





# 2026 CLM STUDY GROUP SCHEDULE


## FINANCE

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	CLM CREDIT INFO
Wednesday, April 29 8:00 am – 9:00 am	<b>FINANCE #1</b> Tax forms, banking, separation of duties, internal controls, legal ethics, retainers, trust accounting, hard and soft costs, RULES, profits per partner	Michael Hill CFO Gould & Ratner <a href="mailto:MHill@gouldratner.com">MHill@gouldratner.com</a> ALA Chicago Chapter Member	 <p><b>CLM® Application Credit:</b> 1 hour in the subject area of Organizational Development.</p> <p><b>CLM® Application Credit for Functional Specialists:</b> 1 hour in the subject area of Financial Management (FM) towards the additional hours required of some Functional Specialists to fulfill the CLM application.</p> <p><b>CLM® Recertification Credit:</b> 1 hour in the subject area of Financial Management (FM)</p>
Wednesday, May 6 8:00 am – 9:00 am	<b>FINANCE #2</b> Debits and credits, general journal, general ledger, trial balance, financial statements, fixed assets and depreciation, GAAP, accrual v. cash v. modified cash, revenue recognition, matching, net income v. distributable income	Michael Hill CFO Gould & Ratner <a href="mailto:MHill@gouldratner.com">MHill@gouldratner.com</a> ALA Chicago Chapter Member	
Wednesday, May 13 8:00 am – 9:00 am	<b>FINANCE #3</b> Budgeting and variance analysis, equipment leasing, equity financing	Michael Hill CFO Gould & Ratner <a href="mailto:MHill@gouldratner.com">MHill@gouldratner.com</a> ALA Chicago Chapter Member	
Wednesday, June 3 8:00 am – 9:00 am	<b>FINANCE #4</b> Financial ratios, AFA types, accounting terms	Michael Hill CFO Gould & Ratner <a href="mailto:MHill@gouldratner.com">MHill@gouldratner.com</a> ALA Chicago Chapter Member	
Wednesday, October 14 8:00 am – 9:00 am	<b>FINANCE #5</b> Final Review and Q&A	Michael Hill CFO Gould & Ratner <a href="mailto:MHill@gouldratner.com">MHill@gouldratner.com</a> ALA Chicago Chapter Member	


## HUMAN RESOURCES

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	CLM CREDIT INFO
Wednesday, June 10 8:00 am – 9:00 am	<b>HUMAN RESOURCES #1</b> “The Acts” Federal Employment Laws	Antonio Caldarone, Esq. Andie Rodriguez Laner Muchin	 <p><b>CLM® Application Credit:</b> 1 hour in the subject area of Organizational Development.</p> <p><b>CLM® Application Credit for Functional Specialists:</b> 1 hour in the subject area of Human Resources Management (HR) towards the additional hours required of some Functional Specialists to fulfill the CLM application.</p> <p><b>CLM® Recertification Credit:</b> 1 hour in the subject area of Human Resources Management (HR)</p>
Wednesday, June 17 8:00 am – 9:00 am	<b>HUMAN RESOURCES #1</b> Employee v. Independent Contractor Exempt v. Non-Exempt Employment at Will	David L. Weinstein, Esq. TAFT Law Firm	
Wednesday, June 24 12:00 pm – 1:00 pm	<b>HUMAN RESOURCES #3</b> FMLA	David N. Michael, Esq. Gould & Ratner	
Wednesday, July 15 12:00 pm – 1:00 pm	<b>HUMAN RESOURCES #4</b> Employee Benefits and Insurance: Health Insurance, Life Insurance, HIPAA, STD, LTD, COBRA, ERISA, Defined Benefit Plans	Bill Gimbel – Speaker Panel <i>President</i> LaSalle Benefits	
Wednesday, July 22 8:00 am – 9:00 am	<b>HUMAN RESOURCES #5</b> FMLA / ADA / Workers Comp How they intertwine when employees are absent	Jeralyn H. Baran, Esq. Kilpatrick	
Wednesday, July 29 8:00 am – 9:00 am	<b>HUMAN RESOURCES #6</b> The EEOC Process: EEOC investigations, laws enforced by EEOC, prohibited practices, recordkeeping, responding to a charge, mediation, right to sue.	Scott D. Watson, Esq. <i>Office Administrator</i> Quarles & Brady <i>ALA Chicago Chapter Member</i>	
Wednesday, August 5 8:00 am – 9:00 am	<b>HUMAN RESOURCES #7</b> Performance Management – Training, Motivation and Learning	Scott D. Watson, Esq. <i>Office Administrator</i> Quarles & Brady <i>ALA Chicago Chapter Member</i>	


## LEGAL INDUSTRY/BUSINESS MANAGEMENT

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	CLM CREDIT INFO
Wednesday, August 12 8:00 am – 9:00 am	Business Insurance as it Relates to Law Firms	Kelley Larson Nick Day NFP	 <p><b>CLM® Application Credit:</b> 1 hour in the subject area of Organization Development.</p> <p><b>CLM® Application Credit for Functional Specialists:</b> 1 hour in the subject area of Legal Industry/ Business Management (LI) towards the additional hours required of some Functional Specialists to fulfill the CLM application.</p> <p><b>CLM® Recertification Credit:</b> 1 hour in the subject area of Legal Industry/ Business Management (LI)</p>
Wednesday, August 26 8:00 am – 9:00 am	Disaster Planning / Business Continuity	Kathryn Scourby KNS Consulting	
Wednesday, September 2 8:00 am – 9:00 am	Space Planning and Leasing	Jon Milonas CBRE	
Wednesday, September 30 12:00 pm – 1:00 pm	Records Management / Project Management	Tracey Nobis, CLM <i>ALA Chicago Chapter Member</i>	

## ETHICS – ABA MODEL RULES

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	SPEAKER ZOOM LINK
<p>Wednesday, October 7 8:00 am – 9:00 am</p>	<p>ABA Model Rules of Professional Conduct</p>	<p>Anisa Jordan ARDC Counsel, Ethics Education</p>	 <p><b>CLM® Application Credit:</b> 1 hour in the subject area of Organization Development.</p> <p><b>CLM® Application Credit for Functional Specialists:</b> 1 hour in the subject area of Legal Industry/ Business Management (LI) towards the additional hours required of some Functional Specialists to fulfill the CLM application.</p> <p><b>CLM® Recertification Credit:</b> 1 hour in the subject area of Legal Industry/ Business Management (LI)</p>

## TECHNOLOGY

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	SPEAKER ZOOM LINK
Wednesday, September 9 8:00 am – 9:00 am	Technology and Cyber Security	Sue Keno Keno Kozie Associates	 <p><b>CLM® Application Credit:</b> 1 hour in the subject area of Information Technology.</p> <p><b>CLM® Application Credit for Functional Specialists:</b> 1 hour in the subject area of Operations Management (OM) towards the additional hours required of some Functional Specialists to fulfill the CLM application.</p> <p><b>CLM® Recertification Credit:</b> 1 hour in the subject area of Operations Management (OM)</p>
Wednesday, September 23 8:00 am – 9:00 am	HIPAA Compliance in Law Firms	David Constantine <i>Former ALA President</i> Logical Computer Solutions	

## TEST REVIEW

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	CLM CREDIT INFO
Thursday, October 22 10:30 – 11:30 am	Test Taking Tips	Kristi Seaton, CLM Karen Kirby, CLM	N/A