



A Worldwide Network of Quality Law Firms

TAG AcademySM

Professional Skills Course

NOVEMBER 12-14, 2009

Hilton St. Petersburg Bayfront

St. Petersburg, Florida

**An essential training program for the next
generation of law firm leaders.**

What is the TAG Academy Professional Skills Course?

Dear Professional:

Our next Professional Skills Course will be held in St. Petersburg, Florida on November 12-14, 2009 and someone from your firm should be there!

No one wants underperforming or even average lawyers, but how do you distinguish your firm from others? One way is to make sure that your lawyers not only know the law, but also to ensure they have the skills essential to practicing successfully.

The *TAG Academy Professional Skills Course*, geared toward the next generation of law firm leaders, separates its participants from their peers by teaching critical and practical skills that aren't offered elsewhere. Just think about the number of times you've said "I wish I was taught those skills in law school," and our curriculum will come to mind: persuasion, negotiation, interviewing, marketing.



Here is what prior attendees have said:

About Business Development for Your Career: "an essential course for all associates"; "important topic which is not taught at law school"

About Understanding a Financial Statement: "A must for all attorneys"; "there is very little taught about this aspect of practice"

About Negotiation Skills: "Helpful and necessary for all attorneys"

About Client Interviewing: "Good topic, well researched, planned and delivered"

Your lawyers will return better equipped to benefit the firm and the firm's clients and to appreciate what they need to know and do to succeed.

Two changes have been made to the curriculum at the recommendation of our participants. First, noted law firm consultant Peter Giuliani will lead a session on "What It Means to Be a Partner," another practical topic that isn't taught as part of a law school curriculum. Second, Florida appellate lawyer Matthew Conigliaro will bring his years of oral advocacy experience to bear as the faculty member for "Presentation and Persuasion Skills."

I can't think of anything more important to the development and growth of your firm than preparing your future leaders with the skills they need to succeed.

Please register at www.signupmaster.com/theappletongroup. Cost for the Course is \$695 if you register by October 15th; \$795 if you register after October 15th.

I hope to see you in November.

Regards,

A handwritten signature in black ink that reads "Bob".

Robert U. Sattin
President
TAGLaw | TAG Academy | TIAG
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rsattin@taglaw.com

Professional Skills Course Agenda

Hilton St. Petersburg Bayfront
St. Petersburg, Florida
November 12-14, 2009

Conference moderator: Robert U. Sattin

Thursday, November 12

6:30 p.m.

Cocktail Reception (*TAGLaw Members Only*)
Red Mesa Cantina (www.redmesacantina.com)
Address: 128 3rd Street South
(within walking distance of hotel)

7:30 p.m.

Dinner (*TAGLaw Members Only*)
Fresco's Waterfront Bistro (www.frescoswaterfrontbistro.com)
Address: 300 2nd Avenue NE
(within walking distance of hotel)

Friday November 13

8:00 a.m.

Breakfast

8:45 a.m.

Introduction

9:00 a.m.

What It Means to Be a Partner

Peter Giuliani; Shareholder; Smock•Sterling Strategic Management Consultants
Ownership may have its benefits, but it also has its responsibilities. Most new partners are unaware that admission to equity ownership requires mastering many new skills. Law firm consultant Peter Giuliani will teach lawyers what they need to know to succeed as co-owners of a business and how to prepare for and meet the challenges of success.

10:30 a.m.

Break

10:45 a.m.

Presentation and Persuasion Skills

Matthew J. Conigliaro; Shareholder; Carlton Fields
Whether it is at a meeting, leading a professional or community organization as a volunteer, speaking on a professional topic or standing before a tribunal, lawyers have to present publically and have to persuade. Effective speaking can be taught and in this session, leading Florida appellate advocate Matthew Conigliaro will instruct on the skills needed to present and persuade in all of the roles lawyers assume as professionals.

12:15 p.m.

Lunch

1:30 p.m.

Business Development for Your Career

Peter Giuliani; Shareholder; Smock•Sterling Strategic Management Consultants
To build a practice and become a valued partner, a lawyer has to master some basic business development skills. These can range from preparing a long-term personal marketing plan to the basics of how to "work a room." Good marketing habits are important to all lawyers and Peter Giuliani will teach this session on the marketing skills that should be known and practiced by all lawyers.

3:00 p.m.

Break

3:15 p.m.	Client Interviewing <i>Robert U. Sattin; President; TAGLaw</i> Client intake is a critical step in the practice of law. It requires an awareness of at least eight rules of professional responsibility and has marketing, time management and presentation skills implications. Knowing what to ask and how to approach an initial client or prospective client interview is key to avoiding ethical, professional and business traps. Learn how to control these meetings and it will lead to better sleep and a better career. Bob Sattin will draw on his 33 years in law practice to teach the keys to these client meetings.
4:45 p.m.	Adjourn
<u>Saturday, November 14</u>	
8:00 a.m.	Breakfast
9:00 a.m.	Understanding a Financial Statement <i>Joseph A. Meyers, II; Partner; Hurd, Hawkins, Meyers & Radosevich, P.A.</i> Understanding a financial statement is necessary in almost every area of law practice, whether it is corporate law, matrimonial law, bankruptcy law or commercial litigation. This session will teach participants how to understand a balance sheet, an income statement, and the footnotes that contain the relevant, but less obvious, clues to a client's, a borrower's, an acquisition target's or an adversary's financial footing. Joe Meyers is a CPA and certified valuation analyst. He served as the vice president of the Florida Chapter of the National Association of Certified Valuation Analysts and presently serves on the national committee with oversight of State Chapters. He has taught scores of continuing education courses.
11:00 a.m.	Break
11:15 a.m.	Negotiation Skills: How to Ensure the Best Results for Your Client <i>Frank M. Young III; Partner; Haskell Slaughter Young & Rediker, LLC</i> <i>Robert U. Sattin; President; TAGLaw</i> What are the essential elements of successful negotiation and how can you become a successful negotiator? Is it always up to the plaintiff to make the first offer? At what point in a dispute is it best to initiate negotiation? Should the client always be present? Frank and Bob combine for over 70 years of practice experience dealing with litigation, bankruptcy and transactional issues and have experience as arbitrators, mediators, clients and advocates.
12:45 p.m.	Questions & Comments We look forward to your feedback on the Professional Skills Course.
1:00 p.m.	Lunch
2:00 p.m.	Adjourn

Professional Skills Course Speakers



Matthew J. Conigliaro
Shareholder
Carlton Fields, Attorneys at Law

As a shareholder at Carlton Fields in St. Petersburg, Florida, Matt concentrates his practice on appellate and complex commercial litigation. His work principally involves commercial and tort litigation, health care

and products litigation, coverage, intellectual property, and constitutional litigation.

Matt is Board-Certified by The Florida Bar as a specialist in Appellate Practice. He is an active member of The Florida Bar Association and a frequent speaker and author on appellate law and many other areas related to his practice. Matt's blog at www.abstractappeal.com is the first blog devoted to Florida Law and the Eleventh Circuit Court of Appeals.

Matt received his law degree, *cum laude*, from Tulane Law School, where he was a member of the *Tulane Law Review*. He received his bachelor's degree from the University of North Carolina. He is AV Rated by Martindale-Hubbell, was selected for inclusion in *Florida Trend's* Florida Legal Elite in 2006 and 2009, and was selected for inclusion in Florida Super Lawyers 2007, 2008 and 2009.



Peter A. Giuliani
Partner
Smock•Sterling Strategic
Management Consultants

Peter Giuliani is a Partner at Smock•Sterling Strategic Management Consultants. His law firm management experience spans more than 36 years, both as a management

consultant to law firms and other professional service firms (29 years), and as Executive Director of Cummings & Lockwood, a 180-lawyer law firm based in Stamford, Connecticut (7 years). His functional specialties include strategic planning; financial management, administrative and technology infrastructure planning; strategic mergers, acquisitions, and divestitures; and practice group management.

Peter has directed, conducted or participated in more than 350 consulting assignments for law firms or corporate law departments involving such matters as strategic planning, merger and acquisitions, divestitures, partner compensation and performance evaluation, practice group structure, partner retirement planning and partnership structures.

Prior to joining Cummings & Lockwood, Peter was a consultant with four major consulting firms. He spent five years as Vice President and CFO of Altman Weil and five years as a Partner in Pensa International, a firm that he helped found and that merged with Altman Weil in 1991. He was a Principal and Partner at Arthur Young, where he also served as National Director of Legal Consulting Services. He began his consulting career in 1968 at the New York Office of Price Waterhouse.

Peter has an A.B. in Economics and Philosophy from The College of the Holy Cross and an MBA in Managerial Economics and Finance from Cornell University. He is also a Certified Public Accountant (inactive status) and a Certified Management Consultant. In 1998, he was elected a Fellow of the College of Law Practice Management in recognition of his career-long dedication and contribution to improving the management of law firms.

Professional Skills Course Speakers



Joseph A. Meyers, II,
CPA, CVA
Principal
Hurd, Hawkins, Meyers &
Radosevich, P.A.

Joe began his career in public accounting in Washington, D.C. in 1980, after graduating from the University of Maryland. In addition to serving his client

base, Joe is the audit and attestation principal for HHM&R and has almost 30 years of public accounting experience with governmental, not-for-profit and commercial enterprises. He has provided assurance services in compliance with GAAS, Single Audit, Yellow Book, Florida Auditor General, and governmental auditing standards. Joe has served two terms on the Suncoast Chapter Board of Directors of the Florida Institute of Certified Public Accountants and as a member of the Practice Review Committee.

Joe is a certified valuation analyst, and as such has provided valuation services to a wide variety of clients and other CPAs. He served as the Vice President of the Florida Chapter of the National Association of Certified Valuation Analysts and presently serves on the national committee with oversight of State Chapters. Joe is also a licensed securities advisor and insurance agent.

Joe has taught over 40 professional education seminars to CPAs on a wide variety of topics and served as a trainer of the firm's professional staff. He drafted and is responsible for maintaining the firm's system of quality control. The firm has always received an unqualified opinion on its' peer reviews.

He has a broad base in business matters having served as the managing shareholder, treasurer, corporate secretary, insurance coordinator and personnel director of the firm.

His experiences include a variety of civic and charitable endeavors including, Stake President of the Church of Jesus Christ of Latter-day Saints, Scoutmaster, little league coach and board member, and chamber of commerce affiliations. Joe and his wife, Mary, have five children. He enjoys his service work, genealogy and an occasional round of golf.



Frank M. Young III
Partner
Haskell Slaughter Young &
Rediker, LLC

Frank Young founded the firm's litigation practice in 1974 and currently serves as Chair of the Litigation Practice Group. His practice encompasses representation of plaintiffs and

defendants in all types of civil litigation, with particular concentrations in the areas of commercial litigation, products liability, aviation litigation, employment litigation and healthcare litigation. In addition, he heads the firm's international law practice and served as the first chair of the Alabama State Bar's International Law Section. In 2005, 2006 and 2007, Mr. Young was recognized in the *Birmingham Business Journal's* "Best of the Bar" poll in International Law, and he is currently recognized in *The Best Lawyers in America* in International Trade and Finance Law. He is also listed in *Alabama Super Lawyers*.

As the firm's primary representative to TAGLaw, an international network of attorneys and law firms, Mr. Young was instrumental in establishing the firm's China practice relationships with the firm of Baker & Daniels, an international law firm with offices in Beijing and Qingdao, China. In addition, in 2005 Mr. Young was part of the City of Birmingham's Sister Cities Official Delegation to Anshan and Beijing, China.

Mr. Young has augmented his practice with extensive involvement in civic and community affairs. In 1999, he received the L. Burton Barnes Community Service Award from the Birmingham Bar Association. He was also named Distinguished Alumnus of the Year by the Cumberland School of Law in 1991 and received the Community Service Award of The Rotary Club of Birmingham in 1988. In 2007, he was named president of the American Committees on Foreign Relations, and in 2008, he was named to the Honor Roll for Excellence in Foreign Languages and International Engagement by the University of Alabama at Birmingham's Department of Foreign Languages and Literatures.

Mr. Young served in 1969 as Law Clerk to United States District Judge H.H. Grooms, Northern District of Alabama, and practiced with a large firm in Birmingham before joining Haskell Slaughter shortly after the firm was founded. In addition to his legal practice, he has been involved in entrepreneurial business ventures and venture capital investing, and has served on the boards of directors and audit committees of public companies listed on the American and New York Stock Exchanges and of privately held companies.

Professional Skills Course Speakers



Robert U. Sattin
President
The Appleton Group, Inc.

Prior to joining The Appleton Group, Bob was in private legal practice for 34 years, the last 22 years of which was with Reid and Riege, P.C. in Hartford, Connecticut, where he founded and chaired the insolvency practice group. Between 1999 and the time he joined The Appleton Group, he was on the TAGLaw Advisory Board and was co-chair of the Insolvency and Secured Transactions Specialty Group.

Bob's private practice encompassed the representation of debtors, lenders, creditor's committees, investors, directors and other parties of interest in the Chapter 11 process, in- out-of-court restructurings and related litigation. He also has extensive experience in the representation of lenders and borrowers in financial transactions and has been trained and has served as a mediator and arbitrator.

Bob has served as the chair of the Connecticut Bar Association Section on Commercial Law and Bankruptcy, as a vice president of the Association of Commercial Finance Attorneys, as a member of the Board of Directors of the Connecticut Chapter of the Turnaround Management Association, as a member of the Advisory Committee to the Connecticut Law Revision Commission regarding the adoption of Revised Article 9 of the Uniform Commercial Code and as a member of the Merit Screening Committee for the District of Connecticut Bankruptcy Judgeship in 1998.

He has published articles in many professional and other newspapers and journals, including the *American Bankruptcy Institute Journal* and the *Connecticut Bar Journal*.

He has spoken extensively throughout the country to groups such as the American Bankruptcy Institute, the Connecticut Bar Association and the Association of Commercial Finance Attorneys on topics relating to legal ethics, bankruptcy, insolvency, commercial litigation and the Uniform Commercial Code. Bob has also been a faculty member for TAG Academy.

Bob has been recognized in various publications as one of The Best Lawyers in America, The Best Lawyers in Connecticut and New York Area's Top Lawyers. He is a graduate of the University of Rochester and the University of Connecticut School of Law.

Hilton St. Petersburg Bayfront



TO RESERVE YOUR HOTEL ROOM:

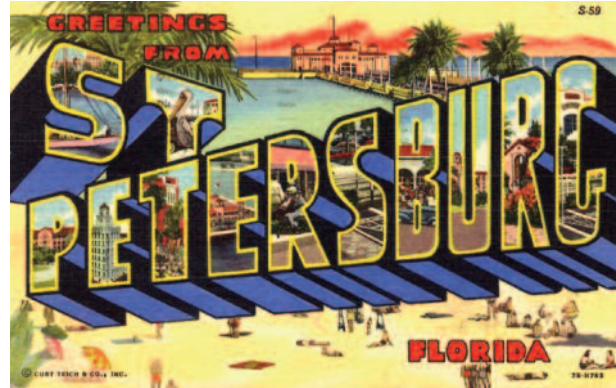
Hotel rooms will fill up quickly during this peak season, so make your reservations soon!

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About the Professional Skills Course Destination - St. Petersburg, Florida

Come to the TAGLaw headquarters in sunny St. Petersburg, Florida...the city that holds the Guinness World Record for most consecutive days of sunshine (a stretch lasting 768 days that began in 1967), has the largest city marina in the United States, and has 244 miles of shoreline.

Tourism: Located in the Greater Tampa Bay area, there is much to do in the Sunshine City of St. Petersburg. Visitors can soak up the sun at the beach, browse through a world-class museum or stroll along streets lined with graceful Mediterranean-style architecture. There are six museums in St. Petersburg alone, including the Florida International Museum (a Smithsonian Institution affiliate), a Museum of Fine Arts, the Salvador Dali Museum, and the Florida Holocaust



Museum, the fourth largest in the United States. Whatever your taste, St. Pete offers everything under the sun. The city's central west coast Florida location makes it easy to go beyond and explore. Visit St. Pete's nearest neighbor, Tampa—a city with its own identity and cultural pulse. There are theme parks, zoos and a plethora of additional shopping centers. Busch Gardens, the Lowry Park Zoo and the Florida Aquarium are just 30-40 minutes away. Be under the "magic" spell of Orlando's many theme parks in just 90 minutes. A three-hour drive takes you to Florida's east coast (Daytona), and a journey south over the Sunshine Skyway Bridge links with Sarasota and beyond to Sanibel Island, Ft. Myers and Naples.

Weather: In November, the average high temperature in St. Petersburg is 77°F (25°C), with an average low of 60°F (16°C). For a timely weather forecast, visit www.weather.com prior to the conference.



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