

Solo and Small Firm Summit

September 9, 2026 | Hilton Garden Inn, Freeport
Live Program

CLE Credits: 6.0, including 1.0 ethics & 1.0 H&D

This program has been approved for practice and procedure credit under Maine's reciprocal admission rule.



SCHEDULE AND FACULTY

8:00 REGISTRATION AT THE HILTON GARDEN INN

8:30 FROM INTAKE TO OUTCOME: DESIGNING A CLIENT EXPERIENCE THAT BUILDS TRUST AND REFERRALS

Client experience is one of the most powerful—and underused—tools for building a successful solo or small firm practice. This session examines the client journey from initial contact through case resolution, highlighting key moments where communication, expectations, and systems either build trust or create frustration. Using practical litigation-based examples, attendees will learn simple, repeatable strategies to improve responsiveness, manage expectations, and create a more consistent, professional client experience. The result is stronger client relationships, fewer complaints, and increased referrals. All attendees will receive customizable templates and checklists for immediate use in their practice.

Christiana E. Mann, Esq., Mann Law LLC

9:30 BREAK

9:45 FROM CHAOS TO CASH FLOW: THE KPI FLYWHEEL FOR SOLO AND SMALL FIRM HEALTH

Most solo and small firm attorneys are running a practice—but haven't yet made the shift to running a business. This session introduces the KPI Flywheel, a practical framework for measuring firm health through key financial and operational metrics. Attendees will learn how leading indicators, such as pipeline and utilization, connect to outcomes like collections and profitability, and leave with a simple system for making better business decisions and building a stronger practice.

Andrew Wood, Wood Consulting Group

10:45 BREAK

10:55 FEES AND FILES: WHAT IS REASONABLE AND REQUIRED (ETHICS)

This session will provide a review of Maine Rules of Professional Conduct 1.5 and 1.15, and relevant PECs, offering some tips on adhering to these rules that may be useful for small and solo practices.

Mara R. King, Esq., Board of Overseers of the Bar

11:55 LUNCH (INCLUDED)

1:00 THINGS THEY DON'T TEACH YOU IN LAW SCHOOL

Designed for new attorneys, this session draws on 33 years of solo and small firm experience. The goal is to give practical advice on subjects they do not teach you in law school, including but not limited to client management, billing and collections, practice management systems, professional communication, and the day-to-day realities of running a small practice.

Joseph W. Baiungo, Esq., Law Office of Joseph Baiungo

2:00 BREAK

2:15 DON'T BE THE DEFENDANT! COPYRIGHT AND TRADEMARK TIPS FOR RUNNING YOUR PRACTICE

Learn or brush up on basic copyright and trademark concepts, with real-world examples involving solo, small firm, and even big law defendants. The session examines trademark disputes over law firm names, the role of trademarks in domain disputes, copyright ownership between firms and creative vendors, common misunderstandings about music and image licensing, use of case experiences as inspiration for books and films, and key red flags to watch for in general practice.

Elizabeth T. Russell, Esq., Law Office of Elizabeth T. Russell LLC

3:15 BREAK

3:30 BOUNDARIES, BIAS & BURNOUT: MANAGING HARASSING CLIENTS IN SOLO & SMALL FIRMS (H&D)

Explores the unique challenges solo and small firm attorneys face when harassment or discriminatory conduct originates from clients. The program examines conduct based on protected characteristics and discusses ethical obligations when balancing workplace safety, professional responsibility, and the realities of small practice. It also addresses practical strategies for recognizing, responding to, and documenting harassing or discriminatory behavior, as well as when terminating a client relationship may be appropriate. Particular emphasis is placed on the cumulative emotional and professional impact of tolerating such conduct, including effects on attorney well-being, staff retention, firm culture, and burnout.

Caitlin L. LoCascio-King, Esq., LoCascio-King Law, LLC (Program Chair)

4:30 ADJOURN

Meeting Information

In-Person at the Hilton Garden Inn, Freeport

Registration: Registration for the Hilton Garden Inn is **capped at 100** and will close on **Sept. 7**, or when capacity is reached.

Walk-In Registration: If registration is full prior to the program, walk-in registrations **will not be allowed**. We recommend pre-registering or calling ahead before arriving at the Hilton. Payment is required at registration.

Canceling from the Live Program at the Hilton Garden Inn: You may cancel your registration for a full refund until **4:00 p.m. on Sept. 1**. **No refunds** will be issued after this time. The date of cancellation is the date received at Bar Headquarters in Augusta.

Photography: Registrants, instructors and exhibitors attending a MSBA CLE event agree they may be photographed during the event. Photographic materials are the sole property of the MSBA. The MSBA reserves the right to use attendees' names and likenesses in promotional materials without any monetary compensation.

Registration Form | Solo & Small Firm Summit | Hilton Garden Inn

Name _____ Bar # _____
Organization _____
Address _____
City _____ State _____ Zip _____
Tel # _____ Email Address _____

Payment Information

☐ Check Enclosed # _____ Total \$ _____

Card # _____ Exp. date _____ CSC Code _____

Name on card _____

Billing address _____

Telephone # _____ Signature _____

Registrations cannot be processed without payment by check or credit card.

Hilton Garden Inn Pricing

MSBA Member ☐ \$275
CLE Club Member..... ☐ \$175
Support Staff of CLE Club Member .. ☐ \$175
Paralegals and Support Staff ☐ \$185
Non-Member..... ☐ \$350
MSBA Student Member..... ☐ \$ 25

CLE Club: MSBA Members Only

Celebrating the MSBA's 135th anniversary with a prorated CLE Club rate.

July 1 - December 31 ☐ \$67.50

HOW TO REGISTER:

Online: Log in to your website account at www.mainebar.org

Mail: Maine State Bar Association | 124 State Street, Augusta, ME 04330

Phone: 207-622-7554 | **Fax:** 207-623-0083 | **Email:** cle@mainebar.org