He is a member of both the ABA Law Practice Management and the Real Property Trust and Estate Law ("RPTE") Sections. He's a member of RPTE Futures Task Force, a Board Member for the ABA TECHSHOW, and is the former Chair of the Ohio State Bar Association Law Office Automation & Technology Committee. Mr. Henley heads Affinity's document assembly/automation and software training departments; he is a renowned expert on Microsoft Word, Adobe Acrobat and HotDocs document assembly software; and has authored legal-specific manuals on HotDocs, Adobe Acrobat, and Microsoft Word, Excel & Outlook. Barron is also an expert in launching new law firms, overhauling existing firms, and documenting and re-engineering law firm processes. Finally, Barron teaches continuing legal education (CLE) classes throughout the U.S. and Canada covering a wide variety of topics related to law practice management, technology and ethics.

THURSDAY TRACK 2 - PRIVACY (3 Sessions)

1:00 – 2:00 p.m.

Understanding Familial DNA 1 hour of General CLE Credit

Katherine L. Cross - DNA Technical Leader Guardian Forensic Sciences (Philadelphia PA)

DNA technology has impacted the legal community in a substantial way the past twenty years, given it is a powerful scientific tool to determine identity in toxic tort cases, criminal investigations, paternity in family law matters, and can become an issue in estate litigation, just to name a few examples. As genetic genealogy websites become more popular and individuals continue to voluntarily submit their DNA or enter their genetic profiles onto publicly available genetic genealogy sites, the more biological information there is to compare with DNA samples from civil and criminal cases. Unlike traditional DNA analysis, statistical modeling is used with genetic genealogy, and there are privacy concerns with accessing DNA profiles on genealogy websites. Katherine Cross, an experienced DNA analyst with Guardian Forensic Sciences, will explain genetic genealogy and its practical impact.

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Katherine L. Cross – klcrosss@gmail.com

Ms. Cross's career began as a serology intern at the Charlotte-Mecklenburg Police crime lab while she was earning her Bachelor of Science from the University of North Carolina at Charlotte (with concentrations in genetics and psychology). After graduating, she joined the North Carolina State Bureau of Investigation as an agent assigned to the Serology/DNA Unit. It was here that her forensic DNA experience began when she assisted in establishing the PCR based DNA testing for this laboratory. With this experience, Ms. Cross was then able to establish the initial PCR DNA testing programs at the Acadiana Criminalistics Laboratory, NMS Labs, and finally at Guardian Forensic Sciences. She earned her Master of Pharmacy with a concentration in Forensic Serology and DNA in 2005 from the University of Florida. Her approach to casework is tenacity with the occasional stroke of genius and thinking outside the box. Ms. Cross believes that good communication is the key to success in solving cases.

2:15 – 3:15 p.m.

Consumer Privacy and GDPR - What do you need to know? 1 hour of General CLE Credit

Eric Chad, Merchant & Gould, Minneapolis, MN

The laws and regulations relating to the collection, use, processing, and storage of consumer data and consumer privacy are constantly evolving. Our speaker will discuss two of the more significant developments in this area from the last few years: The EU's General Data Privacy Regulation (GDPR)



Eric R. Chad – echad@merchantgould.com

As an attorney who practices in all areas of intellectual property litigation, as well as data privacy and security, Eric Chad a partner at Merchant & Gould, prides himself on keeping thieves, trolls, hackers, and the government off his clients' backs. On the data privacy and security side, Eric counsels clients on a multitude of issues, such as navigating compliance with complex legal and regulatory frameworks like the EU's General Data Protection Regulation and the California Consumer Privacy Act. This includes working with clients to ensure that attempts at compliance are necessary and that issues are appropriately prioritized to promote efficiencies. Eric also helps his clients by drafting, or aiding in the drafting of, internal and public-facing policy documents, such as privacy notices and website terms of use. Eric has also spent the last decade litigating complex intellectual property disputes, including cases involving patents, trademarks, copyrights, trade secrets, publicity rights, and unfair competition.

3:30 – 4:30 p.m.

Personal Data You and Your Clients Voluntarily Give Up - 1 hour of Dual CLE Credit

Michael Maschke, Sensei Enterprises, Inc., Fairfax VA

As the world becomes more connected with the implementation of 5G and the prevalence of the Internet of Things (IoT), prepare to be surprised at what apps on your phone, computer system, internet browser, and companies know and store about you. What information are you giving away and how can you stop it? Plus, how can you find information about your clients, opposing counsel's clients and yourself?

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Michael C. Maschke - mmaschke@senseient.com

Michael Maschke is the Chief Executive Officer at Sensei Enterprises, Inc. Mr. Maschke holds a degree in Telecommunications from James Madison University. Mr. Maschke is an EnCase Certified Examiner (EnCE), a Certified Computer Examiner (CCE #744), a Certified Ethical Hacker (CEH) and an AccessData Certified Examiner (ACE). Mr. Maschke is also a Certified Information Systems Security Professional (CISSP). Mr. Maschke has significant experience with network troubleshooting, design and implementation, security, systems integration and computer engineering. He is also a member of the International Society of Forensic Computer Examiners (ISFCE). Prior to his current role, he oversaw Sensei's digital forensics and information technology departments, which provided support to over 200 area law firms, legal entities and corporations. Mr. Maschke is a Microsoft Certified Systems Engineer, Microsoft Certified Systems Administrator and a Microsoft Certified Professional. He is an associate member of the American Bar Association and has spoken at the American Bar Association's TECHSHOW conference on the subject of cybersecurity. He is currently an active member of the ABA's Law Practice Division: Technology Core Group and is on the Fairfax Law Foundation Board of Directors. He is also a co-author of Information Security for Lawyers and Law Firms, a book published by the ABA in 2006 and The 2008-2019 Solo and Small Firm Legal Technology Guides (American Bar Association, 2008 – 2019).

THURSDAY TRACK 3 – SMALL FIRM (3 Sessions)

1:00 – 2:00 p.m.

Math Allergies: Take the Pain out of Accounting, Time Tracking and Billing - 1 hour of Dual CLE Credit

Natalie Kelly, Director of the State Bar of Georgia's Law Practice Management Program, Atlanta GA

Accounting can be difficult for lawyers, and as business owners, many struggle with the required tracking and other numbers-based tasks needed in modern law practice. This program will help attendees ease any pain they may be experiencing with tracking time, getting bills out, collecting fees and accounting for money coming in and going out of their law offices. A review of best of breed financial management systems and policies and procedures will be explored to help attendees craft or update their own processes.



Natalie Kelly – nataliek@gabar.org

Natalie Robinson Kelly is the Director of the State Bar of Georgia's Law Practice Management Program. She received her Bachelor of Arts degree in English with a minor in Political Science from Spelman College and her Juris Doctorate from Atlanta's John Marshall Law School. Prior to attending law school, she taught Law Office Management as an Adjunct Professor at Atlanta's John Marshall Law School; and she held positions in education, commercial real estate, hospitality, and small law firm practice. In 2005, she was selected State Bar of Georgia Employee of the Year. At the State Bar serving as Georgia's PMA (Practice Management Advisor), she has conducted over 1,200 on-site management and technology consulting engagements with law firms and legal departments. She also now co-teaches Law Practice Technology as an Adjunct Professor at Georgia State University College of Law. Natalie is a Certified Consultant for multiple legal software applications, and has served on many legal technology advisory boards. She was named to the American Bar Association's inaugural list of Women in Legal Tech; and in 2014, she chaired the ABA TECHSHOW Planning Board. She was selected as a Fastcase 50 honoree for being one of the law's smartest, most courageous innovators, techies, visionaries, and leaders; and is a fellow in the College of Law Practice Management. Natalie speaks frequently and has presented in 15 states, Puerto Rico and the U.S. Virgin Islands. Natalie is active in the Law Practice Division of the American Bar Association including having served on the Division's Council. In 2016, Natalie won the Division's highest publication honor, the Robert P. Wilkins Award for best feature article in the Division's magazine, Law Practice. She is currently a member of the Division's Professional Development Board. She also writes a regular column in the Georgia Bar Journal; and is the co-author of the blog, Georgia Practice Advisor, offering office management, ethics and technology tips and advice to legal professionals in Georgia.

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2:15 – 3:15 p.m.

Proven Tips to Improve Client Communications - 1 hour of Dual CLE Credit

Sean J. Martin, Martin Heller Potempa & Sheppard, PLLC, Nashville TN

In this session, you will learn how to better understand client needs and expectations as we review ethics rules and best practices for establishing, maintaining and terminating attorney-client relationships. You'll learn how to employ proven technology to more effectively communicate with your clients, including how to respond timely and securely and how to keep track of all your communications automatically.



Sean J. Martin - smartin@mhpplaw.com

Sean J. Martin is a partner at Martin Heller Potempa & Sheppard, PLLC in Nashville. His practice is divided evenly between family law and personal injury. He is also the co-founder of Time Miner, a retroactive billing platform for lawyers who bill by the hour. Sean is an advocate of #legaltech. He enjoys sharing his knowledge and enthusiasm with others, and is grateful to the bar associations across the country who provide him the opportunity to do so.

3:30 – 4:30 p.m.

Care & Feeding of Social Media: Enhancing Your Online Presence Ethically - 1 hour of Dual CLE Credit

Erin Gerstenzang, EHG Law Firm, Atlanta GA

Use social media with purpose and authenticity to build a strong referral network. In this talk we will examine fun and engaging examples of attorneys who are excelling at social media marketing alongside more problematic approaches. We will cover why you should be using social media, how you can do it effectively and ethically, and what you should be doing on social to bring in more clients.



Erin Gerstenzang – erin@ehglawfirm.com

Erin Gerstenzang founded EHG Law Firm, which is located in Atlanta, Georgia. She provides client-centered legal services to clients facing drug and alcohol-related criminal offenses, and subscription legal services to new hemp businesses in Georgia. Early on in her career as a trial attorney, Erin discovered a passion for helping other professionals improve their craft, and she built a national reputation as a sought-after speaker on a variety of technology and practice topics, including legal ethics, design-thinking for law firms, automation, paperless systems, social media, and mentorship. Combining both her trial skills and talent for speaking, she excels at reducing the complicated and difficult down to the simple and actionable. Erin also runs the EHG Law Firm Collective, where she leads a collaborative female mentorship-based group focused on developing legal and business skills to accelerate solo law firm success. She was honored by Fastcase 50 in 2018 and recognized by the ABA's Legal Technology Resource Center as one of the honorees of the Women in Legal Tech 2019. She is on the ABA TECHSHOW Planning Board and she co-organizes the Atlanta Legal Tech Group. She serves on the board of directors of the Georgia Association for Women Lawyers, and she was a recipient of their GAWL Visionary Award in 2019. She chairs the Judicial Recommendation Committee of the Georgia Association of Criminal Defense Attorneys and is on their long-range planning committee.

Friday, April 3, 2020

FRIDAY OPENING SESSION – Room 406

9:00 -10:00 a.m.

The Bill & Phil Show: It's 2020, So Where Is My Flying Car? 1 hour of Dual CLE Credit

Bill Ramsey, Neal & Harwell (Nashville), and **Phillip Hampton**, LOGICFORCE (Nashville)

Bill and Phil look at the state of technology heading into the decade of the 20's. So much has been promised with the booming technological revolution. Many promises have been kept; but others have proven to be elusive. The presenters showcase the latest technology trends for law firms that have proven to be revolutionary and practical. They examine the role of the Cloud and mobility in the ongoing transformation of the legal tech space; and how the utility of the Cloud has evolved over the past decade. Also, Bill and Phil will unveil some of the latest gadgets and innovations that every legal professional will want.



Phillip Hampton - PHampton@logicforce.com

Phil is the founder and CEO of LogicForce Consulting, LLC. He has over 20 years of experience in the field of information technology and since 1995 has consulted with numerous law firms and government agencies in the areas of practice management systems, technical litigation support, computer forensics, electronic data discovery, and trial presentation technologies. Mr. Hampton is a computer forensic specialist who has provided forensic services for attorneys on a wide variety of cases. Mr. Hampton received his B.S. degree in computer science from Lambuth College and his M.S. degree in computer science from Vanderbilt University.



William T. Ramsey - wtr@nealharwell.com

Bill grew up on a farm in Viola, Tennessee. He attended the Georgia Institute of Technology where he graduated in 1973 with high honors in Mechanical Engineering. He received his law degree in 1981 from the University of Tennessee where he was a member of the Order of the Coif and the University of Tennessee Law Review. He was awarded the Michie Law Publishing Award for graduating first in his law school class. After graduating, Mr. Ramsey served as a law clerk for the Honorable Harry Phillips of the United States Court of Appeals for the Sixth Circuit. After his clerkship, he joined Neal & Harwell. He has represented a wide variety of defendants in federal white collar prosecutions and investigations, including high profile bank, healthcare (Medicare and Medicaid), securities, tax, and mail and wire fraud cases. He has extensive civil jury trial experience in a wide variety of cases, including personal injury, business torts, computer and technology litigation and complex commercial transactions.

FRIDAY TRACK 1 - LITIGATION (4 Sessions)

10:15 – 11:15 a.m.

E-Discovery - Collection & Preserving Evidence from Mobile Devices - 1 hour of Dual CLE Credit

Michael Maschke, Sensei Enterprises, Inc., Fairfax VA

Learn the ins-and-outs of collecting, analyzing and recovering evidence from mobile devices, and listen to real-world stories and examples from the trenches. We will discuss best practices for the preservation of information from mobile devices, including what artifacts can be recovered from devices that may be beneficial to your case. Digital forensic capabilities have grown over time and now we are able to recover more data than ever before that may be vital to your case. Come learn about the some of the new types of information that forensics can uncover, along with updates on capabilities to recover communications and other important user generated data.

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Michael C. Maschke - mmaschke@senseient.com

Michael Maschke is the Chief Executive Officer at Sensei Enterprises, Inc. Mr. Maschke holds a degree in Telecommunications from James Madison University. Mr. Maschke is an EnCase Certified Examiner (EnCE), a Certified Computer Examiner (CCE #744), a Certified Ethical Hacker (CEH) and an AccessData Certified Examiner (ACE). Mr. Maschke is also a Certified Information Systems Security Professional (CISSP). Mr. Maschke has significant experience with network troubleshooting, design and implementation, security, systems integration and computer engineering. He is also a member of the International Society of Forensic Computer Examiners (ISFCE). Prior to his current role, he oversaw Sensei's digital forensics and information technology departments, which provided support to over 200 area law firms, legal entities and corporations. Mr. Maschke is a Microsoft Certified Systems Engineer, Microsoft Certified Systems Administrator and a Microsoft Certified Professional. He is an associate member of the American Bar Association and has spoken at the American Bar Association's TECHSHOW conference on the subject of cybersecurity. He is currently an active member of the ABA's Law Practice Division: Technology Core Group and is on the Fairfax Law Foundation Board of Directors. He is also a co-author of Information Security for Lawyers and Law Firms, a book published by the ABA in 2006 and The 2008-2019 Solo and Small Firm Legal Technology Guides (American Bar Association, 2008 – 2019).

11:30 a.m. – 12:30 p.m.

Advanced Written Persuasive Advocacy - Integrating theme and theory into your written advocacy - 1 hour of General CLE Credit

Lucy Jewel, University of Tennessee College of Law

This course will cover effective written advocacy in trial and appellate courts. Organized from Aristotle's three-part framework of logos (rule-based reasoning), pathos (the emotional resonance of the case), and ethos (credibility of the writer), this talk will include lessons on classical rhetoric as well as modern storytelling techniques.



Lucy Jewel – ljewel@utk.edu

Professor Lucy Jewel is the Director of Legal Writing at the University of Tennessee College of Law Jewel, where she teaches Legal Writing, Entertainment Law, and Torts. She has also directed the law school's Appellate Litigation Clinic, serving as lead-counsel on Sixth Circuit and administrative law appeals. She came to teach at UT from Atlanta's John Marshall Law School, where, in addition to teaching Entertainment Law, she taught legal writing and legal skills courses and also served as Director of Legal Writing. Her teaching is informed by several years of practice experience as a commercial litigator with the New York City firm of Wachtel & Missry, LLP. Professor Jewel's scholarship focuses on the intersections between culture, law, technology, and rhetoric. Her articles have appeared journals such as the Wake Forest Law Review, Maryland Law Review, the Columbia Journal of Gender and the Law, the Yale Journal of Law & Technology, the University of Southern California Interdisciplinary Law Journal, Buffalo Law Review, and the Minnesota Journal of Law, Science, and Technology. Professor Jewel frequently presents at national and international academic conferences. Most recently, she has spoken at the American Association of Law Schools Conference, the Law & Society Conference, the International Legal Ethics Conference at City University Law School, London U.K., and the Legal Writing Institute's Biennial Conference. She is a member of the Legal Writing Institute and the Association of Legal Writing Directors. She has served as a member of the Executive Committee for the AALS Section on Legal Writing, an elected board member of the Association of Legal Writing Directors. She is a founding board member and President of ClassCrits, an organization of legal scholars dedicated to uncovering the connections between law and inequality. Professor Jewel is admitted to bars of New York (inactive), Georgia (inactive), and Tennessee. She is admitted to practice in the Southern District of New York, Eastern District of New York, Eastern District of Tennessee, Sixth Circuit Court of Appeals, and the United States Supreme Court.

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2:00 – 3:00 p.m.

Construction Litigation - Point/Counter-Point - 1 hour of General CLE Credit

W. Michael Baisley, Long Ragsdale & Waters, P.C.

J. Ford Little, Woolf, McClane, Bright, Allen & Carpenter, PLLC

Robert P. Noell, Woolf, McClane, Bright, Allen & Carpenter, PLLC

W. Paul Whitt, Lewis Thomason

With the strong economy in Tennessee there has been a significant increase in construction projects. But, with more construction come more construction related disputes. These disputes range from early detection of issues (such as delays and/or defective construction) to full blown litigation following the completion of the project. In this session, panelists representing 4 separate viewpoints (Owner, Designer, Contractor and Subcontractor) will discuss practical ways to address construction disputes in an effective manner, with an eye toward avoiding costly litigation battles.



W. Michael Baisley – mbaisley@lrwlaw.com

Mike Baisley, of Long Ragsdale & Waters, P.C., focuses his practice in the areas of mergers and acquisitions, corporate law, LLCs and partnerships, real estate transactions, private securities offerings, and a variety of other business transactions. He also has extensive experience in complex business litigation and arbitration. Mike enjoys working with business clients on an ongoing basis, where he essentially functions as “outside” general counsel and advises clients on a variety of business and transactional issues.



J. Ford Little – flittle@wmbac.com

J. Ford Little is a member of is a member of Woolf, McClane, Bright, Allen & Carpenter, PLLC firm where his primary areas of practice include construction law, commercial litigation, and product liability/toxic tort. Mr. Little assists clients in the construction industry, including owners, general contractors, subcontractors, and sureties at every stage of the construction project, including the initiation of the project, the preparation of contract documents, bid preparation, bid mistakes, bid protests, change order negotiations, preparation of project correspondence, disputes concerning defective work and delays, claim preparation, terminations, lien claims, and final dispute resolution through negotiation, mediation, arbitration or trial. Mr. Little, a native of Knoxville, Tennessee, graduated from The University of Tennessee in 1986, with high honors, with a B.S. in accounting and obtained his J.D. from Vanderbilt University in 1989. He is a member of the Knoxville Bar Association and the Tennessee Bar Association. Mr. Little has been a speaker at numerous legal and construction industry seminars on topics such as construction law, litigation, and workers’ compensation. He is a co-editor for the Tennessee section of the Product Liability Desk Reference.



Robert P. Noell – rnoell@wmbac.com

Robert P. Noell has extensive experience in representing owners/developers, general contractors, subcontractors and specialty contractors in the drafting, review, and negotiation of contracts, and the preparation and resolution of contract and lien claims. His clients are engaged in commercial, industrial, institutional, and high-end residential projects. Mr. Noell has an AV Rating by Martindale-Hubbell and is listed in *The Best Lawyers in America*® in construction law. He has

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repeatedly been selected as a “Top Attorney” in Knoxville in construction law by *Cityview* Magazine. He served as an Adjunct Professor in The University of Tennessee Construction Science Program, where he taught construction law. He is a member of the American Arbitration Association panel of construction arbitrators and is listed as a Rule 31 civil mediator by the Tennessee Supreme Court Alternative Dispute Resolution Commission.



W. Paul Whitt - pwhitt@lewisthomason.com

Paul Whitt, a shareholder at Lewis Thomason’s Knoxville office, practices in the areas of construction law and litigation, including professional liability defense of design professionals, such as engineers, architects and surveyors, as well as professional liability representation of accountants and lawyers. Mr. Whitt also has significant experience representing insurance carriers in first party actions brought by insureds related to coverage matters, claims of bad faith, insurance fraud and other extra-contractual matters, as well as experience in general civil litigation.

3:30 – 4:30 p.m.

Courtroom Presentation Technology - 1 hour of Dual CLE Credit

Kat Bike, The Trial & Litigation Company

It is crucial that attorneys, especially in complex cases, present their client’s story in a way that is easy for the judge and jury to follow and understand. It is also important to present evidence smoothly and seamlessly so that miscues do not distract the message. Trial presentation technology and services helps you to control your trial and deliver a far more polished case. Learn about exhibit organization, do’s and don’ts when presenting evidence to a jury, trial presentation software (How it is useful; How to make it useful; Mistakes to avoid; Power Point vs. Trial Director), and When to consider using Litigation Services.



Katherine E. Bike kat@tlcpro.net

Katherine is a Litigation Technology Specialist at The Trial & Litigation Company, where she implements digital resources for trial presentations, including digital communications, audio-visual evidence, and trial focus groups. She has worked directly with litigators and divorce attorneys across the region. She helps attorneys and law firms to streamline the digital information process throughout cases to obtain desirable verdicts for each client. Katherine consults with the trial team, court and courthouse staff, court reporters, equipment vendors and opposing counsel to develop plans for equipping a courtroom for a “paperless trial.” She has a background in technology and has also worked for The University of Tennessee and various nonprofits. Katherine is also a mountain biker and knitter from Knoxville, TN

FRIDAY TRACK 2 - TRANSACTIONAL (4 Sessions)

10:15 – 11:15 a.m.

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Transactional Closings in the Digital Age - 1 hour of Dual CLE Credit

Sam Beutler, SimplyAgree, Nashville TN

Transactional law has always been subject to logistical and organizational challenges, but a plethora of emerging technologies gives attorneys new ways to address these challenges for complex deal work. Attend this session to learn how you can utilize workflows and technology to streamline transactional closings and meet client demands designed for the digital age.



Sam Beutler – sam@simplyagree.com

Sam Beutler is Cofounder and Chief Operating Officer of SimplyAgree, a signature and closing management platform for transactional attorneys. At SimplyAgree, he works closely with law firms and legal professionals to build software-enabled workflows for complex M&A, venture capital, commercial finance and commercial real estate transactions. Prior to helping start SimplyAgree in 2016, Mr. Beutler practiced as a corporate attorney for the law firm of Bass, Berry & Sim, focusing on private M&A and venture capital transactions. Mr. Beutler is a graduate of Vanderbilt Law School and obtained his Bachelor of Arts from Yale University.

11:30 a.m. – 12:30 p.m.

How to Protect Yourself and Preserve Confidentiality when Negotiating (includes Electronic Document Exchange - when to use Word, PDFs, track changes, etc.) - 1 hour of Dual CLE Credit

Barron Henley, Affinity Consulting, Columbus OH

Opposing lawyers routinely email versions of a document back and forth during the negotiation process; and many instruments are never reduced to paper until they're ready to sign. This approach is unquestionably fast and convenient compared to mailing or faxing paper documents. However, electronic document exchange presents many issues that practitioners need to be aware of and risks to protect against. In this seminar, you'll learn when it's appropriate to use word processor files and when it's appropriate to use PDFs. We'll cover how to track your changes in a document and how to ascertain what changes were made by others (even if there are attempts to conceal those changes). You'll also learn how to add comments and annotations to Word or PDF files, how to lock documents down to prevent further changes, and how to avoid including hidden (and potentially damaging) information in the files you're working with (this hidden information is known as metadata). Finally, using plain email arguably affords you no reasonable expectation of privacy. We'll also discuss your email encryption options which ensure that only the intended recipient can open your emails and/or attachments thereto.



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overhauling existing firms, and documenting and re-engineering law firm processes. Finally, Barron teaches continuing legal education (CLE) classes throughout the U.S. and Canada covering a wide variety of topics related to law practice management, technology and ethics.

2:00 – 3:00 p.m.

Just Between Us: Drafting Effective Confidentiality and Nondisclosure Agreements - 1 hour of General CLE Credit

Meghan Morgan, Associate General Counsel, Pilot Flying J (Moderator)

Cynthia L. Gibson, General Counsel, Bush Brothers & Co.

Marcia A. Kilby, Chief Legal Officer, DeRoyal Industries, Inc.

Teah Kirk, Clayton Homes

Many business transactions, employment agreements, and litigation settlement agreements rest on the bedrock of the parties agreeing to keep confidential the terms of the underlying agreement. These agreements, sometimes considered extended exercises in boilerplate, are more properly a complex array of terms defining what's confidential, what's not, what constitutes a breach, and how long confidentiality must be maintained. This panel of in-house counsel will offer a practical guide to drafting confidentiality and nondisclosure agreements in a range of settings to enhance effectiveness and enforceability.



Meghan Morgan - meghan.morgan@pilottravelcenters.com

Meghan Morgan currently serves as Director- Associate General Counsel Technology and Privacy for the Pilot Company. At Pilot Meghan is responsible for legal oversight of its technology, merchandising and newly created privacy departments. Prior to joining Pilot, Meghan spent twelve years as a litigator most recently at Baker Donelson Bearman Caldwell and Berkowitz PC and prior, at Woolf McClane Bright Allen and Carpenter. Meghan is a graduate of Leadership Knoxville (2019), and was named to Knoxville's 40 under 40 list (2013). Meghan is very involved in the Knoxville community, having served on several local non-profit boards, serving on the University of Tennessee's Alumni Board of Directors and as President of the local alumni chapter and was a founding member of Knoxville's YPK. Meghan earned her Juris Doctor degree from Washington and Lee University School of Law. She had a bachelor's degree from The University of Tennessee at Knoxville.



Cynthia L. Gibson - cgibson@bushbros.com

Cynthia Gibson is an accomplished senior executive and experienced board member and she currently serves as General Counsel for Bush Brothers & Co. She has managed multiple global functions, including legal affairs, government affairs, business affairs, internal audit and external relations. She has also served on the boards of public, private and non-profit boards of directors in a variety of industries and areas of interest. Her board experience includes chairing and advising the compensation committee, advising the nominating and governance committee on governance and shareholder activist issues and reporting to the audit committee on compliance, ethics, internal audit and cybersecurity matters. She previously served as executive vice president and chief legal & business affairs officer for Scripps Networks Interactive, a Fortune 1000 company traded on the NASDAQ stock exchange. While in private practice, she was recognized as among "The Best Lawyers in America" and named one of the Top 50 Women Attorneys in Ohio and the Top 25 Women Attorneys

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in Cincinnati. Gibson earned her Juris Doctor degree from the University of Virginia, School of Law. She has a bachelor's degree in history from Wake Forest University.



Marcia A. Kilby – mkilby@deroyal.com

Ms. Kilby is currently the Corporate Secretary and Chief Legal Officer for the DeRoyal group of companies. She is a *cum laude* graduate of Maryville College with a Bachelor of Arts in History and a Juris Doctor graduate of the Louis D. Brandeis School of Law at the University of Louisville. She has worked with DeRoyal for over 18 years and has considerable responsibility for core legal aspects of the corporation's domestic and international corporate, manufacturing and distribution operations. This includes corporate governance and compliance, litigation management, contract review and drafting, international trade, intellectual property management, employment matters and regulatory compliance. Ms. Kilby is admitted to practice law in the states of Tennessee and Kentucky. She is also admitted to practice before the federal courts located in the Eastern District of Tennessee. In addition to being a member of several professional organizations, Ms. Kilby serves as co-chair of the Knoxville Bar Association's Corporate Counsel Section and as President of the Maryville College National Alumni Association.



Teah Glenn Kirk – Teah.Kirk@ClaytonHomes.com

Teah Glenn Kirk currently serves as Associate General Counsel of Clayton Homes, one of the largest home builders in the nation. The Clayton family of companies builds, sells, finances, leases, and insures manufactured, modular, and site-built homes. In her role as in-house compliance counsel, Teah advises internal clients on all aspects of home sales and lending products. She assists in managing corporate compliance at the state and federal levels and also aids the business in developing new products, interpreting new laws, implementing compliance program initiatives, and developing policies and procedures. Prior to her current role, Teah worked in the private sector as a commercial litigator. In her practice, she amassed a sought-after skill set in the financial services arena, specializing in managing the liabilities of national and state-chartered banks, bank holding companies, commercial banks, lenders, and trust companies. Teah received a B.A. in Criminal Justice from Clark Atlanta University before obtaining a J.D. from University of Georgia School of Law.

3:30 – 4:30 p.m.

What You Need to Know About Construction Contracts - 1 hour of General CLE Credit

Adrienne L. Anderson, Anderson Busby PLLC

Attendees will learn about the inherent risks in construction projects and ways to mitigate those risks through proper drafting and negotiation of construction contracts. Concentrating on anticipating and avoiding or providing remedies to issues that plague every complex project, our speaker will offer best practices for negotiating against surprises and some legal challenges affecting the construction industry.

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Adrienne L. Anderson – aanderson@andersonbusby.com

Adrienne is a founding member of Anderson Busby PLLC. Ms. Anderson's practice includes commercial transactions and litigation, focusing on employment law, business disputes, contracts, property issues, and construction law. She represents both individuals and businesses. Ms. Anderson handles trials and appeals in state and federal courts, as well as proceedings before state and federal administrative agencies. Her experience includes appellate practice, arbitration, mediation, and class action litigation. Ms. Anderson is certified as an arbitrator with the American Arbitration Association Construction Industry Panel. She is certified by the Tennessee Supreme Court Alternative Dispute Resolution Commission as a Rule 31 Listed General Civil Mediator. Ms. Anderson is a certified mediator in the Federal Mediation Program of the United States District Court for the Eastern District of Tennessee. She teaches seminars on employment, contracts, and construction law for attorneys, businesses, civic groups, and professional organizations.

FRIDAY TRACK 3 - TECH UPDATES (4 Sessions) – Room 400A

10:15 – 11:15 a.m.

Using Practice Management Systems to Streamline Processes - 1 hour of Dual CLE Credit

Natalie Kelly, Director of the State Bar of Georgia's Law Practice Management Program, Atlanta GA

With increasing pressure and mounting competition, it is important to operate efficiently. Many practice management systems offer readily available automation options to facilitate your firm's move to streamlined delivery of legal services via automation. Learn what automation is available and how it works in this session.



Natalie Kelly – nataliek@gabar.org

Natalie Robinson Kelly is the Director of the State Bar of Georgia's Law Practice Management Program. She received her Bachelor of Arts degree in English with a minor in Political Science from Spelman College and her Juris Doctorate from Atlanta's John Marshall Law School. Prior to attending law school, she taught Law Office Management as an Adjunct Professor at Atlanta's John Marshall Law School; and she held positions in education, commercial real estate, hospitality, and small law firm practice. In 2005, she was selected State Bar of Georgia Employee of the Year. At the State Bar serving as Georgia's PMA (Practice Management Advisor), she has conducted over 1,200 on-site management and technology consulting engagements with law firms and legal departments. She also now co-teaches Law Practice Technology as an Adjunct Professor at Georgia State University College of Law. Natalie is a Certified Consultant for multiple legal software applications, and has served on many legal technology advisory boards. She was named to the American Bar Association's inaugural list of Women in Legal Tech; and in 2014, she chaired the ABA TECHSHOW Planning Board. She was selected as a Fastcase 50 honoree for being one of the law's smartest, most courageous innovators, techies, visionaries, and leaders; and is a fellow in the College of Law Practice Management. Natalie speaks frequently and has presented in 15 states, Puerto Rico and the U.S. Virgin Islands. Natalie is active in the Law Practice Division of the American Bar Association including having served on the Division's Council. In 2016, Natalie won the Division's highest publication honor, the Robert P. Wilkins Award for best feature article in the Division's magazine, Law Practice. She is currently a member of the Division's Professional Development Board. She also writes a regular column in the Georgia Bar Journal; and is the co-author of the blog, Georgia Practice Advisor, offering office management, ethics and technology tips and advice to legal professionals in Georgia.

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11:30 a.m. – 12:30 p.m.

A Rundown on Specific Practice Management Software Tools - 1 hour of Dual CLE Credit

Natalie Kelly, Director of the State Bar of Georgia's Law Practice Management Program, Atlanta GA

Watch as the presenter in this session shows you exactly how some of the leading practice management tools work while answering your questions about how these programs can specifically work for you. Join her as she creates and tracks a legal case file from the stage of a prospective client to a closed file.



Natalie Kelly – nataliek@gabar.org

Natalie Robinson Kelly is the Director of the State Bar of Georgia's Law Practice Management Program. She received her Bachelor of Arts degree in English with a minor in Political Science from Spelman College and her Juris Doctorate from Atlanta's John Marshall Law School. Prior to attending law school, she taught Law Office Management as an Adjunct Professor at Atlanta's John Marshall Law School; and she held positions in education, commercial real estate, hospitality, and small law firm practice. In 2005, she was selected State Bar of Georgia Employee of the Year. At the State Bar serving as Georgia's PMA (Practice Management Advisor), she has conducted over 1,200 on-site management and technology consulting engagements with law firms and legal departments. She also now co-teaches Law Practice Technology as an Adjunct Professor at Georgia State University College of Law. Natalie is a Certified Consultant for multiple legal software applications, and has served on many legal technology advisory boards. She was named to the American Bar Association's inaugural list of Women in Legal Tech; and in 2014, she chaired the ABA TECHSHOW Planning Board. She was selected as a Fastcase 50 honoree for being one of the law's smartest, most courageous innovators, techies, visionaries, and leaders; and is a fellow in the College of Law Practice Management. Natalie speaks frequently and has presented in 15 states, Puerto Rico and the U.S. Virgin Islands. Natalie is active in the Law Practice Division of the American Bar Association including having served on the Division's Council. In 2016, Natalie won the Division's highest publication honor, the Robert P. Wilkins Award for best feature article in the Division's magazine, Law Practice. She is currently a member of the Division's Professional Development Board. She also writes a regular column in the Georgia Bar Journal; and is the co-author of the blog, Georgia Practice Advisor, offering office management, ethics and technology tips and advice to legal professionals in Georgia.

2:00 – 3:00 p.m.

Designing the Law Firm of the Future - 1 hour of Dual CLE Credit

Erin Gerstenzang, EHG Law Firm, Atlanta GA

The law firm of the next 5, 10, or 20 years looks nothing like law firms of the recent past. Today's inexpensive yet highly effective technology tools enable lawyers to build firms they love to run, where they can exceed client expectations and design their professional lives on their own terms. Lawyers can meet countless challenges of the profession ethically and effectively if they know what tools to use and where to find them. In this presentation, we highlight law firms who are using these tools and how they are doing it, explain how they meet ethical and professional obligations, and demonstrate how law firms can continue to evolve over the coming years to deliver more and better legal services.



Erin Gerstenzang – erin@ehglawfirm.com

Erin Gerstenzang founded EHG Law Firm, which is located in Atlanta, Georgia. She provides client-centered legal services to clients facing drug and alcohol-related criminal offenses, and subscription legal services to new hemp businesses in Georgia. Early on in her career as a trial attorney, Erin discovered a passion for helping other professionals improve their craft, and she built a national reputation as a sought-after speaker on a variety of technology and practice topics, including legal ethics, design-thinking for law firms, automation, paperless systems, social media, and mentorship. Combining both her trial skills and talent for speaking, she excels at reducing the complicated and difficult down to the simple and actionable. Erin also runs the EHG Law Firm Collective, where she leads a collaborative female mentorship-

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based group focused on developing legal and business skills to accelerate solo law firm success. She was honored by Fastcase 50 in 2018 and recognized by the ABA's Legal Technology Resource Center as one of the honorees of the Women in Legal Tech 2019. She is on the ABA TECHSHOW Planning Board and she co-organizes the Atlanta Legal Tech Group. She serves on the board of directors of the Georgia Association for Women Lawyers, and she was a recipient of their GAWL Visionary Award in 2019. She chairs the Judicial Recommendation Committee of the Georgia Association of Criminal Defense Attorneys and is on their long-range planning committee.

3:30 – 4:30 p.m.

Artificial Intelligence Tools in the Practice of Law - 1 hour of Dual CLE Credit

Sean J. Martin, Martin Heller Potempa & Sheppard, PLLC, Nashville TN

Many of the tools lawyers use today – online research platforms that suggest other areas for research, software packages that help complete forms or propose or assemble document language, and discovery tools that sort through documents – are driven by artificial intelligence and machine learning. This program will look at some of the ethical obstacles and opportunities as lawyers incorporate artificial intelligence into the day-to-day practice of law. We also explore what AI is and what it isn't. (Hint: the robots are not coming for your jobs!)



Sean J. Martin - smartin@mhpplaw.com

Sean J. Martin is a partner at Martin Heller Potempa & Sheppard, PLLC in Nashville. His practice is divided evenly between family law and personal injury. He is also the co-founder of Time Miner, a retroactive billing platform for lawyers who bill by the hour. Sean is an advocate of #legaltech. He enjoys sharing his knowledge and enthusiasm with others, and is grateful to the bar associations across the country who provide him the opportunity to do so.