

Expanding Your Practice Using Limited Scope Representation 2018

San Francisco, Live Webcast and www.pli.edu,* January 25, 2018

Why You Should Attend

This program will provide an introduction to the rapidly changing practice of limited scope representation (often called “unbundling”) in a family law context, including all of the fee agreements, forms and other materials you will need to practice limited scope representation competently, safely and profitably.

What You Will Learn

- The ethical rules governing limited scope representation
- How to limit risk, including malpractice and insurance coverage issues
- How to identify the cases which lend themselves to limited scope representation
- How to reach a currently untapped pool of paying clients
- How to market your limited scope practice
- How to use limited scope to expand pro bono recruitment, lawyer for a day programs, and stretch legal services budgets farther

Who Should Attend

Solo and small firm family lawyers who serve middle class and moderate income clients, any family lawyer who wants to expand their client and referral base, and pro bono recruiters and legal services providers who want to learn how to help more clients with limited funding would benefit from attending this program.

Program Schedule

9:00

Program Overview and Introductions

M. Sue Talia

9:15

Limited Scope Representation: Ethical, Malpractice, and Insurance Issues

- Ethical rules governing limited scope representation (including ABA Model Rules, CA Rules of Professional Conduct and CA Rules of Court)
- Defining the attorney-client relationship in limited scope representation
- Common misconceptions leading to ethical issues
- Professional liability issues
- How limited scope representation influences an attorney's professional insurance coverage

M. Sue Talia

10:15

Risk Management: Your Ticket to a Good Night's Sleep

- In depth risk management
- Best practices
- Client selection and rejection
- Fee agreements and engagement letters
- Changes in the scope
- Terminating the limited scope relationship
- Practical applications
- Pitfalls and how to avoid them
- The role of the full service lawyer opposing a limited scope appointment

M. Sue Talia

11:15 Networking Break

11:30

National Trends: The Evolving Nature of the Practice of Law

- Overview of limited scope trends around the US and Canada
- Speaking to the stakeholders
 - Private practitioners
 - Judges
 - Court administrators
- Applications to specific situations
 - Private practice
 - Court-based programs

- Pro bono applications
- Marketing the limited scope practice
- Resources for practitioners

M. Sue Talia

12:30 Adjourn

Faculty:

Chair:

M. Sue Talia

Private Family Law Judge
Danville, California

Program Attorney: Christina Thompson