

Networking

Thursday, March 7

at the D.C. Bar, 901 Fourth Street NW at Noon. The program is ***Managing IOLTA with Capital One***, presented by Hani Ramadan and Kerstin Veltze of [Capital One](#). RSVP to lunchandlearn@dcbar.org

Friday, March 8

at **Alto Fumo**, 2909 Wilson Boulevard, Arlington, VA (Clarendon Metro) at 12:30 p.m. RSVP to steven@stevenkriegerlaw.com

Thursday, March 28

at the D.C. Bar, 901 Fourth Street NW at Noon. The program is ***Increasing Law Firm Profitability: More Than Just Raising Rates***, presented by [Deborah Shaefer, CPA](#). RSVP to lunchandlearn@dcbar.org

Lunch and Learn

Practice Management Advisory Service



Small Firm Lunch and Learn Series

All programs begin at Noon. You may attend in person or by our Zoom video conference link. Register for any or all at lunchandlearn@dcbar.org

March 7, 2019 — *Managing IOLTA with Capital One*, by Hani Ramadan and Kerstin Veltze of Capital One. Capital One Escrow Express for Lawyers is a state-of-the-art virtual sub-accounting system where you can manage and track escrow funds easily and efficiently. Decide when, where and how you want to process account transactions with secure, 24/7 web-based access via Intellix, Capital One's online treasury management portal. Go online to view your entire escrow relationship, open and close sub-accounts, make allocations and transfers, download or run statements on demand and more.

March 28, 2019 — *Increasing Law Firm Profitability: More Than Just Raising Rates*, by Deborah Shaefer, CPA. Increasing profits is the goal of most businesses. The challenge for lawyers can be especially overwhelming. There are only so many hours available to work each day and raising rates may not be an option. Evaluating and managing matter profitability can provide a means to increase income. This session is designed to help you understand the components that impact matter profitability. With this understanding you can identify areas where you can increase productivity and your firm's profits.

The *Lunch and Learn Series* is [here](#). New programs are added regularly. Recaps and materials from recent programs are [here](#).

If you have an idea for a program, let us know at: lunchandlearn@dcbar.org

Friday, March 29

at **Barrel & Crow**, 4867
Cordell Avenue,
Bethesda (Bethesda
Metro) at 12 Noon.
RSVP to
rsjillions@gmail.com

*Law is a relationship
business. Bring cards
to share. Do RSVP so
you will be notified of
any event updates.*

PMAS Event Calendar

- **March 7** – Lunch and Learn.
Managing IOLTA with Capital One.
- **March 9** –
Saturday,
Basic Training & Beyond.
- **March 13** – Day 1
of *Basic Training & Beyond*
- **March 20** – Day 2
of *Basic Training & Beyond.*
- **March 28** – Lunch and Learn,
Increasing Law Firm Profitability: More Than Just Raising Rates.



Our monthly [Basic Training & Beyond](#), is set for March 13 and 20, 2019 / 9:15 a.m. – 4:30 p.m. Register: BasicTraining@dcbar.org This program has been presented 222 times for more than 3,000 lawyers over the last eleven years and many have launched and are operating small law firms. One-day [Saturday sessions](#) are offered on March 9 and May 18, 2019.

May 17, 2019

Save the date for the 5th Annual Practice 360° | A Day for Lawyers & Law Firms.

[Click here](#) for a video preview

Join us for this annual program sponsored by the Bar's Practice Management Advisory Service. Don't miss what over 400 members have already experienced by attending this full day of seminars and events. Topics include firm management, technology, ethics, wellness, and business development. This event features:

- Cutting-edge content and experienced speakers;
- A showcase of product and service vendors;
- Networking opportunities;
- Opportunity for discounted onsite CLE; and
- Breakfast, lunch and an afternoon reception.

From the Desks of Dan and Rochelle



Daniel M. Mills, assistant director, D.C. Bar Practice

Handling advance fees and other IOLTA eligible funds can be challenging even for experienced lawyers. If you want a refresher, come or tune-in to our Thursday Noon program on a bank's online trust account platform. After the program, sometime around 1 to 1:30 p.m., I'll cover the basics of opening an IOLTA, handling advance fees, and the record keeping requirements of [DCRPC 1.15](#). You

Ethics

What are your obligations to a prospective client?

Read [Legal Ethics Opinion 374](#) to find out.

Have you read the Legal Ethics Opinions on social media and lawyers? They are here: [LEO 370](#) and [LEO 371](#)

Check the small firm legal trends and compensation reports [here](#).

The new e-Manual for *Basic Training & Beyond* can be downloaded [here](#).

For more information on PMAS programs, [click here](#).

Other Events

Continuing Legal Education programs are [here](#).

Communities Events are [here](#).

Pro Bono Center training programs are scheduled [here](#).

Management Advisory Service



Rochelle Washington, senior attorney, D.C. Bar Practice Management Advisory Service

may attend the [live program](#) or join us on the Zoom

link: <https://zoom.us/j/949755405> Be sure to register at LunchAndLearn@DCBar.org

--Dan

Tips for Selecting Technology for Your Law Office

One of the common mistakes lawyers make when selecting technology is simply doing what they see a colleague or another law firm doing and assuming that they should do exactly the same. It is extremely important to know why you want to implement technology before you start buying software and gadgets. Let's start with how to determine what you need. Consider where within your internal workflows you can *Automate, Delegate or Eliminate a portion of, or all of a process*. You can ask yourself those three questions for any process and ask in any order. To determine what you need you must write down your work flows for every process in your office. Write out exactly what you do and how you do it. Processes include things such as: client intake, setting up files, billing, replying to and sending e-mail, docketing for your calendar and so on. How you work and move will be unique to you as an individual, the type of law practice you have and the people you work with. Once you write out these processes, take a step back and look at your workflow to determine where you can automate the process, delegate a task within the process, or possibly eliminate the process,

or a portion of the process, altogether.
The idea is to be more efficient while you
work. Now you are prepared to begin
seeking out the specific technology tools
to suit your law firm.

--Rochelle



District of Columbia Bar, 901 4th St NW, Washington, DC 20001