





CLM STUDY SCHEDULE FOR NOVEMBER 2020 EXAM

FINANCE

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	CLM CREDIT INFO
Wednesday, August 5 8:00 am – 9:00 am	FINANCE #1 Tax forms, banking, separation of duties, internal controls, legal ethics, retainers, trust accounting, hard and soft costs, RULES, profits per partner	Michael Hill <i>Controller</i> Gould & Ratner MHill@gouldratner.com <i>ALA Chicago Chapter Member</i>	 <p>CLM® Recertification Credit: 1 hour in the subject area of Financial Management (FM)</p> <p>CLM® Application Credit for Functional Specialists: 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>
Wednesday, August 12 8:00 am – 9:00 am	FINANCE #2 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 <i>Controller</i> Gould & Ratner MHill@gouldratner.com <i>ALA Chicago Chapter Member</i>	
Wednesday, August 19 8:00 am – 9:00 am	FINANCE #3 Budgeting and variance analysis, equipment leasing, equity financing	Michael Hill <i>Controller</i> Gould & Ratner MHill@gouldratner.com <i>ALA Chicago Chapter Member</i>	
Tuesday, August 25 8:00 am – 9:00 am	FINANCE #4 Financial ratios, AFA types, accounting terms	Michael Hill <i>Controller</i> Gould & Ratner MHill@gouldratner.com <i>ALA Chicago Chapter Member</i>	
Wednesday, November 11 8:00 am – 9:00 am	FINANCE #5 Finance Review and Q&A	Michael Hill <i>Controller</i> Gould & Ratner MHill@gouldratner.com <i>ALA Chicago Chapter Member</i>	


ETHICS – ABA MODEL RULES

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	CLM CREDIT INFO
Thursday, August 27 8:00 am – 9:00 am	ABA Model Rules of Professional Conduct	John Cesario, Esq. ARDC Litigation Counsel jcesario@iadc.org	 <p>CLM® Recertification Credit: 1 hour in the subject area of Legal Industry/ Business Management (LI)</p> <p>CLM® Application Credit for Functional Specialists: 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>


TECHNOLOGY

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	CLM CREDIT INFO
Wednesday, September 2 12:00 pm – 1:00 pm	Technology and Cyber Security	Sue Keno Keno Kozie Associates	 <p>CLM® Recertification Credit: 1 hour in the subject area of Operations Management (OM)</p> <p>CLM® Application Credit for Functional Specialists: 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>CLM® Application Credit: 1 hour in the subject area of Information Technology</p>
Wednesday, September 9 8:00 am – 9:00 am	HIPAA Compliance in Law Firms	David Constantine <i>Former ALA President</i> Logical Computer Solutions David@logicalus.com	

OFFICE OPERATIONS / LEGAL INDUSTRY

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	CLM CREDIT INFO
Tuesday, September 15 12:00 pm – 1:00 pm	Records Management / Project Management	Tracey Nobis, CLM Manager, Legal Operations <i>ALA Chicago Chapter Member</i>	 <p>CLM® Recertification Credit: 1 hour in the subject area of Legal Industry/ Business Management (LI)</p> <p>CLM® Application Credit for Functional Specialists: 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>
Tuesday, September 22 8:00 am – 9:00 am	Business Insurance as it Relates to Law Firms	Michael Welbel Risk Strategies mwelbel@risk-strategies.com	
Thursday, September 24 8:00 am – 9:00 am	Space Planning and Leasing	Jon Milanos CBRE Jon.milonas@cbre.com	

HUMAN RESOURCES

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	CLM CREDIT INFO
Wednesday, September 30 12:00 pm – 1:00 pm	HUMAN RESOURCES #1 Employee Benefits and Insurance: Health Insurance, Life Insurance, HIPAA, STD, LTD, COBRA, ERISA, Defined Benefit Plans	Bill Gimbel <i>President</i> LaSalle Benefits Bgimbel@lasallebenefits.com	 <p>CLM® Recertification Credit: 1 hour in the subject area of Human Resources Management (HR)</p> <p>CLM® Application Credit for Functional Specialists: 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>
Tuesday, October 6 8:00 am – 9:00 am	HUMAN RESOURCES #2 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 Scott.Watson@quarles.com <i>ALA Chicago Chapter Member</i>	
Thursday, October 8 8:00 am – 9:00 am	HUMAN RESOURCES #3 “The Acts” Federal Employment Laws	Sherrie Travis, Esq. Sherrie Travis & Assoc. travis@sherrietravis.com	
Tuesday, October 13 8:00 am – 9:00 am	HUMAN RESOURCES #4 Performance Management – Training, Motivation and Learning	Scott D. Watson, Esq. <i>Office Administrator</i> Quarles & Brady Scott.Watson@quarles.com <i>ALA Chicago Chapter Member</i>	
Tuesday, October 20 8:00 am – 9:00 am	HUMAN RESOURCES #5 Employee v. Independent Contractor Exempt v. Non-Exempt Employment at Will	David L. Weinstein, Esq. TAFT Law Firm dweinstein@TAFTLAW.com	
Tuesday, October 27 8:00 am – 9:00 am	HUMAN RESOURCES #6 FMLA	David N. Michael, Esq. Gould & Ratner dmichael@gouldratner.com	
Tuesday, November 3 8:00 am – 9:00 am	HUMAN RESOURCES #7 FMLA / ADA / Workers Comp How they intertwine when employees are absent	Kevin Kelly, Esq. Locke Lord LLP kkelly@lockelord.com	

FINAL REVIEWS

DATE / TIME (CENTRAL TIME)	SESSION DESCRIPTION	SPEAKER INFO	CLM CREDIT INFO
Wednesday, November 11 8:00 am – 9:00 am	Finance – Final Review and Q&A	Michael Hill <i>Controller</i> Gould & Ratner MHill@gouldratner.com	N/A
Thursday, November 19 11:00 am – 11:45 am	Test Taking Tips	Rita Nielsen, CLM Karen Kirby, CLM <i>ALA Chicago Chapter Members</i>	N/A

TEST DATE: NOVEMBER 23, 2020