



The 2025 WSBA Solo and Small Firm Conference: Collaboration for Success

ORIGINAL PROGRAM DATES

November 7-8, 2025 & December 19, 2025

*Presented in collaboration with the
WSBA Solo and Small Practice Section*

REPORTING YOUR CREDIT

This on-demand program was a live seminar presented on November 7-8, 2025 & December 19, 2025. If you attended or viewed the original presentation, please note that WSBA members may not claim credit for the same CLE sessions if repeated within their three-year reporting period.

DESCRIPTION

Join us on-demand for the 20th annual Solo and Small Firm Conference! The theme this year is “Collaborating for Success.” Co-sponsored with the Solo & Small Practice Section, this program has been thoughtfully designed to include presentations by industry experts on a variety of topics to help you feel more confident and up-to-date in the management of your practice! Offering 13.75 total CLE credits, this terrific program provides valuable business-related tips.

AGENDA

1 **Bootcamp 2025: Starting a Solo/Small Firm**

In this session you will have the opportunity to:

- Consider whether solo practice is right for you.
- Gain clarity of your first steps to get going (including what hazards you may encounter!).
- Identify and respond to the fears that are holding you back from going solo.

Dean Alterman - Alterman Law Group PC, Portland, OR

Ann Guinn - G & P Associates, Kent, WA and Reno, NV

Mackenzie J Sorich - View Ridge Law, Seattle, WA

2 **From Hesitation to Confidence to Efficiency: AI for the Small Legal Office**

In this session, Lori Byland will introduce you to the world of AI and how it can enhance efficiency in your small legal office. You will gain foundational knowledge and practical tools that will empower you to start integrating AI into your everyday tasks. Discover how to streamline document drafting, conduct legal research more effectively, and enhance client communication, all while freeing up time to focus on what matters most. Lori will guide you through her RECS Framework, which is the key to building successful AI prompts. You will also leave with actionable steps to continue learning and growing your AI skills beyond the conference. This presentation is just the beginning of your AI journey.

Lori Byland - Executive Assistant & Trainer, Intel Corporation, Portland, OR

3 **The Ethics of Withdrawing from Representation**

Learn the ethical issues regarding withdrawal from representation, how to avoid common mistakes, and how to protect yourself and your client as you negotiate this termination of representation.

Sandra Schilling - Washington State Bar Association, Seattle, WA

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4 How to Find Your Community

For many solo and small firm attorneys, the practice of law can feel isolating, overwhelming, or competitive. Attorneys might realize that growing and sustaining a professional community is vital to their long-term success and well-being, but they also might not feel like they have the capacity to foster those relationships. This panel will examine mentoring and community-building from multiple vantage points—mentee, mentor, and peer—and offer strategies for creating networks of support that fuel professional and personal growth.

- Christopher Fargo-Masuda will provide a mentee's perspective, discussing the role of active observation in identifying potential mentors and the importance of contributing meaningfully to mentoring relationships.
- Stan Perkins will offer insights from the mentor's perspective and his time developing Seattle University School of Law's Incubator Program. He will address the variety of mentoring models (e.g., practice-specific, business development, and coaching) and the benefits of mentoring, including to mentors themselves—while dispelling myths about time commitments and seniority.
- Carrie Griffin Basas will explore nontraditional approaches to relationship-building and community, emphasizing the role of peer support and identity-based connections, including networks for attorneys with disabilities.

Christopher GM Fargo-Masuda Esq. - Fargo-Masuda P.C., Mercer Island, WA

Carrie Griffin Basas Esq. - Justice Studio, Seattle, WA

Dean Standish "Stan" Perkins - Dean Standish Perkins & Associates, P.S., Seattle, WA

5 Open Minded: Practicing Through a Culturally Humble Lens

A successful client attorney relationship isn't solely reliant on the outcome of the case. Forming a successful relationship is coupled with communication, building rapport, and self-awareness. Today's presentation will help you understand how to apply cultural humility in your practice of law allowing you to recognize the challenges, identify relationship building skills, and improve your communication.

Sunitha Anjilvel - Anjilvel Law Group, Redmond, WA

Adely Ruiz - Washington State Bar Association, Seattle, WA

Diana Singleton - Washington State Bar Association, Seattle, WA

6A How to Build a Book of Business

During this session, we'll cover a variety of cost-effective channels that have proved to be particularly effective for the small/solo practitioner as well as bar minimum technical infrastructure required to effectively manage marketing and intake efforts.

Conrad Saam - Mockingbird Marketing, Issaquah, WA

6B How to Navigate a Multi-jurisdictional Practice

At what point does representation require a state-specific license? What are the common pitfalls of multijurisdictional practice for litigators and transactional attorneys? How do you manage compliance with numerous bar organizations and state agencies? Join us for an overview of challenges commonly encountered in multi-jurisdictional practices.

Tyler O'Brien - The Longhair Lawyer, Ritzville, WA

Shea Meehan - Consult with Shea, PC, Portland, OR

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7A Tough Lawyers, Smart Strategies – Turning Tension into Triumph: Navigating Difficult Attorneys

Every lawyer has faced “that attorney” – the one who stonewalls, nitpicks, or thrives on conflict and confusion. Instead of letting difficult personalities derail your work, learn how to flip the script. This session will equip you with smart, practical strategies to stay calm, build resilience, and turn tension into opportunities. We'll uncover communication techniques, boundary-setting and problem-solving to help you remain effective – even when opposing counsel (and sometimes colleagues) are not. Through real-world examples and actionable tools, you'll learn how to manage conflict, protect your client's interest, and turn frustrating encounters into professional wins. Walk away with tools not to just survive tough lawyers, but to thrive in the challenge.

Rea Culwell – Moberg Law Group, P.S., Ephrata, WA

Mary Rathbone – Moberg Law Group, P.S., Ephrata, WA

7B Online Resources to Improve Client Service

This session explores practical online tools and platforms that solo and small firm lawyers can use to enhance client service—from streamlining communication and document sharing to improving accessibility and responsiveness. Attendees will leave with actionable resources to boost efficiency, strengthen client relationships, and stay competitive in a digital-first legal landscape.

Jordan Couch – Palace Law Offices, University Place, WA

Shreya Ley – LayRoots, Seattle, WA

8 High Stakes Ethical Challenges Faced by Lawyers

Two WSBA Managing Disciplinary Counsel discuss common ethical challenges that Solo and Small Firm practitioners may face. Learn the ethics rules for tricky situations and how to avoid others' mistakes.

Francesca D'Angelo – Washington State Bar Association, Seattle, WA

Erica Temple – Washington State Bar Association, Seattle, WA

9A Tips for Successful Mediations

This session will discuss concrete steps you can take both before a mediation (whether to mediate, timing of mediation, selecting a mediator, preparing your client, mediation submissions), and during a mediation (opening offers, negotiation strategies, division of responsibilities between you and your client) to ensure that you are maximizing your effectiveness as an advocate in the mediation process.

Dean Lum – JAMS, Seattle, WA

Sasha Philip – Philip Mediation, Kenmore, WA

9B Do You Have the Right People at the Table?

Representing your clients to the best of your ability can sometimes mean bringing in others to help. Collaborative law attorneys have long known the value of incorporating other experts into their work on behalf of clients; but, outside expertise can be helpful to other practice areas, as well, such as litigation, estate planning, PI, etc. So, who can help you win for your client? Learn how two seasoned attorneys determine who they need at the table, and identify how to find them.

Jordan Couch – Palace Law Offices, University Place, WA

Teanini Joanna Roth – Family Transition Center, Seattle, WA

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10A Getting More Out of the Tech You Already Use

Small adjustments to the tools you already use can make a surprising difference in efficiency and peace of mind. In this session, we'll explore simple ways to get more out of your existing technology, including practical automation ideas and hidden features that save time. The focus will be on realistic steps for solo and small firm lawyers—changes you can start using right away. Expect an interactive session with plenty of examples and leave with at least one tip you'll want to put into practice before you even get back to the office.

Margeaux Green - Washington State Bar Association, Seattle, WA

10B Personnel: You Hired Them, Now What?

A small firm does not have an HR Department, but it may have decades of unspoken tradition or just a way of doing things that are not obvious to newcomers. How do you convey knowledge, set expectations, and make this employee a productive, useful, and happy asset to a small firm? Technology, culture, and human leadership all have an important role to play in a successful and lasting onboarding, especially in an era with great generational culture differences. The Whatcom Law Group went from 4 people to 10 people in a short time period; Rajeev will share the helpful lessons learned and how success was achieved for his firm.

Rajeev Majumdar - Whatcom Law Group, P.S., Blaine, WA

11 Collaborating for Success: Judicial Insights for Solo and Small Firm Lawyers

Solo and small firm practices thrive on resourcefulness—but in today's legal environment, resourcefulness is best paired with collaboration. In this interactive session, three Washington judges will share practical strategies for how attorneys can work together—both with opposing counsel and with the courts—to resolve issues like discovery and scheduling disputes more efficiently, reduce client costs, and achieve better outcomes. Additionally, the discussion will focus on how recent developments in technology could facilitate a collaborative process between opposing counsel to resolve case related issues without involving the Court.

The judges will offer insights on what collaboration looks like from the bench, highlight examples of practices that reduce friction and wasted resources, and provide some “out of the box” ideas about how generative AI tools may assist solo and small practice lawyers avoid costly pretrial hearings and even settle cases.

Judge David G. Estudillo - The United States Court House, Tacoma, WA

Judge Christine Frausto - Tulalip Tribal Court, Tulalip, WA

Judge Christon Clark Skinner - Island County Superior Court, Coupeville, WA

12 Legal Ethics in 2025 and Beyond for Solo and Small-Practice Lawyers

This presentation will share current and forward-looking legal ethics updates for lawyers who practice in solo and small-practice contexts. Ethics and technology will be explored, with broader insight than warnings about AI hallucinations, including resource considerations, confidentiality, fees, communication, and competence. The role of bias and harassment in law practice also will be addressed, aligning important recent formal ethics opinions from the American Bar Association with lawyers' obligations under the Washington RPC. The presentation further will flag selected recent Washington Advisory Ethics Opinions that offer helpful insight for lawyers in solo and small-practice for maintaining an ethical law practice.

Professor Brooks Holland - Gonzaga University, School of Law, Spokane, WA