



## Registration Information

**Payment:** Multiple registrants may use separate forms and payments may be made with a single check or credit card. Please keep a copy of this brochure; you will not receive a confirmation.

**Refunds:** Registration fees are refunded, less \$25 for handling, for written cancellations post-marked or faxed by 5:00 p.m. 5 business days before the program. No refunds are made after that date, but you will receive the course book.

**Data:** If you don't want your registration data entered in WSBA member records, please advise.

**Mail:** Send your completed registration form with payment to WSBA, 1325 Fourth Avenue, Suite 600, Seattle, WA 98101-2539.

**Phone:** Call WSBA Service Center at 800-945-WSBA(9722) or 206-443-WSBA(9722). Please have your credit card and registration form in hand when you call and cite seminar code **LO-MOTR91709** or **LOMOTR91809**, depending on city.

**Fax:** 206-727-8320 Please include Visa or Mastercard information when faxing your completed registration form.

**Internet:** questions@wsba.org Email your registration with Visa or Mastercard information.

**Walk-in:** You may register at the seminar. Materials may be delayed. Call prior to the seminar to check availability.

**Questions:** Please call the WSBA Service Center at 800-945-WSBA or 206-443-WSBA OR email juliesa@wsba.org.



**WSBA**  
LAWYER SERVICES DEPARTMENT

# LOMAP & ETHICS ... ON THE ROAD™

## The 2009 Traveling Seminar will feature:

*What You May Not Know About  
Client Trust Accounts*

*The Rules, Regulations and Common Sense of  
Managing Client Trust Accounts*

*What's New in Ethics?*

*Your Practice Ends Someday:  
Ethical Considerations*

*Lawyers Do Not Live Forever*

*Time & Billing*

And a Continental Breakfast!

**\*\*NOT ALL TOPICS WILL BE PRESENTED AT EACH SEMINAR!\*\***



## LOMAP & ETHICS ... ON THE ROAD™



**Law Office Management  
Assistance Program**

presents

### The 2009 Traveling Seminar!

**4.00 CLE Credits, (3 ethics) Only \$99!**

8:00 a.m.— Noon

*Continental Breakfast Included!*

**November 17 Aberdeen**

*GuestHouse Inn & Suites*

**November 18 Port Orchard**

*Clubhouse at McCormick Woods*

*"... and bring a staff person!"*



See [www.lomap.org](http://www.lomap.org) for other dates  
and cities!

Tel: 800-945-WSBA(9722) or 206-  
443-WSBA

# LOMAP & ETHICS . . . On the Road™

## The 2009 Traveling Seminar!

4.0 CLE credits (3 ethics)

7:30—8:00 am: Registration & Breakfast

8:00 a.m.—12 Noon—Seminar

Registration Form for Attorneys and Staff  
The 2009 Traveling Seminar

### Seminar Highlights

#### \*What You May Not Know About

**Client Trust Accounts:** Are you aware of the recent changes to the trust account rules? Find out how you can make sure you are in compliance.

#### \*The Rules, Regulations and Common Sense of Managing Client Trust

**Accounts:** What is the point of all these rules anyway? Find out exactly what the trust account rules are designed to do.

**What's New in Ethics?** A review of updates to the RPC's in the last year and what's on the horizon.

**Your Practice Ends Someday: Ethical Considerations** How to plan for the end of your practice and comply with your ethical obligations.

**\*Lawyers Do Not Live Forever:** What are the implications for clients if the lawyer dies? We want you to be prepared with proper planning to avoid a difficult situation for your family.

**\*Time and Billing:** Let's take a look at ways to ease this nagging task. Set goals and use procedures that members around Washington find helpful.

### About the Speakers

**\*Peter Roberts** has his MBA from The College of William & Mary and a Certificate as Small Business Webmaster from the University of Washington. He has 18 years of experience as a legal administrator. Peter has consulted with over 400 WSBA members. Peter is Practice Management Advisor in the Law Office Management Assistance Program (LOMAP) of the Washington State Bar Association.

**David Powell** is the Professional Responsibility Counsel for the Washington State Bar Association. He has a B.A. from the University of Chicago and a J.D. from Washington University, St. Louis. David has been a lawyer for 14 years, mostly in private practice. After a 2004/2005 stint as a Disciplinary Counsel at the Washington State Bar Association, David began sharing duties with Professional Responsibility Counsel Christopher Sutton in 2007 and in 2008 David became the full-time Professional Responsibility Counsel for the WSBA. He is licensed in both Washington and Oregon.

**\*Rita Swanson** is the WSBA Audit Manager. Her main responsibilities include conducting "for cause" audits, overseeing the Association's random examinations, investigating grievances involving trust account violations, and educating lawyers and their staff as to the trust account rules and regulations. Rita is a Certified Public Accountant and prior to joining the Bar Association she was a manager in a local public accounting firm.

**Cheryl Heuett** is a Senior Auditor at the WSBA. She performs "for cause" audits and assists with random examinations and educates attorneys about the trust-account rules and regulations. She received her B.A. from Boise State University (1981) and her J.D. from the University of Idaho (1984). She was a staff accountant at the Bellevue CPA firm of Shimizu & Shimizu for five years prior to joining the auditing staff at WSBA in 2005.



**\*\*NOT ALL TOPICS AND SPEAKERS WILL BE PRESENTED AT EACH SEMINAR!\*\***

\*Denotes Speakers and Topics

Check	Sign up for:	Time	Price
<input type="checkbox"/>	<b>November 17, 2009</b>	<b>8:00</b>	<b>\$99.00</b>
	GuestHouse Inn & Suites (360-537-7460) 701 East Heron, <b>Aberdeen, WA</b>		
			Code: LOMOTR91709

“... and bring a staff person!”

<input type="checkbox"/>	<b>November 18, 2009</b>	<b>8:00</b>	<b>\$99.00</b>
	Clubhouse at McCormick Woods (360-895-0142) 5155 McCormick Woods Dr SW, <b>Port Orchard, WA</b>		
			Code: LOMOTR91809

Bar No. \_\_\_\_\_ Total: \_\_\_\_\_

Name \_\_\_\_\_

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Phone \_\_\_\_\_ Fax \_\_\_\_\_

#### Method of Payment

- Check Enclosed Payable to WSBA  
 Visa  
 MasterCard

**Please note:** No coupon or preferred passes accepted for this program. Seating is limited.

Credit Card # \_\_\_\_\_ Exp. date \_\_\_\_\_

Signature \_\_\_\_\_

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

See [www.lomap.org](http://www.lomap.org) for information about services available to members!