

# BOSTON

SPRING INTERNATIONAL CONFERENCE

May 6-8, 2013

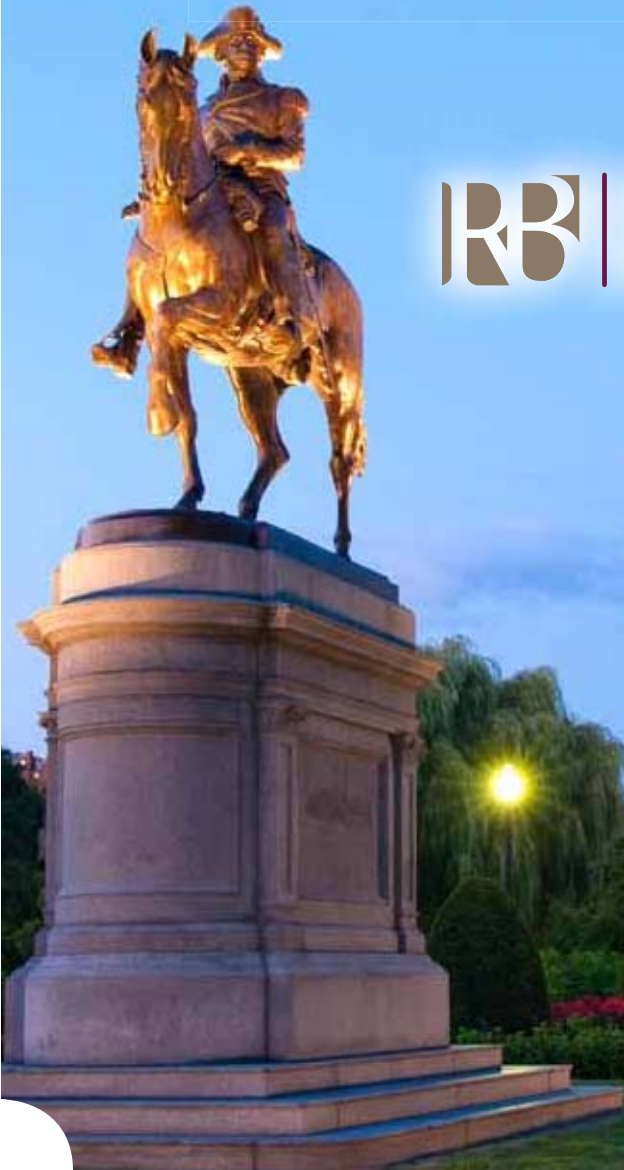


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**Location:** Georgetown Law in Washington D.C.

**Registration Price:** \$1195\*

Learn more at [Leadership.TAGLaw.com](http://Leadership.TAGLaw.com).

## FUTURE LEADERS



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# WELCOME TO BOSTON!



Dear TAGLaw® and TIAG® Members:

Welcome to Boston, one of the oldest cities in the country and historically the site of many of the most significant events in the founding of the United States. Internationally, Boston is known as an center of higher education and medicine. Locally, it is known as a city of neighborhoods. Its history, its institutions and its neighborhoods are all worthy of your attention. We are delighted to have you and your colleagues join us in such a historic and important American city.



The Boston area has historical significance for The Appleton Group as well. It was in an attic space in Gloucester, just 31 miles (50km) from Boston, that TAGLaw started in 1998. It is a source of great pride for all of us, as it should be for all who read this, to see both TIAG and TAGLaw now ranked among the top alliances in the world.

We extend special thanks to our host firms and principal sponsors, Samet & Company from TIAG and Riemer & Braunstein from TAGLaw.

Thanks are due as well to our associate sponsors from TAGLaw, Reid and Riege (Connecticut), Eaton, Peabody (Maine), and Little Bulman Medeiros & Whitney, PC (Rhode Island) and our associate sponsors from TIAG, Fazio, Mannuzza, Roche, Tankel, LaPilusa (New Jersey) and Cornick, Garber & Sandler (New York).

Our semi-annual international conferences are significant events for us and for all of you. They are forums for learning and for networking and for enjoying the company of friends. Our TAG staff works hard to make them as meaningful and memorable as possible and I add my personal thanks to all of them for the work they have done and will do to make this a special experience for you in Boston.

We look forward to seeing you.

Robert U. Sattin  
President  
The Appleton Group, Inc.

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Download session notes and materials at:  
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# AGENDA



## SUNDAY, MAY 5 (Advisory Board Meeting Schedule)

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- 9:00 a.m. - 9:30 a.m.      TIAG Board Breakfast (*Newbury Room*)
- 9:30 a.m. - 11:30 a.m.    TIAG Board Meeting (*Newbury Room*)
- 12:00 p.m. - 2:30 p.m.    TAGLaw and TIAG Joint Board Meeting and Lunch (*Commonwealth Room*)
- 2:30 p.m. - 4:30 p.m.      TAGLaw Board Meeting (*Newbury Room*)

## MONDAY, MAY 6 (TAGLaw & TIAG)

---

- 7:00 a.m. - 10:00 a.m.    Conference Registration (*2nd Floor Lobby*)
- 9:15 a.m. - 4:30 p.m.    Early Bird Tour: The Best of Beantown: A City Highlights Tour & Lunch  
(*Depart the hotel lobby at 9:15 a.m. to depart by coach and return at 4:30 p.m.*)  
(See page 36 for complete tour information.)
- 4:30 p.m. - 6:30 p.m.    Conference Registration (*Gallery Lobby*)
- 6:30 p.m.                TIAG Cocktail Party & Welcome Dinner (*Cocktails: The Lounge; Dinner: Main Dining Room*)
- 6:45 p.m.                TAGLaw Cocktail Party & Welcome Dinner (*Cocktails & Dinner: The Roof*)
- Now that everyone has arrived in Boston, it is time to kick off the week with cocktails and enjoy a wonderful dinner with old and new friends. Cocktails and hors d'oeuvres will be served followed by dinner.

## TUESDAY, MAY 7 (TAGLaw)

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- 9:05 a.m. - 9:15 a.m.    Welcome (*Grand Ballroom*)  
A welcome to Boston from Bob Sattin, President of The Appleton Group, Inc.
- 9:30 a.m. - 5:30 p.m.    Guest Tour: Full-Day Tour of The Coast: Salem, Gloucester and Rockport (*Meet in the hotel lobby at 9:30 a.m. to depart by coach and return at 5:30 p.m.*)  
(See page 36 for complete tour information.)
- 9:15 a.m. - 10:30 a.m.    The View from Inside: General Counsel Speak Their Minds about Working with Outside Law Firms (*Grand Ballroom*)  
Moderator: Jane Owens, The Weson Group  
Panelists:
  - Charles ("Charlie") Gray; Vice President, General Counsel & Secretary; Teradyne, Inc.
  - Danette Wineberg; Adjunct Professor; University of New Hampshire School of Law
  - Gail Mann; Chief Legal Officer & Secretary; Forrester Research, Inc.
  - Krish Gupta; Senior Vice President & Deputy General Counsel of EMC Corporation
  - Scott N. Semel; Executive Vice President, General Counsel & Corporate Secretary; IntraLinks Holdings, Inc.This panel will provide a candid, informal discussion among general counsel from several industries, sharing observations on what it takes for law firms to win their business, and then, to keep it. Panelists will recount some of the worst faux pas in law firm marketing efforts, reveal their Top 10 lists of Must Haves when it comes to client service and, generally, outline the qualities required for beginning and building lasting relationships with GCs and their companies.
- 10:30 a.m. - 11:00 a.m.    Networking Break (*Upper Foyer*)

11:00 a.m. - 12:00 p.m.

## Legal Technology Panel/Q&A (*Grand Ballroom*)

Moderators: Michael Kraft, CEO, Kraft Kennedy and Marcus Bluestein, Kraft Kennedy

Panelists:

- Cristián Fabres; Guerrero, Olivos, Novoa y Errázuriz (Chile)
- Michael Penman; Blaney McMurtry LLP (Ontario, Canada)
- Jean-Christophe Beaury; Racine (Paris, France)
- Robert Mulé; Reid and Riege, P.C. (Connecticut, USA)

Did you ever wish you could work better, faster, more efficiently or more effectively? Is there anything that bothers you about how your office technology serves these wishes? Any pet peeves about office technology? Write them down, or, better yet, make a note on your mobile device and you'll be prepared to participate in this session. Michael Kraft and Marcus Bluestein, along with a panel of TAGLaw members, will discuss, in layman's language, law firm technology issues and solutions to make your life better. Designed for lawyers, not IT professionals.

12:00 p.m. - 1:30 p.m.

## Lunch (*Main Dining Room*)

1:30 p.m. - 2:30 p.m.

## Legal Project Management: A New Model for Enhancing Profitability & Competitive Edge (*Grand Ballroom*)

Susan Lambreth, Law Vision Group, LLC

A few years ago, a matter was deemed successful if you were able to win a case for your client. The more hours were billed, the more money was made. Today, handling a successful matter is a balancing act of predictable pricing, a satisfactory outcome for the client and a profitable bottom line for the law firm. Join this session to practice some of the basic approaches to legal project management (LPM) to discover greater profitability and efficiency in the delivery of your firm's legal services.

Objectives:

- Identify what LPM is and how it could be used in your firm.
- Determine how leading law firms are embracing LPM to operate more effectively.
- Examine how LPM can help you develop skills to gather valuable data and improve processes over time.

2:30 p.m. - 3:00 p.m.

## Networking Break (*Upper Foyer*)

3:00 p.m. - 4:15p.m.

## Specialty Group Sessions (*Groups open to TAGLaw & TIAG members.*)

### **Corporate and M&A** (*Grand Ballroom*)

**Topic:** Current trends in Indemnification Provisions in M&A Transactions.

**Co-Chairs:**

- Anthony Adler; Mitchell Silberberg & Knupp LLP (Los Angeles, California, USA)
- Bernhard Welten; Hodler Rechtsanwälte (Berne, Switzerland)
- Enrique A. Gonzalez Calvillo; González Calvillo, S.C. (Mexico)

### **IP/IT & Life Sciences** (*Joint Session*) (*Newburg Room*)

**Topic:** Domain Names & Trademarks: UDRP Fundamentals in the Context of Real-World Cases: This session covers the rules, procedures, and practical considerations governing actions under the Uniform Domain Name Dispute Resolution Policy (UDRP) involving trademark infringement and Internet domain names. The session will be led by Christopher Smith of Lindquist & Vennum and other members of the IP/IT and Life Sciences specialty groups.

**Presenter:** Christopher Smith; Lindquist & Vennum PLLP (Colorado, Minneapolis & South Dakota, USA)

**Co-Chairs:**

- IP/IT: Mark Thomas; Williams Mullen (North Carolina & Virginia, USA)
- IP/IT: Gábor Germus; Germus and Partners (Hungary)
- Life Sciences: Barbara Rummel; Lindquist & Vennum PLLP (Colorado & Minnesota, USA)
- Life Sciences: Paul Tauber; Coblenz, Patch, Duffy & Bass LLP (San Francisco, California, USA)

## **Litigation & ADR** (*Taj Room*)

**Topic:** Brainstorming ideas on marketing collectively.

### **Co-Chairs:**

- Litigation & ADR: Alex Lever; Nysingh advocaten-notarissen N.V. (Apeldoorn, Netherlands)
- Litigation & ADR: Michael Penman; Blaney McMurtry LLP (Ontario, Canada)
- Litigation & ADR: R. Willis Orton; Kirton & McConkie, PC (Utah, USA)

## **TAG Tax** (**TAGLaw & TIAG Members**) (*Petite Ballroom*)

**Topic:** Tax in the Cloud: A consideration of the particular tax issues arising from doing business with cloud computing.

**Presenter:** Gregory Bryant; Williams Mullen (North Carolina & Virginia, USA)

### **Co-Chairs:**

- Conrad Garcia; Williams Mullen (Richmond, Virginia, USA - TAGLaw)
- Pascal Schultze; GGV Grützmacher / Gravert / Viegner (Paris, France - TAGLaw)
- Lisa Spearman; Mercer & Hole (London, England - TIAG)
- Oksana Hoey; Murray, Jonson, White & Associates, Ltd., PC (Virginia, USA - TIAG)

4:15 p.m. - 5:00 p.m.

## **Advisory Board Report** (*Grand Ballroom*)

The TAGLaw Advisory Board reports on the state of the network and new initiatives and responds to your questions.

**Special Report:** Benchmarking TAGLaw Firms

**Presenter:** Lisa Rohrer, PhD, Georgetown University Law Center

In this session, Dr. Lisa Rohrer of Georgetown University Law Center will review the results of the survey Georgetown recently conducted of TAGLaw firms and highlight the challenges and opportunities facing our members in the current legal landscape. Dr. Rohrer is a member of the faculty for the TAG Academy Future Leaders Course and is the Director of Executive Education and Research Fellow at Georgetown Law Center in Washington, D.C. She was also the coordinator and lead designer of the recent TAGLaw survey.

5:00 p.m.

## **Close** (*Grand Ballroom*)

6:15 p.m.

## **A Presidential Evening: Gala Dinner at the JFK Library** (*Depart the hotel lobby at 6:15 p.m. to depart by coach and return at 10:30 p.m.*)

Tonight, you will enjoy a truly presidential evening! This unique experience will take place at the John F. Kennedy Library and Museum located on Dorchester Bay and affording panoramic views of the Boston skyline. Standing as a vibrant tribute to the life and times of the 35th President of the United States, the I.M. Pei-designed building serves as both a wonderful museum and a leading research center for the study of mid-20th century American political and cultural life.

Upon arrival at the JFK Library, travel through the museum attached to the National Archives. You will relive the 1960 campaign for the Oval Office and get a rare inside view of JFK's White House years. Leaving the exhibits, you will be greeted in the Pavilion, where you can enjoy the view from the 80-foot glass wall that looks out over the harbor and the Boston skyline, while drinks and hors d'oeuvres are served before being invited upstairs to Smith Hall for dinner.

As a crescendo to the evening, you will enjoy a performance by the famous Harvard Krokodiloes, Harvard University's oldest and most prestigious a cappella singing group. The "Kroks" will perform popular American hits from the eras of the 1920s, 30s, 40s and 50s.

*Dress: Cocktail attire*

## TUESDAY, MAY 7 (TIAG)

---

- 8:45 a.m. - 9:00 a.m.      **Welcome** (*Petite Ballroom*)  
A welcome to the conference from Bob Sattin, President of The Appleton Group, Inc.
- 9:00 a.m. - 10:00 a.m.      **Building Your Firm's Online Reputation** (*Petite Ballroom*)  
Roy Keely, xCentric  
The days of top down messaging are over with the emergence of Internet and the advent of social media. It has never been more important to start making the shift to a personal brand and getting away from brochure-based branding that many professional service firms are guilty of. This session seeks to give practical guidance regarding your firm's online reputation and how to start building a brand fit for today's marketplace.
- 9:30 a.m. - 5:30 p.m.      **Guest Tour: Full-Day Tour of The Coast: Salem, Gloucester and Rockport** (*Meet in the hotel lobby at 9:30 a.m. to depart by coach and return at 5:30 p.m.*)  
(See page 36 for complete tour information.)
- 10:00 a.m. - 10:30 a.m.      **Networking Break** (*Upper Foyer*)
- 10:30 a.m. - 11:30 p.m.      **The Accounting Profession 2025** (*Petite Ballroom*)  
Jim Metzler, AICPA, Vice President of Small Business Interests  
In an effort to anticipate and plan for the future, the AICPA has gathered insights from accountants, business owners, regulators and futurists and has assembled them in the Horizons 2025 Report. This forward-looking session will highlight the driving forces that will re-invent firms as well as their clients. Jim will blend the output and analysis from the AICPA Horizons 2025 Initiative with his practical insight into what firms can be doing today to harness the many opportunities that will unfold over the next 15 years. This session will allow firm leaders to be well prepared for the long term strategic thinking that's critical for the development of their Firm's strategic plan today.
- 11:30 a.m. - 12:30 p.m.      **Working with Your Client's CFO** (*Petite Ballroom*)  
**Moderator:** Norm Posner; Samet & Company (Massachusetts, USA)  
**Panelists:**
  - Bob Lentz; Entrepreneur in Residence for NU's Center for Entrepreneurship Education
  - Christopher Lake; Senior Vice President and Chief Financial Officer; Peoples Federal Bancshares and Peoples Federal Savings Bank
  - Mark Anderson; Chief Financial Officer; Granite City ElectricThe company CFO is the key contact for outside accounting firms. Listen and ask a panel of CFOs what they expect from their accounting firm, why they choose a firm, what pleases them and what might cause them to make a change. This is an opportunity for unvarnished client feedback from representatives of various-sized clients in differing industries.
- 12:30 p.m. - 1:45 p.m.      **Lunch** (*Main Dining Room*)
- 1:45 p.m. - 2:30 p.m.      **Advisory Board Report** (*Petite Ballroom*)  
The TIAG Advisory Board reports on the state of the alliance and new initiatives and responds to your questions.
- 2:30 p.m. - 2:45 p.m.      **Networking Break** (*Upper Foyer*)



2:45 p.m. - 4:15 p.m.

## Specialty Group Sessions *(Groups open to TIAG & TAGLaw members.)*

### **Corporate and M&A** *(Grand Ballroom)*

**Topic:** Current trends in Indemnification Provisions in M&A Transactions.

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- Lisa Spearman; Mercer & Hole (London, England - TIAG)
- Oksana Hoey; Murray, Jonson, White & Associates, Ltd., PC (Virginia, USA - TIAG)

4:15 p.m. - 5:15 p.m.

## **A TIAG Two-for-One: Using TIAG to Grow Your Firm & Growth by Acquisition** *(Petite Ballroom)*

Howard Wilkinson; Mercer & Hole (London, England)

In two 30-minute sessions, Howard Wilkinson, TIAG's Best Practices Co-Chair who has led his firm to steady growth, discusses two topics critical for helping TIAG members make the most of their resources and develop their businesses.

### **Using TIAG to Grow Your Firm:**

From marketing strategies (who can forget the memorable 2011 calendar?) to building a referral business, TIAG membership can be used in multiple ways to grow your firm. In this session, Howard Wilkinson shares his ideas on some of the most effective ways to use your TIAG membership to grow your business.

### **Growth by Acquisition:**

Acquiring another firm can significantly boost your revenue and profits, but key factors must be in place to ensure this strategy is successful. In this session, Howard Wilkinson shows fellow TIAG members how he has acquired multiple practices and successfully incorporated them into Mercer & Hole.

6:15 p.m.

## **A Presidential Evening: Gala Dinner at the JFK Library** *(Depart the hotel lobby at 6:15 p.m. to depart by coach and return at 10:30 p.m.)*

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*Dress: Cocktail attire*

## **WEDNESDAY, May 8 (TAGLaw & TIAG)**

9:00 a.m. - 9:15 a.m.

### **Opening Comments and a Preview of Munich** *(Grand Ballroom)*

A preview of Munich, the location for the next TAGLaw and TIAG international conference in October 2013.

9:15 a.m. - 10:45 a.m.

### **Specialty Group Sessions** *(All groups are open to TAGLaw & TIAG members).*

#### **Assurance & SEC** *(Bellevue AB)*

**Topic:** Update on the convergence project between FASB and IASB, including areas of differences not resolved. Presented by Patricia Donoghue, Project Manager at FASB.

#### **Co-Chairs:**

- Paul Webster; Mercer & Hole (London, England - TIAG)
- Robert Reitman; Cornick, Garber & Sandler, LLP (New York, New York, USA - TIAG)

#### **Employment & Labor** *(Taj 2)*

**Topic:** Insurance Coverage and Employment Litigation

This session will focus on appropriate types of coverage, practical considerations and disputes that may develop in litigation that can be potentially averted through careful screening of insurance options.

#### **Co-chairs:**

- Larry Drapkin; Mitchell Silberberg & Knupp LLP (Los Angeles, California, USA - TAGLaw)
- Danielle Muller; Rassers Advocaten (Breda, Netherlands - TAGLaw)

#### **Firm & Practice Management** *(Grand Ballroom)*

**Topic:** Jumpstarting Others' Rainmaking: Teaching partners less marketing and more relationship building.

**Presenter:** Mark Maraia; Maraia & Associates

In this session, you will learn practical tools you can use and share with everyone in your firm to build relationships that stand the best chance of producing revenue. The environment has radically changed since 2008 and there are too many under-productive partners who aren't devoting sufficient energy to relationship building. Come to this session and walk away with tools you can use personally and pass along to your partners. Mark Maraia, will share the most effective tools he sees the world's best rainmakers using every day.

#### **Co-chairs:**

- Richard Few; Smith Moore Leatherwood (South Carolina, USA - TAGLaw)
- Richard Levy; Kuit Steinart Levy LLP (Manchester, England - TAGLaw)

## ***Insolvency and Secured Transactions (Taj 1)***

**Topic:** On Sale Now – Distressed assets of U.S.-Based technology firms are on the auction block and Asian firms are buying.

### **Co-chairs:**

- Andrew Turner; Conner & Winters, LLP (Oklahoma, U.S.A. - TAGLaw)
- Deborah Williamson; Cox Smith Matthews Incorporated (San Antonio, Texas, U.S.A. -TAGLaw)

9:15 a.m. - 12:30 p.m.

**Guest Tour: A Viewing of Select Private Homes on Beacon Hill – Walking Tour**  
(Depart the hotel lobby at 9:15 a.m. and return by 12:30 p.m.)

(See page 37 for complete tour information.)

10:45 a.m. - 11:15 a.m.

**Networking Break (Upper Foyer)**

11:15 a.m. - 12:15 p.m.

**How Professional Advisors Can Add Value to Not-for-Profit Clients (Ballroom BC)**

Anthony G. Wilson, CFA; Managing Director; Cambridge Associates LLC

According to a recent study by The Urban Institute in Washington, D.C., the growth rate of the nonprofit sector has surpassed the growth rate of both the business and government sectors over the past 10 years. Since 2008, financial pressures and regulatory changes have caused nonprofits, high net-worth families and institutional investors to look for more assistance from their outside advisors. Cambridge Associates is a world-wide leader serving this market, providing investment advisory services to more than 650 nonprofits. Hear from Anthony Wilson, a Managing Director of Cambridge Associates, what the top concerns are for these institutions and individuals, the ways that professional advisors can add value to this client sector and how you can differentiate yourself and your firm in this growing market.

12:15 p.m. - 1:45 p.m.

**Lunch (Main Dining Room)**

1:45 p.m. - 2:45 p.m.

**Helping Your Clients Succeed: The Imperative of Business Acumen (Ballroom BC)**

Mark Maraia; Maraia & Associates, Inc.

Most firm leaders are starting to wonder if their current business model is still viable, but may not know why or what to do about it. Some might even contend their current business model isn't broken. More likely it's your partners who will argue that no major change is needed, but what's needed is nothing less than a fundamental rethinking of the relationship between a professional service firm and its clients. Come to this session to hear Mark Maraia (noted author, speaker and coach) spell out what he's seeing in the legal and accounting professions and what's needed to adapt to the changing landscape.

3:15 p.m. - 6:00 p.m.

**Networking Tour: Fenway Park (Depart the hotel lobby at 3:30 p.m. to depart by bus and return at approximately 6:00 p.m.)**

One of the most historic and famous ballparks in America, Fenway Park is largely unchanged since its opening in 1912 and is visited by millions every year. With its manually operated scoreboard, its geometrically peculiar shape and the stories of the legends that have played there for more than eight decades, Fenway remains a link to the legends of baseball's past.

Today you will have the special experience of a behind-the-scenes tour of Fenway Park. This private tour allows fans to step back in time and stroll through Red Sox history, tradition and memories, as well as learn about their current success! You will also get to see what the field looks like from a player's perspective. Learn the history of the famous Green Monster in left field and see the spot in the bleachers where Ted Williams hit his famous home run. By special arrangement, you will also enjoy access to the warning track near home plate (weather permitting) and the opportunity to watch the team take batting practice!

6:30 p.m. - 10:30 p.m.

**Dinner & Networking: MJ O'Connor's – Park Room and Bar**  
(Depart the hotel lobby at 6:30 p.m.)

MJ O'Connor's is within walking distance from your hotel and is the perfect place to enjoy an evening with colleagues! For your exclusive enjoyment, the entire lounge is open only to you and your guests.

As you arrive, you will be offered *hors d'oeuvres* and seating at a mix of high and low cocktail tables. You will also have the opportunity to participate in a baseball networking game with prizes. After visiting the check-in table and receiving a name tag, you will be given five baseball cards. When you get five cards of the same team in your hands, you will be given raffle tickets and a chance to win one of ten prizes! All this while enjoying a variety of great pub food!

## TUESDAY, MAY 6 (TAGLaw)



**Jane E. Owens** (*Principal, The Weson Group LLC*)

**Session Moderator:** *The View from Inside: General Counsel Speak Their Minds about Working with Outside Law Firms*

Jane E. Owens, the panel's moderator, is principal of The Weson Group LLC, a consulting firm that mentors legal professionals in the art of advancing their careers. Previously, she served as Senior Vice President, General Counsel & Secretary of three multinational public companies: Sapient Corporation, a technology services company (2000 – 2011); The Dial Corporation (1997 – 2000); and The Timberland Company (1992 – 1997). Jane began her in-house career as Corporate Counsel of Reebok International Limited, after becoming a corporate partner in a national law firm. She is a graduate of Harvard Law School.

**Session Panelists:** *The View from Inside: General Counsel Speak Their Minds about Working with Outside Law Firms*



**Charles ("Charlie") Gray**

Vice President, General Counsel & Secretary; Teradyne, Inc.



**Danette Wineberg**

Adjunct Professor; University of New Hampshire School of Law



**Gail Mann**

Chief Legal Officer & Secretary; Forrester Research, Inc.



**Krish Gupta**

Senior Vice President & Deputy General Counsel of EMC Corporation



**Scott N. Semel**

Executive Vice President, General Counsel & Corporate Secretary; IntraLinks Holdings, Inc.



**Michael Kraft** (*CEO, Kraft Kennedy*)

**Session Moderator:** *Legal Technology Panel/Q&A*

Michael Kraft, a Kraft Kennedy co-founder, is a former practicing litigation attorney who spent ten years in various management positions in marketing, sales, and product development in the financial printing industry. Michael's legal background, combined with his extensive experience in document processing, gives him a unique perspective on the information management requirements of the legal and financial services professions.



**Marcus Bluestein** (*Chief Technology Officer, Kraft Kennedy*)

**Session Moderator:** *Legal Technology Panel/Q&A*

Marcus Bluestein is the Chief Technology Officer in the New York office of Kraft & Kennedy, Inc. Marcus has extensive experience designing and implementing systems at law firms of all sizes. In addition, Marcus has actively led strategic consulting engagements analyzing firms' technology needs and developing business continuity and disaster recovery plans.



## TUESDAY, MAY 6 (TAGLaw)

**Session Panelists:** *Legal Technology Panel/Q&A*



**Cristián Fabres**

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**Jean-Christophe Beaury**

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(Paris, France - TAGLaw)



### **Susan Lambreth** *(Principal, LawVision Group)*

**Presenter:** *Legal Project Management: A New Model for Enhancing Profitability & Competitive Edge*

Susan Lambreth has over 25 years of experience as a consultant to the legal profession. Ms. Lambreth consults on leadership, practice management and strategic issues affecting the future of law firms and the legal profession. She works with managing partners, practice group leaders and executive committees. Ms. Lambreth has helped many of the largest firms in the U.S. implement strong practice group management (including over 30% of the AmLaw 100) and train their Practice Group Leaders. She has trained over 5,000 lawyers, who hold firm or practice management roles, how to lead and manage more effectively and has trained over 500 lawyers and other legal professionals in legal project management. Ms. Lambreth has helped law firms of all sizes improve their profitability and enhance their lawyers' leadership and management skills. She is nationally recognized as one of the top leadership and practice management consultants for law firms. She has given hundreds of speeches and written dozens of articles on topics ranging from trends, leadership and management issues to process improvement and project management. Ms. Lambreth is co-author of *Achieving Peak Performance Through Practice Management: A Practical Handbook* and author of *The Practice Group Leader's Handbook for Success*. She chairs the highly successful annual Project Management one-day program for the Practising Law Institute. She is also the Chair and Founder of the Legal Project Management Institute, the leading resource for educating law firms and law departments on implementing project management in their organizations ([lpminstitute.net](http://lpminstitute.net)).



### **Lisa H. Rohrer, PhD** *(Director of Executive Education & Research and Fellow at Georgetown Law)*

**Presenter:** *Benchmarking TAGLaw Firms (TAGLaw Special Board Report)*

Lisa's areas of expertise include the leadership and strategy of professional service firms, client satisfaction, and survey research. In addition to launching Georgetown Law's executive education program, she is currently conducting research on the changing management models and structures in law firms, innovation in the legal market, and managing professional talent. Prior to joining Georgetown Law, she was the Director of the Hildebrandt Institute, where she produced executive education programs aimed at law firms and led research projects on the legal profession. She was also a Research Fellow at Harvard Law School, where she co-authored numerous case studies on law firms and other professional service firms. She is a frequent speaker and writer on management, strategy, and innovation in the legal profession. Lisa holds a BA in psychology from Wellesley College, an AM in sociology from Harvard University, and a PhD from the Joint Program in Organizational Behavior at Harvard Business School and Harvard University.



## TUESDAY, MAY 6 (TIAG)

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### Roy Keely (Vice President of Market Strategy, Xcentric)

**Presenter:** *Building Your Firm's Online Reputation*

Roy Keely is the VP of Market Strategy at Xcentric and is charged with articulating Xcentric's value proposition to the accounting community. Roy offers a broad range of experience in marketing, sales and consulting and is passionate about technology, productivity and market strategy. He enjoys writing and speaking to professional service firms looking to bring practical insight and action to their firms and was recognized in The CPA Practice Advisor's "40 Under 40" for 2012. As an elder member of the Gen Y family, Roy stretches the boundaries of "traditional business" as he incorporates today's technology tools into the business realm. Roy is a native Texan and graduated from the University of Houston with a degree in marketing.



### Jim Metzler (Vice President of Small Business Interests, AICPA)

**Presenter:** *The Accounting Profession 2025*

James C. Metzler, CPA, is Vice President – Small Firm Interests for the AICPA. In that role, he leads AICPA initiatives aimed at serving the needs of practitioners, including the activities of the Private Companies Practice Section. He serves as an advocate for small firms on standard-setting, legislative matters, practice issues and as liaison between the AICPA and its member firms. As part of the AICPA senior management team, Jim reports to Barry Melancon and works with him on a multitude of professional issues.

Jim's efforts on behalf of small firms and his activities prior to the AICPA have gained him recognition throughout the profession. He has frequently been named as one of the "The Top 100 Most Influential People in Accounting," a national listing compiled annually by the editors of Accounting Today. In 2005 through 2011 those chosen for the list were asked to compile their own "most influential" list and Jim was one of ten

luminaries in the profession selected for this distinction. Jim received the U.S. Small Business Administration's New York District Office 2007 Financial Services Champion of the Year Award. He was cited for his significant contributions in helping small businesses obtain the accounting services they need to succeed.

Jim has spent more than 37 years working with small firms. Prior to joining the AICPA, he was a co-founder of ConvergenceCoaching, LLC, a national consulting firm dedicated to helping CPA prosper by assisting them to develop and implement success plans.

Jim spent 32 years in public accounting, 24 of them as a partner with Gaines Metzler Kriner & Company, LLP, a local firm in Buffalo, New York. He was also founder GEMKO Information Group, Inc., a successful technology consulting organization.

He is the author of *How to Build a Million Dollar Technology Consulting Practice* and of numerous articles on practice management issues. He is a frequent lecturer for the AICPA, State Societies and global CPA professional associations.



### Norman Posner (TIAG Member: Samet & Company - Massachusetts, USA)

**Session Moderator:** *Working with Your Client's CFO*

Norman is the Managing Shareholder of the firm and has over thirty years experience as a Certified Public Accountant licensed in Massachusetts. In addition to his management role, Norman provides accounting, auditing, and tax planning and preparation expertise to numerous industries including temporary staffing, law firms, real estate, and manufacturing. Norman's exceptional consulting expertise has contributed to the growth and success of his clients.

## TUESDAY, MAY 6 (TIAG)

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**Session Panelists:** *Working with Your Client's CFO*



**Bob Lentz**

Entrepreneur in Residence  
for NU's Center for  
Entrepreneurship  
Education



**Christopher Lake**

Senior Vice President  
and Chief Financial  
Officer; Peoples Federal  
Bancshares and Peoples  
Federal Savings Bank



**Mark Anderson**

Chief Financial Officer;  
Granite City Electric



## Howard Wilkinson (TIAG Member: Mercer & Hole - London, England)

**Presenter:** *A TIAG Two-for-One*

Howard is senior partner and joint managing partner of Mercer & Hole, a 19 partner, Top 50 UK firm of accountants. Howard became managing partner in 1984 and senior partner in 1990 and has many years experience in running and growing an accountancy practice. As well as his management responsibilities, he has run a general practice client caseload throughout this time.

Howard has attended every TIAG conference since TIAG's founding in 2003 and will be well known to many of you. He has presented at several conferences in the past and is presenting 2 half-hour sessions in Boston. The first will draw on Mercer & Hole's experience on how TIAG has helped them to grow and deal with client needs. The second will focus on growing by acquisition and is an updated version of his presentation from 2008, which was so well received.

## TUESDAY, MAY 6 (TAGLaw & TIAG)

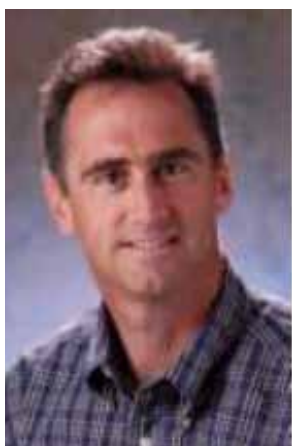


### Anthony Wilson, CFA (Managing Director; Cambridge Associates)

**Presenter:** *Working with Your Client's CFO*

Tony is a Managing Director at Cambridge Associates and has been with the firm since 2001. His primary responsibility is the development and oversight of investment portfolios for nonprofit institutions, private clients and other institutional investors. He focuses his efforts on clients with a significant interest in alternative assets, and also serves as a specialist helping clients construct and oversee hedge fund portfolios.

Prior to joining Cambridge Associates, Tony spent 17 years in corporate finance, most recently as a Senior Vice President and the Managing Director of the Commercial Loan Syndication Group at Citizens Financial Group. Previously, he was a Senior Vice President and group leader at USTrust, where he formed and led the Specialized Lending Group and served as a member of that institution's Executive Management Committee. He also worked at BankBoston in a similar capacity.



### Mark Maraia (Maraia & Associates)

**Presenter:** *Helping Your Clients Succeed: The Imperative of Business Acumen*

Mark Maraia has been licensed to practice law in Colorado since 1983. He has worked both in private practice and as in house corporate counsel. Much of his private practice experience was spent litigating complex commercial matters for a small Denver-based securities boutique law firm. As in house counsel for a Denver-based brokerage firm Mark had oversight responsibility for as many as forty outside law firms.

For five years, Mark was an Adjunct Professor at the University of Denver, College of Law. During that time, Mark designed and taught a skills course on client relations for second and third year students. In 1990 Mark founded his own practice development coaching firm and is now a practice development coach who spends nearly all of his time developing the client relationship skills of lawyers throughout North America and Australia. Mark has personally coached thousands of lawyers and practice groups from numerous practice areas on how to develop the selling and networking skills needed to help them create and strengthen client relationships, both individually and in teams. In so doing, he has helped his clients achieve significant bottom line results.

He has personally coached thousands of lawyers and accountants from a wide range of practice areas including corporate finance, real estate, complex commercial litigation, insurance litigation, tax, securities, international business, environmental, employment, trusts and estates, employee benefits/ERISA, bankruptcy, franchising, state tax, securities litigation, mergers and acquisitions, antitrust, health care, patent and trademark, audit, consulting, financial advisory, risk management and many others.

Mark's prior experience as a practicing lawyer together with his involvement in individual and team selling efforts of law firms throughout North America has given him unusual insights on selling legal services and building client relationships. In addition, he is an avid student of how lawyer-client relationships are formed and deepened and how they are broken off.

He has addressed scores of lawyer audiences throughout the world including separate groups of lawyers in Sydney and Melbourne, Australia. Audience members find his energy contagious and his insights on law firm marketing invaluable. Mark is a 1983 graduate of The University of South Carolina, College of Law and a 1980 graduate of Villanova University.



# International Conference

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Boston

May 6-8, 2013

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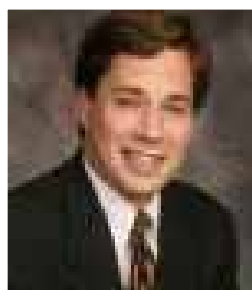
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Boston

May 6-8, 2013

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# TOUR INFORMATION



## MONDAY, MAY 6

### The Best of Beantown: City Highlights Tour & Lunch

For Early Bird TAGLaw and TIAG Members and Guests



Today you will ride through Boston as you take in the sights of one of America's oldest cities! Your first stop will be a visit to Copley Square, where you will see two of the city's greatest architectural landmarks – Trinity Church and the John Hancock Tower. Following a tour of Trinity Church, the director of music will demonstrate the amazing sounds created by the church's two great piano organs, which have a combined 6,898 pipes ranging in length from less than one inch to 32 feet and produce the quality sound of a full orchestra.

Come back on board for a narrated tour through the streets of Beacon Hill, Boston's most prestigious neighborhood, passing by notable stops such as the Old State House and the Old South Meeting House along the way.

Lunch will be served at America's oldest continuously operating restaurant, Ye Olde Union Oyster House. It was here that Daniel Webster took in his daily fill of brandy, water, and oysters. J.F.K. loved to feast in the privacy of the tall wooden booths, one of which has been dedicated in his honor.

After lunch, you will have time to explore Faneuil Hall Marketplace on foot as you make your way to the North End. Known today as Boston's Little Italy, the North End also contains two major landmarks of the American Revolution. The first is the Old North Church. Here, you can see the steeple where American spies placed the lanterns to signal Paul Revere to begin his famous ride. The second landmark in the North End is Paul Revere's house, which you can admire from the outside or opt to take a tour inside. After all of that walking, be sure to enjoy a cappuccino and a cannoli at one of the neighborhood's 56 Italian eating establishments.

**Dress:** Guests should wear appropriate clothing, such as sweaters or light coats, and comfortable WALKING shoes.

**Depart the hotel lobby at 9:15 a.m. and return around 4:30 p.m.**

Price for members and guests: \$199.00 (US)

## TUESDAY, MAY 7

### Guest Tour: Full-Day Tour of The Coast: Salem, Gloucester and Rockport

For TAGLaw and TIAG Guests



Depart Boston via coach for the town of Salem and visit the House of the Seven Gables, made famous from Nathaniel Hawthorne's novel of the same name and now listed on The National Register of Historic Places – join your guide for an unforgettable literary and historical experience!

From Salem, board the bus with a bagged lunch for a trip to Gloucester, the famed fishing town next door. Along the way, you will stop and see the Women's and Men's Fisherman statues, where you can take your photo with the Fisherman's Memorial Monument dedicated to the many Gloucester fishermen lost at sea, and you can take a picture of The Crow's Nest, the tavern featured in the bestselling book and blockbuster movie *The Perfect Storm*.

Upon leaving Gloucester, follow the coastline to Rockport. For more than 160 years, people have traveled to Rockport to enjoy miles of lovely beaches, boulder-strewn paths through woods and glades, and the uncommonly magical light that has inspired painters since Winslow Homer. While visiting Rockport, you will see Motif No. 1, the most painted building in the world. There will be time to visit Rockport's Rocky Neck with its quaint and delightful shops. On the way home, pass through Annisquam, a small village that is part of Gloucester, before joining the main road back to Boston.

**Dress:** Guests should wear appropriate clothing, such as sweaters or light coats, and comfortable WALKING shoes.

**Meet in the hotel lobby at 9:30 a.m. and return at 5:30 p.m.**

Price for guests: \$244.00 (US)



# TOUR INFORMATION



## WEDNESDAY, MAY 8 (MORNING)

### A Viewing of Select Private Homes on Beacon Hill – Walking Tour

(For TAGLaw and TIAG Guests)



Who doesn't want to see how others live? Today's tour will take you inside several of the private homes on Beacon Hill, a 19th-century downtown Boston residential neighborhood situated directly north of the Boston Common and the Boston Public Garden. Beacon Hill is more like a village than part of a big city. It has a rich community life, with neighbors knowing neighbors and everyone meeting on the Hill's commercial streets and participating in its myriad activities.

This walking tour, delivered by the Beacon Hill Circle for Charity, will begin in one of the homes on the Hill, where guests will have a chance to enjoy a morning coffee and pastry. Tour guides will point out the magnificent architecture, style, and history that these residences have to offer as they guide you through three private homes. Most of these homes were built in the early 1800s by the top families of the day. Though rich, these Brahmins were also the personification of Puritan reserve. Showiness was unthinkable, so the exteriors of these homes are the epitome of restraint as elegant doorways and delicate ironwork grace the simple brick facades.

Guests should wear appropriate clothing, such as sweaters or light coats, and comfortable WALKING shoes.

**Depart the hotel lobby at 9:15 a.m. and return by 12:30 p.m.**

Price for guests: \$109.00 (US)

## WEDNESDAY, May 8 (AFTERNOON)

### Networking Tour

(For TAGLaw and TIAG Members and Guests)



One of the most historic and famous ballparks in America, Fenway Park is largely unchanged since its opening in 1912 and is visited by millions every year. With its manually operated scoreboard, its geometrically peculiar shape and the stories of the legends that have played there for more than eight decades, Fenway remains a link to the legends of baseball's past.

Today you will have the special experience of a behind-the-scenes tour of Fenway Park. This private tour allows fans to step back in time and stroll through Red Sox history, tradition and memories, as well as learn about their current success! You will also get to see what the field looks like from a player's perspective. Learn the history of the famous Green Monster in left field and see the spot in the bleachers where Ted Williams hit his famous home run. By special arrangement, you will also enjoy access to the warning track near home plate (weather permitting) and the opportunity to watch the team take batting practice!

**Depart the hotel lobby at 3:30 p.m. and return at approximately 6:00 p.m.**

Price for guests: \$64.00 (US)



# EVENING EVENTS

## MONDAY, MAY 6

### Cocktail Party and Welcome Dinner

(For TAGLaw and TIAG Members and Guests)



Now that everyone has arrived in Boston, it is time to kick off the week with cocktails and enjoy a wonderful dinner with old and new friends.

**TIAG Cocktails:** 6:30 p.m. (The Lounge)

**TIAG Dinner:** 7:30 p.m. (Main Dining Room)

**TAGLaw Cocktails:** 6:45 p.m. (The Roof)

**TAGLaw Dinner:** 7:45 p.m. (The Roof)

**Price for members:** FREE

**Price for guests:** \$150

**Dress:** Men - Business or business casual

Women - Business or business casual or cocktail attire.

## WEDNESDAY, MAY 8

### Dinner & Networking

#### MJ O'Connor's – Park Room and Bar

(For TAGLaw and TIAG Members and Guests)

MJ O'Connor's is within walking distance from your hotel and is the perfect place to enjoy an evening with colleagues! For your exclusive enjoyment, the entire lounge is open only to you and your guests. As you arrive, you will be offered *hors d'oeuvres* and seating at a mix of high and low cocktail tables. You will also have the opportunity to participate in a baseball networking game with prizes. After visiting the check-in table and receiving a name tag, you will be given five baseball cards. When you get five cards of the same team in your hands, you will be given raffle tickets and a chance to win one of ten prizes! All this while enjoying a variety of great pub food!

**Depart the hotel lobby at 6:30 p.m.**

Price for members and guests: \$145.00 (US)

(\$50 for children 12 & under.)

Dress: Casual



## TUESDAY, MAY 7

### A Presidential Evening: Gala Dinner at the JFK Library

(For TAGLaw and TIAG Members and Guests)



Tonight, you will enjoy a truly presidential evening! This unique experience will take place at the John F. Kennedy Library and Museum located on Dorchester Bay and affording panoramic views of the Boston skyline. Standing as a vibrant tribute to the life and times of the 35th President of the United States, the I.M. Pei-designed building serves as both a wonderful museum and a leading research center for the study of mid-20th century American political and cultural life.

Upon arrival at the JFK Library, travel through the museum attached to the National Archives. You will relive the 1960 campaign for the Oval Office and get a rare inside view of JFK's White House years. Leaving the exhibits, you will be greeted in the Pavilion, where you can enjoy the view from the 80-foot glass wall that looks out over the harbor and the Boston skyline, while drinks and *hors d'oeuvres* are served before being invited upstairs to Smith Hall for dinner.

As a crescendo to the evening, you will enjoy a performance by the famous Harvard Krokodiloes, Harvard University's oldest and most prestigious a cappella singing group. The "Kroks" will perform popular American hits from the eras of the 1920s, 30s, 40s and 50s.

The JFK gift shop will be open for guests.

**Depart the hotel lobby at 6:15 p.m. and return at 10:30 p.m.**

Price for members: FREE

Price for guests: \$195.00

Dress: Cocktail

# UPCOMING CONFERENCES



## TAGLaw® & TIAG® International Conference



Munich, Germany - Kempinski Hotel | October 21-23, 2013

## TAGLaw® & TIAG® INTERNATIONAL CONFERENCE

MAY 5-7, 2014  
FONTAINEBLEAU  
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## NOTES



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Download session notes and materials at:  
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