

# Solo & Small Firm Summit

September 10, 2025 | Hilton Garden Inn, Freeport

CLE Credits: 6.0, including 1.0 Ethics & 1.0 H&D credit

*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 BETTER TOGETHER: THE BASICS OF MERGING FIRMS

Many solo and small firms reach a point where merging with another small practice is the right move. Drawing from her recent experience merging her own solo practice, the presenter will walk through the fundamentals of small firm mergers. Topics include business name changes, dissolution, partnership agreements, finances, employees, and more. Note: This session does not cover mergers with larger firms.

*Allison M. Kuhns, Esq., Law Office of Allison Muir Kuhns, LLC*

### 9:30 BREAK

### 9:45 PREPARING FOR A DISASTER (ETHICS)

This presentation will cover disaster preparedness for solo and small firm attorneys, with a focus on practical planning and ethical obligations. Topics include file and client property retention, IOLTA reconciliation, safeguarding passwords and vendor information, and keeping personal and professional data separate. The session will also address Bar Rule 32 on Receivership, including steps to take if you're unable to practice temporarily or permanently, and how to select a suitable proxy.

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

### 10:45 BREAK

### 10:55 TAKING CONTROL OF YOUR RETIREMENT

Join Merrill Lynch Senior Financial Advisor Jaime Clark for an engaging session on retirement planning tailored to sole practitioners and small-firm attorneys. Learn how to prepare for your own retirement at any career stage and how to use retirement benefits to attract and retain top talent. Topics include:

- Tax Considerations
- Contribution Strategies
- Types of Retirement Plans

*Jaime Clark, The Clark Group*

### 11:55 LUNCH (INCLUDED)

### 1:00 CREATING AND INCLUSIVE AND ACCESSIBLE ONLINE PRESENCE

This hands-on session helps solo and small firm attorneys recognize and avoid discriminatory or exclusionary practices in their digital presence. Through a guided website review, participants will identify common pitfalls related to race, disability, age, gender identity, and sexual orientation. The presentation covers inclusive language, accessible website design, and adaptive features for clients with visual, auditory, or cognitive impairments. Attendees will gain practical tools to create welcoming, equitable, and compliant digital spaces in the legal profession.

*Caitlin L. LoCascio-King, Esq., LoCascio-King Law, LLC*

### 2:00 BREAK

### 2:15 THE RIGHT HIRE: A PROVEN 4-PHRASE SYSTEM FOR BUILDING A HIGH-PERFORMING TEAM

Hiring the right team member is critical but often challenging for small firms. This presentation covers the mindset shifts needed to build trust and delegate effectively. You'll learn a proven 4-phase hiring process—from attracting qualified candidates and using video skill assessments, to structured interviews and involving key decision-makers. Gain practical tips to avoid common hiring pitfalls and reduce turnover, so you can focus on practicing law with confidence.

*Melissa Gamarra, Melissa Gamarra Management*

### 3:15 BREAK

### 3:30 HOW EMPLOYMENT LAWS IMPACT SOLO/SMALL FIRMS

Even small businesses are impacted by employment laws and obligations and without an HR department, compliance can be challenging. This session will focus on a range of topics, including hiring, proper postings, policies (and whether to even have them), leave rights, recordkeeping, and compliance with harassment and anti-discrimination requirements. The session will also offer suggestions for where to find helpful information and templates.

*Anne-Marie L. Storey, Esq., Rudman Winchell*

### 4:30 ADJOURN

## PROGRAM CHAIRS:

*Caitlin L. LoCascio-King, Esq. and Allison M. Kuhns, Esq.*

# MEETING INFORMATION: HILTON GARDEN INN, FREEPORT

## REGISTER ONLINE OR BY MAIL:

Register online at [mainebar.org/event/solo25](http://mainebar.org/event/solo25), or submit your registration form via email or mail.

**Note:** Registration for the Hilton Garden Inn is capped at **80 attendees** and will close on **Friday, September 5**, or once capacity is reached — whichever comes first.

## WALK-IN REGISTRATION:

If the event reaches full capacity prior to the program, **walk-in registrations will not be accepted**. We strongly recommend pre-registering or calling ahead to confirm availability before arriving at the Hilton Garden Inn. If space is available, walk-in attendees must provide payment at the time of registration.

## CANCELING FROM THE LIVE PROGRAM:

Cancellations for the live program must be received by **4:00 p.m. on Tuesday, September 2**, to receive a full refund. No refunds will be issued after this deadline. The cancellation date is based on when notice is received at MSBA Headquarters in Augusta.

## PHOTOGRAPHY:

By attending this MSBA CLE event, registrants, instructors, and exhibitors agree that they may be photographed during the program. All photographic materials are the sole property of the MSBA. The MSBA reserves the right to use participants' names and likenesses in promotional materials without compensation.

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

Name \_\_\_\_\_ Bar # \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Tel # \_\_\_\_\_ Email Address \_\_\_\_\_

### Hilton Garden Inn Pricing

MSBA Member .....  \$250  
CLE Club Member .....  \$175  
Support Staff of CLE Club Member..  \$175  
Paralegals and Support Staff .....  \$185  
Non-Member .....  \$325  
MSBA Student Member.....  \$ 25

### CLE Club Membership

#### MSBA Members Only

CLE Club Membership\* .....  \$82.50  
\*Prorated until Sept. 30.  
Call the CLE Department for more information.

### Payment Information

Check Enclosed # \_\_\_\_\_

Total \$ \_\_\_\_\_



Card # \_\_\_\_\_

Exp. Date \_\_\_\_\_

CSC Code \_\_\_\_\_

Name on CC \_\_\_\_\_

Billing Address \_\_\_\_\_

Telephone \_\_\_\_\_

Signature \_\_\_\_\_

### PLEASE COMPLETE AND RETURN TO:

Maine State Bar Association | 24 State Street, Augusta, ME 04330  
Phone: 207-622-7554 | Fax: 207-623-0083 | Email: [cle@mainebar.org](mailto:cle@mainebar.org)