

TAGLaw Fall Conference

Chicago, Illinois
October 18- 20, 2007

Conference moderator: Peter Appleton Jones

Wednesday, October 17

12:30 – 2:00 Joint Advisory Board Lunch

2:00 – 5:00 TAGLaw Advisory Board Meeting (Cordova)

Thursday , October 18

8:00 a.m. TAGLaw Conference Registration

9:00 a.m. Early Bird Tour: See the City of Chicago.

6:30 TAGLaw Cocktail Party (Seville Ballroom Foyer)

7:30 Dinner (Seville Ballroom)
Welcome to Chicago - Barack Ferrazzano Kirschbaum & Nagelberg LLP; USA:Illinois

Friday, October 19

7:30 a.m. – 9:00

Breakfast – Guests Included (Ferris)

9:00

Tour for Guests – Meet in Lobby

8:45

Welcome (Seville Ballroom)

9:00

An International Comparison of the Judicial Role: A Mock Oral Argument and Panel Discussion

Moderator: Daniel Polsenberg; Beckley Singleton; USA: Nevada

The program will involve a mock Supreme Court argument based on the case of *Dimick v. Republican Party of Minnesota*, in which the United States Supreme Court denied certiorari last year, leaving uncertain the constitutionality of judicial ethics laws restricting the free speech rights of candidates for judicial office. In *Dimick*, the Supreme Court declined to review an en banc Eighth Circuit decision striking as unconstitutional two provisions of the Minnesota Supreme Court's Canons of Judicial Conduct. The Eighth Circuit decision invalidated restrictions on judicial campaigns that have been adopted by approximately 30 states and that remain part of the ABA's Model Canons of Judicial Conduct. As a result, judicial candidates in many states are left uncertain as to permissible campaign behavior, and attorneys charged with crafting ethics codes are left with conflicting guidance. The mock Supreme Court argument will focus on this conflict between the need for judicial ethics codes that protect public confidence in the impartiality of the courts and the rights of judicial candidates to free speech and association. After the attorneys present their mock arguments, the panel of judges will be invited to offer their perspectives on the arguments and comment as to what the court's decision should address. Following the judges' commentary, we will also solicit the network's international perspectives on the presentation.

Presenting Oral Arguments

Jon Laramore; Baker and Daniels, LLP; USA: Indiana

TBD

Justices

Professor Michael Seng of John Marshall Law School

Justice Robert Cahill of the Illinois Court of Appeals

Judge Robert D McLaren of the Illinois District Court

10:30

NEW INITIATIVES

I. **TAG Advisors Bureau** – A New Resource for Members: The Advisors Bureau is a carefully selected group of consultants recommended by our members to help firms improve the effectiveness of their operations.

II. **TAG Property Group** – The TAG Property Group is a proposed outgrowth from the TAGLaw Real Estate Specialty Group. The two co-chairs will share their dynamic proposal for building a cross-border capability for firms with clients involved in significant real estate transactions. This evolution in Specialty Groups would increase the capability of the networks to pursue and win new business.

Co-chairs: Karen Mason; Boodle Hatfield; England

David A. Rutter; Boulton Cummings Connors Berry; USA: Tennessee

11:00

Break

11:30

PARALLEL SESSIONS

Client Feedback Programs: Tips, Tools and Tactics for Client Service (Seville East)

Laura Meherg, Founder, Meherg Consulting

Firms willing to invest time and resources in an effective client feedback program have a powerful tool for demonstrating their commitment to client service and delivering it. Ongoing client service reviews help firms protect important client relationships, prevent client erosion and identify opportunities. This session will review, among other important steps: Identifying and prioritizing clients to interview, Pre-interview preparation and research, Developing interview questions, and creating actionable follow-up strategies.

-OR-

What Keeps a Managing Partner Awake at Night (Seville West)

John Remsen, Founder & President, TheRemsenGroup

In 2006, The Remsen Group surveyed managing partners to find out what was on their minds. Improving profits, initiating change and building consensus are the most challenging issues they face. Among other items, this session will discuss the characteristics of today's most successful law firms, how managing partners spend their time and the most pressing issues they face, what they say is their most important role and why managing partners need a clearly understood job description and succession plan.

12:00

PARALLEL SESSIONS

Elements of a Personal Business Development Plan (Seville East)

Larry Bodine, Business Development Advisor, Larry Bodine Marketing

Learn what the rainmakers know about getting new business. The secrets include the priority of prospects to focus on, avoiding the primary business development mistakes, listening your way to new business and "selling" like a business doctor. You will also learn how to: Focus on your ideal prospective clients; Define your personal value proposition for these ideal target clients; Market to your best existing clients; Turn your clients into your sales force; Market yourself inside your own firm; Co-market with high power professional allies; Build your network with a purpose; Build your professional reputation

-OR-

Law Firm Mergers and Acquisitions: Strategic Considerations (Seville West)

John Smock, Partner & Co-Founder, Smock•Sterling Strategic Management Consultants

Some have predicted that the legal profession is bound to consolidate globally to a level already witnessed in the public accounting profession. While, Smock Sterling believes that is a dubious proposition, we do recognize a number of strategic reasons for law firms to grow through merger and acquisition. This session covers the strategic considerations driving law firm combinations and what the principle barriers are to successful law firm mergers and acquisitions as well as means for addressing and overcoming those barriers.

-OR-

Websites: From None to One, and from One to One-Up (Adler)

Girish Altekari, President, DeepCoolClear

Specially designed for firms with no website (none to one), and for firms with a stale website (one to one up), this session will outline how firms can simply and inexpensively create a professional web presence. Girish Altekari will pull from his many years of experience to help firms who have only a "beginner's" experience on the web.

12:30

PARALLEL SESSIONS

Confronting the Under-Productive Partner Issue (Seville East)

Peter Giuliani, Partner, Smock•Sterling Strategic Management Consultants

This session will address one of the most difficult management issues facing law firms – what to do when a partner's productivity or behavior slips. Including: How to identify the issues contributing to an erosion in productivity; Proven methods for turning around performance or retooling the practice of highly capable partners; Best practices associated with managing practice succession and working with partners who are moving toward retirement; "Do's and Don'ts" related to compensation, outplacement and de-equitization

-OR-

Creating Powerful Marketing Materials: Peter Appleton Jones interviews Paula Black to Learn Top Firms' Marketing Secrets (Seville West)

Paula Black, Founder & President, Paula Black and Associates

Learn the essential elements of results-driven marketing pieces. Come to terms with the importance of branding and why it's essential to grow your client base. Learn how to establish your firm's voice and messaging and convey it effectively. Paula Black (the author of *The Little Black Book on Law Firm Branding & Positioning*) will provide expert commentary on these topics and more.

1:00

LUNCH

2:30

FIRST WAVE SPECIALTY GROUPS

Competition & Antitrust (Adler)

Co-chairs: Cees Dekker; Nysingh advocaten – notarissen; Netherlands

1. Potential impact of China's first antitrust law on doing business with Chinese companies;
2. Do's and don'ts in applying for leniency. Participants will share their experience with national leniency policies (leniency systems, risks of asking for leniency, etc.). We will discuss initiatives such as making manuals on: multi-jurisdictional merger filings, multi-jurisdictional antitrust investigations and a digital global antitrust and competition review.

Employment & Labor Law (Onyx)

Co-chairs: Michael Sippitt; Clarkslegal; England

Larry Drapkin; Mitchell, Silberberg & Knupp; USA: California

This session will feature a discussion of electronic technology issues impacting the workplace. Topics will include privacy rights, monitoring, discovery implications, document retention issues, improper personal uses, union implications and other concerns arising from the use of electronic technologies in the workplace.

Investment Management (Hebron)

Co-chairs: Patrick Sweeney; Herrick, Feinstein; USA: New York

David Williams; LK Shields; Ireland

The agenda will consist of an organized group discussion of legal and product trends over the past twelve months and will include: (i) the new SEC anti-fraud rule for private fund advisers and its implications for enforcement actions; (ii) current developments in the credit markets and the impact on credit-based investment products; (iii) the new SEC proposal for revised criteria for accredited investors, and its potential impact on hedge funds and other private investment fund offerings.

Intellectual Property, Life Sciences and Litigation (Joint Session) (Seville East)

The TAGLaw Approach to Emergency Relief for IP Infringement around the Globe

IP & IT Co-chairs: Gábor Germus; S. B. G. & K. Patent & Law Office; Hungary
Mark S. Thomas; Williams Mullen; USA North Carolina

Litigation & ADR Co-chairs: Jonathan Lloyd-Jones; Blake Laphorn Linnell; England
Alex Lever; Nysingh advocaten – notarissen; Netherlands

Life Sciences Co-chairs: Barbara Rummel; Lindquist & Vennum; USA: Minnesota
Simon Smith; Blake Laphorn Linnell; UK

Moderator: Simon Smith; Blake Laphorn Tarlo Lyons; England

TAGLaw members will work together to assist a life sciences company client which seeks preliminary injunctions around the globe on an urgent basis to protect its valuable patents and trademarks from a ruthless infringer.

Panel Members:

Eric Laevens, Marx Van Ranst Vermeersch & Partners; Belgium

Gabor Germus; S.B.G. & K. Patent and Law Offices; Hungary

Shino Uenuma; South Toranomon Law Offices; Japan

Mark Privatsky, Lindquist & Vennum PLLP; USA: Minnesota

Real Estate (Seville West)

Co-chairs: Karen Mason; Boodle Hatfield; England

David A. Rutter; Boulton Cummings Connors Berry; USA: Tennessee

This session will introduce The TAG Property Group and focus on its collaborative marketing initiatives. The Co-Chairs and Larry Bodine, a TAG Advisor and business development consultant, will lead a discussion about the group's strategic plan and business development strategies for "cross selling" the TAG Property Group to existing clients as well as among other members of the TAGLaw and TIAG networks. The discussion will serve as a kick off for the TAG Property Group's marketing and business development initiatives to further cement a global network of real estate lawyers and accountants. All attendees of the conference are welcome for this specialty group session. Real estate, tax, environmental and corporate professionals from both the TAGLaw and TIAG networks are particularly encouraged to attend.

3:30

Break

4:00

SECOND WAVE SPECIALTY GROUPS

Construction (Hebron)

Co-chairs: Patrick Mead; Carter Newell; Australia
David Rintoul; Clarkslegal; England

The group will discuss goals for the Specialty Group (e.g. knowledge sharing or referral opportunities) and ways to promote construction expertise of individual TAGLaw firms.

- *Identification of clients with off shore activities
- *Risk Allocation in Major Projects
- *Insurance issues in Major Projects

Corporate Law and M&A (Seville East)

Co-chairs: Alexander Lourie; Barack Ferrazzano Kirschbaum
Perlman & Nagelberg; USA: Illinois
Enrique A. Gonzalez Calvillo; Gonzalez Calvillo; Mexico
Bernhard Welten ; Hodler & Emmenegger ; Switzerland

Current Trends in Private Equity: Join John Beauclair, Principal of Sun Capital Partners, and Doug Jackson, Senior Vice President of Lehman Brothers, Inc. for an informal discussion regarding current trends in the world of private equity.

Environmental Law (Adler)

Co-chairs: Simon Thorne; Clarkslegal LLP; England
Randy Lutz; Hodes, Pessin & Katz; USA: Maryland

Clarkslegal is very involved in advising project developers in undertaking greenhouse gas emission reduction projects around the world which qualify for trading certificates under the Kyoto protocol. This is an opportunity to work closely with TAGLaw and TIAG firms – Clarkslegal is already working with members in China, Indonesia, Philippines, Cameroon, Nigeria, India etc. The networks have been of considerable benefit in respect of this initiative and play an important role in the future. To be discussed:

- * Introduction to the Kyoto Protocol and carbon markets
- * The Clean Development Mechanism – risks and good practice
- * Joint Implementation – opportunities emerging
- * Emerging carbon markets
- * Regional emissions markets in the US (contribution from Chicago Climate Exchange)
- * Case study and opportunities for TAGLaw and TIAG firms to work together

Insolvency and Secured Transactions (Onyx)

Co-chairs: Deborah S. Grieve; Blaney McMurtry; Canada: Ontario
Robert Sattin; Reid and Riege; USA: Connecticut

The Insolvency Group will discuss a variety of topical issues such as: the impact of the tightening credit market on business and its impact on the bankruptcy and insolvency practice area; how to deal with clients who don't appreciate the severity of their financial distress and its implications; recent law on who is an insider and how to protect key employees; and how to decide whether a client is best served by a formal proceeding or by out-of-court negotiation or liquidation.

Real Estate (Seville West)

Co-chairs: Karen Mason; Boodle Hatfield; England
David A. Rutter; Boulton Cummings Connors Berry; USA: Tennessee

To further build on the Real Estate Specialty Group's initiatives, this will be a networking session where attendees will gain a better understanding of their colleague's capabilities as they relate to Real Estate.

5:00

Close

6:30

GALA – Meet in the lobby to leave for the Art Institute of Chicago which hosts a collection encompassing more than 5,000 years of human expression from cultures around the world. Dinner will be in the reconstructed Chicago Stock Exchange Trading Room.

Saturday, October 20

7:30 a.m. – 9:00 Breakfast – Guests Included

9:00 Tours for Guests:

8:45 Welcome

9:00 How General Counsel Selects Outside Counsel (Seville Ballroom)

Paul Beach, Associate General Counsel, United Technologies Corporation

Paul Beach is an associate general counsel for United Technologies Corporation (UTC) and is in charge of the hiring and management of outside counsel all over the world for UTC and its subsidiaries. UTC has 4,000 locations in 62 countries with 215,000 employees – making the company the 47th largest employer in the world. This presentation will be one of the best you will ever hear from someone on the “inside” about hiring outside counsel.

10:00 TAG ACADEMY: THE DAWN OF A NEW ERA FOR TAGLAW

I. TAG Academy Presentation & Announcement

The benefits of TAG Academy include:

- Expanding Broad Professional and Business Education for Members
- Promoting Member Firms within TAGLaw and to Corporations Worldwide
- Impressing Existing Clients with TAGLaw Members

II. Members in breakout groups will review 80 course suggestions and help design the 2008 Course Schedule. The group session will identify potential faculty from among member firms

11:00 Break

11:30 Great Minds Focus Groups

Several TAGLaw conferences have passed since the last “Networking Roundtables” session. Networking Roundtables, always a favorite session, makes a comeback in Chicago but this time with a twist. Rather than grouping tables by geography or length of time in network, we are encouraging members to gather to a table with members who have some of the same topics on their minds. Tables will be set for the following topics:

Associate Compensation

Branding

Client Feedback Programs

Marketing/Client Development

Mergers & Acquisitions

Practice Group Management

Risk Management

Succession Planning

We have observed that members like to learn much from each other in an informal setting and think this method of idea sharing could be effective. Some tables will be moderated by TAG-AB members to help provide additional perspective.

12:15 Great Minds Focus Groups (continued)

Rotate and meet great new minds and learn new ideas.

1:00 TAGLaw Advisory Board Report

1:30 Lunch

3:00 Networking Tour

A tour will be arranged for members to the magnificent Bahai House of Worship in north suburban Wilmette. Built in 1929, it is the only Persian house of worship in North America.

6:30 Optional Dinner at Brazzaz

Brazzaz provides the unforgettable experience of a Brazilian Steakhouse - a tradition with roots back to the prairies of southern Brazil in the 18th century.

Tours

THURSDAY, OCTOBER 18

The City of Chicago – Early Bird Tour for Members & Guests

Sample the City of Big Shoulders for a trip that will take you from the impressive downtown to nearby neighborhoods, through picturesque parks, and past the architectural palaces of Chicago. The tour includes both walking and easy viewing from a motor coach.



Listen to anecdotes as you proceed through historic Dearborn Street and its famed public art by Calder, Picasso, Miro and Chagall. While in the Loop area you will also see Old City Hall, the magnificent State of Illinois Building by Helmut Jahn, the commanding Board of Trade building at the base of Chicago's "Financial Canyon," and the vibrant new theater district off of State Street. You will also walk through Grant Park and the nearby Museum Campus, home to the Field Museum, Shedd Aquarium and Adler Planetarium. You may want to bring your cameras because the photo opportunity from Planetarium Point looking north toward the skyline is one you will not want to miss. Additional tour highlights include: North Michigan Avenue (The Magnificent Mile) – High-class shopping and swank boutiques mark this stretch of Chicago from the Chicago River to the Old Water Tower. Bloomingdales, Tiffany, Water Tower Place, Chicago Place, Nike Town, are just a few of the fine shopping sites. Close to the river are two of the city's most endearing landmarks – the Wrigley Building and the Tribune Tower. Members and their guests will return to the hotel prior to lunch.

Price for Members & Guests (lunch is not included): \$76

Attire: Casual and comfortable walking shoes

Time: 9:00 am - 12:30 pm

FRIDAY, OCTOBER 19

Cantigny Park – Day Tour for Guests

This tour features the magnificent Cantigny Gardens, McCormick Museum and First Division Museum. Cantigny was the home and estate of the late Colonel Robert McCormick, owner and publisher of the Chicago Tribune. This magnificent 500-acre park was named after the World War I Battle of Cantigny, in which Col. McCormick fought. It consists of formal and "idea" gardens, the McCormick Mansion and a museum paying tribute to the American Army's famous First Division (The Big Red One).

In 1967, to create the Formal Gardens, the board of trustees overseeing the Cantigny Estate, hired one of the country's foremost landscape architects, Franz Lipp. They charged him with the task of building an important American garden. Attendees are welcome to walk through the 40-acre masterpiece. For the Idea Garden, landscape architects envisioned it to be a "thought pool" for home gardeners to fish from. As they walk through the Cantigny seasons of plantings, they will likely find just the plant or accent that would fill the void in their own landscape. The Robert R. McCormick Museum is a historic mansion museum that depicts the country home of a family that made the Chicago Tribune the "World's Greatest Newspaper." Priceless family heirlooms, Chinese and European works of art, and over 400 year-old antiques grace the 27 rooms that are on display.



Tours Continued

Cantigny Park continued

After that historical adventure, guests will enjoy a lunch buffet at the Cantigny Golf Course.

For more information about Cantigny Park, visit www.cantigny.org.

Price for Guests (lunch included): \$132

Attire: Casual and comfortable walking shoes

Time: 9:00 am - 3:00 pm

SATURDAY, OCTOBER 20

Baha'i House of Worship, Historic Long Grove and the North Shore – Day Tour for Guests

En route to Long Grove, we will make a stop at the Baha'i House of Worship in north suburban Wilmette. Built in 1929, it is the only Persian house of worship in North America. The number nine, the symbol of perfection and unity, recurs throughout the structure: nine doors welcoming all people from all directions, a nine sided 135-foot dome, and nine sculptured gardens.



As we travel north to historic Long Grove, settled in the early 1800's by a group of German farmers, this tour will evoke a trip back in time. The village went into a sleepy decline in the 1920's and 1930's and the quaint buildings remained untouched by progress until the 1940's when several village women opened a pair of antique resale shops. There are now 120 specialty shops throughout the village.

Before returning to the hotel, enjoy a buffet lunch at Seasons Restaurant in Long Grove.

For more information about Long Grove, visit www.longgroveonline.com.

For more information about the Baha'i House of Worship, visit www.bahai.us/bahai-temple.

Price for Guests (lunch included): \$118

Attire: Casual and comfortable walking shoes

Time: 9:00 am - 3:00 pm

SATURDAY, OCTOBER 20

Baha'i House of Worship - Afternoon Networking Tour for Members



Baha'i House of Worship in north suburban Wilmette. Built in 1929, it is the only Persian house of worship in North America. The number nine, the symbol of perfection and unity, recurs throughout the structure: nine doors welcoming all people from all directions, a nine sided 135-foot dome, and nine sculptured gardens.

For more information about the Baha'i House of Worship, visit www.bahai.us/bahai-temple.

Price for Members and Guests: no charge

Attire: Business casual or casual

Time: 3:00 pm - 5:30 pm

Evening Events

THURSDAY, OCTOBER 18

**Cocktail Party and Welcome Dinner –
for Members & Guests**

Now that everyone has arrived in Illinois's Windy City, it's time to commence the Chicago Conference – kick-off the weekend with cocktails and enjoy a buffet dinner with old and new friends. This night will build momentum for the days to come.



Price for Guests: \$177

Dress: Men – Business or business casual; Women – Business, business casual or cocktail attire.

Time: Cocktails - 6:30 pm Hotel's Seville Foyer

Dinner - 7:30 pm Seville Ballroom

FRIDAY, OCTOBER 19

**Gala Dinner at The Art Institute of Chicago – for
Members & Guests**

The Art Institute of Chicago, founded in 1879 as both a museum and school, first stood on the southwest corner of State and Monroe Streets. It opened on its present site at Michigan Avenue and Adams Street in 1893. Built on rubble from the 1871 Chicago fire, the museum housed a collection of plaster casts and had a visionary purpose: to acquire and exhibit art of all kinds and to conduct programs of education. The collection now encompasses more than 5,000 years of human expression from cultures around the world, and the school's graduate



program is continually ranked as one of the best in the country. Notably, the museum is most famous for its collections of Impressionist, Post-Impressionist, and American paintings. During the Cocktail hour, Members and Guests will be taken on short tours of the remarkable Museum.

This evening's dinner will be held in the Chicago Stock Exchange Trading Room. Louis Sullivan designed the original Chicago Stock Exchange, built in 1893–94. When the Stock Exchange was demolished in 1972, sections of Sullivan's elaborate stenciled decorations, molded plaster capitals, and art glass were preserved from the Trading Room, the magnificent centerpiece of this 13-story structure. Using these fragments, the Art Institute was able to reconstruct the Trading Room in its new wing in 1976–77.

For more information about The Art Institute of Chicago, visit www.artic.edu.

Price for Guests – \$237

Dress – Business Suit, Cocktail Attire

Time: Meet in the hotel lobby at 6:30 pm

Evening Events Continued

SATURDAY, OCTOBER 20

Optional Dinner at Brazzaz – for Members & Guests

The Brazilian churrascaria tradition began on the prairies of southern Brazil in the 18th century when gauchos tended vast herds of cattle. For meals, they roasted skewered cuts of seasoned beef over a fire pit. Over time, their menu expanded to include chicken, lamb, sausages and other meats. Eventually, this custom spread to Brazilian cities, where churrascaria are prevalent today.

Brazzaz is intended to appeal to a broad range of people, including those who may not eat a lot of red meat, the creators have included a lavish salad bar with many cold vegetarian and seafood items, plus a hot fish dish, that guests may order without taking in the full skewered meats experience. Meats include New York strip steak, beef tenderloin, filet mignon wrapped in bacon, leg of lamb, pork tenderloin, beef and pork ribs, chicken and Brazilian pork sausage.



For more information about Brazzaz, visit www.brazzaz.com.

Price for Guests – \$114

Dress – Casual

Time: Meet in the hotel lobby at 6:30 pm