



TAGLaw® 2009 Annual Review



A Worldwide Network of Quality Law Firms

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MEMBER Q & A

Q: Describe an instance when you were able to better serve your client by referring work to a TAGLaw firm.

A: A major (and slightly unexpected) advantage of our TAGLaw membership relates to inquiries received from potential clients in other countries. Potential clients typically contact several French law firms regarding the same matter. We are able in our response to instruct the potential client to call the TAGLaw member firm in his or her locality for a reference. For example, several different TAGLaw members in the US were able to confirm to potential clients that they physically meet me every six months or so, and have known me for a number of years. This enabled us to clinch the deal on virtually every occasion.

— Philip Jenkinson
Triplet & Associés
Lille, France

A Message to Members



By all of the measures we use to judge our progress as a network, 2009 was a good year. We, along with our members, had justifiable concerns entering the year that economic and political instability around the world would dramatically and adversely affect TAGLaw and its members. Such was not the case and we hope the strength of the network contributes to helping each of our firms approach 2010 with the same optimism and enthusiasm that motivates us as we approach what we do each day.

While firm dissolutions and break-ups resulted in the loss of members in Philadelphia, PA, USA and in Montreal, Québec, Canada, we were pleased that substantial new members were admitted in both jurisdictions. Seven other new firms joined TAGLaw in places as distinct from one another as Armenia and Rhode Island in the US. TIAG experienced a substantial increase in membership and is now over 100 member firms. Independently, but especially in combination, our networks represent a major international economic presence.

Communication and referrals among member firms, both within TAGLaw and between TAGLaw and TIAG, are active and provide a welcome protection to clients and a contribution to the market presence of member firms.

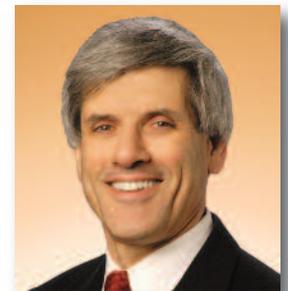
The Budapest and Las Vegas conferences were well-received on all levels—educational, social and professional. We thank our host firms for showing us their fine cities. If you have not been able to attend a TAGLaw International Conference, we urge you to do so; it will be worth the effort! Meeting your colleagues is only one of the many reasons to plan for Amsterdam in May. Great programs, great host firms, and a great city are among the others.

Activity in other areas flourished in 2009 as well. TAG Academy continued to receive wonderful reviews, and for 2010 we have attracted top-name faculty members to address the critical management, marketing, loss prevention and practice issues facing all of you. The Professional Skills Course received rave reviews in which both the educational component and the networking were cited for their value.

There was an increase in the level of activity among specialty groups, including cross-network collaboration. Some of the specialty groups held successful live conferences, and the TAGLaw and TIAG Tax groups have started regularly scheduled joint conference calls.



2009 also brought changes to your TAGLaw team. Jennifer Allen has become our Executive Director and we look forward to her talents being applied, increasingly, to all aspects of The Appleton Group's business for many years to come.



Regrettably, our Director of Member Services, Cameron Fuller, decided for family reasons to move back to his wife's native Idaho. Cameron played a major role in the development of TAGLaw, and especially TAG Academy, and will be missed by all of us.

I urge all of you to peruse this Annual Review and focus especially on the many ways you and other TAGLaw members realize value from their membership. The last TAGLine of 2009 wished all of you a "happy, healthy, wealthy and wise" new year. While we cannot do much about "healthy," we continue to strive to provide some help with the other wishes.

We look forward to seeing you soon; in Amsterdam, at a regional conference, or perhaps even at your office. Thank you for your continued membership in and support of TAGLaw.

Peter Appleton Jones

Bob Sattin

The TAGLaw Team



From left to right: Anne Appleton Jones, Vice President; Jenifer Quiles, Administrative Assistant; Cameron Fuller, Director, Member Services; Jennifer Allen, Executive Director; Bob Sattin, President; Jacky Breeden, Director of Operations; Kenneth Mayers, Director, Member Relations; Lourdes Allende, Coordinadora de Programas en Latinoamérica; Peter Appleton Jones, Chairman and Founder

* * * * *

Good luck to Cameron Fuller, his wife Tonia and their four children. In January, Cameron and his family returned to Southern Idaho, where Tonia grew up. He was a valued member of the TAGLaw team for many years and will be missed personally and professionally by all of us at TAGLaw.

TAGLaw Growth



The global economic conditions in 2009 had a mixed impact on TAGLaw growth for the year. We attracted 10 new member firms, providing evidence that forward-thinking law firms understand the competitive advantage offered by an international alliance in an era that is marked by both financial belt-tightening and continuing globalization. Once again new members came from all over the globe: five from Europe (including three from Eastern Europe), three from North America, and one each from Latin America and Asia.

On the other side of the ledger, nine firms left TAGLaw, all but two of them based in North America. One left as the result of a merger, another when it dissolved its corporate and commercial practice, and a third when the firm closed its doors. The three new North American firms were rapid replacements for three of the departing firms.

Included in both the gain and loss figures is one firm that was absorbed into a larger firm that immediately became a TAGLaw member.

Once again TAGLaw's sister alliance of accounting firms, TIAG, made major gains during 2009, realizing a net gain of 12 firms around the globe.

TAGLaw Current Totals

Countries:	82	
Total Firms:	146	
Total Offices:	309	
Region	Lawyers	Firms
Asia Pacific	837	17
Europe	1948	50
Latin America	639	21
Middle East - Africa	72	6
North America	4331	52
Totals	7827	146

TAGLaw & TIAG Combined Totals

Countries:	89	
Total Firms:	249	
Total Offices:	524	
Region	Firms	
Asia Pacific	34	
Europe	82	
Latin America	45	
Middle East - Africa	18	
North America	70	
Totals	249	
Estimated Total Revenue	\$2.5 Billion	
Estimated Total Professionals	9500	

New Members

Yerevan, Armenia
Concern-Dialog Law Firm

Minsk, Belarus
Revera Consulting Group

Montreal, Québec, Canada
Cain Lamarre Casgrain Wells

Beijing, China
Golden Gate Lawyers

Bogotá, Colombia
Gómez-Pinzón Zuleta Abogados S.A.

Bucharest, Romania
Musat & Asociatii

Stockholm, Sweden
MAQS Law Firm

Lausanne, Switzerland
Carrard & Associés

Pennsylvania, USA
Schnader Harrison Segal & Lewis LLP

Rhode Island, USA
Little Medeiros Kinder Bulman & Whitney PC

Conference Report



2009 International Conferences

Budapest, Hungary May 4-6

From *Corporate Social Responsibility* to the *Risk Profiling of Clients*, the Budapest conference kept its participants stimulated and energized. The agenda also reflected an increased emphasis on specialty group activity with some specialty groups combining resources to focus on topics of common interest. But perhaps the most unforgettable of the conference events was the short trip on a vintage steam train to the Hungarian Railway Historic Park and Museum, where we dined, danced and celebrated among the 50 locomotives stored in the roundhouse.



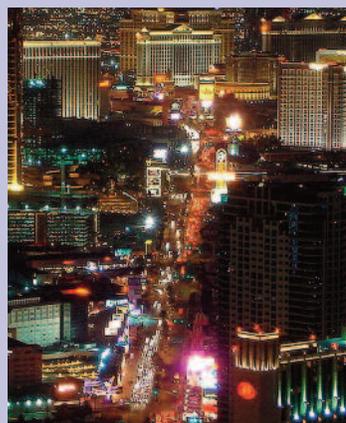
MEMBER Q & A

Q: Describe your experience at the Budapest conference. What value did you receive from the conference?

A: Our firm participated in the Budapest conference in the midst of global economic uncertainty. The conference provided reassurance of the high-quality and innovative nature of the firms in the network and their commitment to the success of the network and individual member firms.

— Barbara Lano Rummel
Lindquist & Vennum PLLP
Minneapolis, Minnesota, USA

Las Vegas, Nevada, USA October 26-28



There is a famous saying that "What happens in Las Vegas stays in Las Vegas." That may be true in some cases, but not when it comes to a TAGLaw International Conference. Amidst the glitter and glamour of Las Vegas attractions, our conferees took away enhanced relationships with their

peers around the world as well as useful insights on such pressing issues as strategic planning during a recession and leveraging market-based strengths to boost profits. The flexibility of both The Appleton Group staff and TAGLaw attendees was demonstrated when the planned outdoor dinner at the Las Vegas Springs Preserve was forced indoors by an unseasonable chill wind. But the delightful surprise was the tremendous success of the optional bowling night at the Red Rock Lanes.



Future International Conferences



Spring 2010
Amsterdam, Netherlands
May 10-12, 2010



Fall 2010
Toronto, Ontario, Canada
October 25-27, 2010



Spring 2011
Zurich, Switzerland
May 9-11, 2011



Fall 2011
Rio de Janeiro, Brazil
October 2011

Regional Meetings

The following regions gathered for TAGLaw Regional Meetings in 2009:

Western / Midwestern Region

March 27-29
Denver, Colorado, USA
Host: Lindquist & Vennum PLLP

European Region

April 3-4
Jersey, Channel Islands
Host: Voisin

Latin/Central America

September 18
Panama City, Panama
Host: Galindo, Arias & López

Specialty Group Meetings

The following Specialty Groups held live meetings or conference calls in 2009:

Competition & Antitrust

June 10
Brussels, Belgium
Host: Marx Van Ranst Vermeersch & Partners (MVVP)

TAG Property Group

November 12-14
London, England
Host: Boodle Hatfield

Marketing & Business Development

January 22, April 16, July 23, October 8
Conference Calls

**THANK YOU TO ALL
MEETING HOSTS AND ORGANIZERS!**



Live Webinars and Recordings

2009 was another successful year for TAG Academy. Lawyers and accountants participated in 40 live webinars, and by close of the year, there was an impressive library of more than 90 recorded courses from which to choose on the TAG Academy website. Our top-notch, highly-accomplished faculty included TAGLaw members, in-house counsel and well-known industry consultants. The course list focused primarily on law firm marketing and management—critical topics during a stressed economy.

We have consistently received positive feedback on our TAG Academy courses and, for 2010, we have put together another great lineup of courses on the most important issues facing law firm management, individual lawyers and marketing professionals. We will again offer a number of firm, practice and risk management courses, and new this year are courses geared specifically toward your firm's young lawyers and marketing professionals. We think it is one of our best course schedules yet, due in part to the fact that we have learned a lot about which courses are in high demand, and which speakers are the most effective. We have therefore made many changes, and will continue to watch registration trends and analyze your feedback to tailor the Academy to meet the needs of our members.

For more information, visit www.tagacademy.com.

Professional Skills Course: November 12-14

With reviews that said the course was "worth every minute," and "you cannot learn these things elsewhere," and with every attendee saying he or she would recommend the course to others, we are justifiably proud of the Professional Skills Course. The third of these live courses, presented under the auspices of TAG Academy, was held November 12-14 in St. Petersburg, Florida. Lawyers came from locations as far apart as Kansas and Poland, and strengthened not only their legal practice skills, but also the bonds among TAGLaw firms.

The Skills Course is designed to take lawyers out of the library, out of the classroom, and out of their offices, and put them where they need to be in order to become fully rounded professionals, i.e. in front of an industry group giving a talk; taking a prospective client to lunch; sitting in their first partners' meeting; meeting a client or potential client for the first time; or being handed a financial statement during a client meeting. Those are real world settings, and the Skills Course offers real world skills. Faculty includes lawyers from TAGLaw member firms and TAG Advisors Bureau members, among others. Mark your calendars for November 2010 and reward your future law firm leaders with learning and relationships that will last them a lifetime.

TAGLaw Highlights



Specialty Groups

Each year, specialty groups play an increasingly important role in TAGLaw, and continue to prove a valuable part of TAGLaw membership. Not only do these groups serve as a vehicle for members to network with colleagues who share areas of practice, they are evolving as a source of collaboration among member firms.

2009 saw the conception of a new specialty group, new co-chairs, dedicated specialty group conferences, regularly-scheduled conference calls and cross-network efforts with corresponding TIAG specialty groups. The specialty group sessions at conferences are becoming more and more sophisticated, and continue to run over their scheduled time. To try to keep up with demand, time scheduled for specialty groups at conferences will be increased in 2010.

The most notable changes among the groups this year include:

- The launch of the Franchise Law Specialty Group, co-chaired by Chris Bradley of Duncan Cotterill in Christchurch, New Zealand and Natalma McKnew of Smith Moore Leatherwood LLP in South Carolina, USA.
- The revamp of the Tax, Trusts & Succession Specialty Group. The Group was renamed the Tax Specialty Group and has an increased focus on matters of international and commercial tax. Sean King of Williams Mullen in Richmond, Virginia, USA and Dr. Dirk Schellack of GGV Grützmaier / Gravert / Viegner in Germany joined Hilton Bell of Milling Benson Woodward L.L.P. in New Orleans, Louisiana, USA as co-chairs to the Tax Specialty Group.
- The appointment of new co-chairs for the Environmental Law and Health Law specialty groups. Howard Kenison of Lindquist and Vennum in Denver, Colorado, USA and Baerbel E. Schiller of Spencer Fane Britt & Browne LLP in Kansas City, Missouri, USA will lead the Environmental Law Specialty Group. Mary Chant of Blake Laphorn in Southampton, England and David J. Edquist of von Briesen and Roper, s.c. in Milwaukee, Wisconsin, USA will take the lead in the Health Law Specialty Group.
- The development of dedicated specialty group meetings. The Competition and Antitrust Specialty Group held a live

meeting in June in Brussels, Belgium, and the Real Estate Specialty Group (TAG Property Group) held a live meeting in November in London, England.

- The cross-network collaboration among specialty groups from TAGLaw and TIAG. The Tax specialty groups from each network held a successful joint meeting in Las Vegas, and continued their momentum with monthly conference calls. The TAG Property Group, including firms from TAGLaw and TIAG, collaborated together at the 2009 MIPIM conference.

We thank all of the co-chairs who have continued to lead their groups and volunteer valuable time to making them run and keeping activity alive.

TAGLaw Website

As an international organization, TAGLaw relies heavily on its website to keep members connected—both to the TAGLaw organization, and to fellow members. It is often the first and sometimes the only window into our organization for many members and their clients. Therefore, it must truly reflect the quality, breadth and depth of the network.

With that in mind, and after an evaluation of the TAGLaw website, TAGLaw determined it was time for a visual and functional upgrade, and therefore announced plans to launch a new website in early 2010. The website indeed launched in early 2010, and included many improvements and new features.

Doing Business Guides

The "Doing Business Guides" that we receive from both our TAGLaw and TIAG members will receive increased exposure on our new website. We strongly encourage those of you who have not yet submitted one to do so. Guides prepared by the law and accounting firms in the same jurisdictions have differed in emphasis sufficiently that we will continue to post multiple Guides covering the same area. Our members have used the Guides for many purposes:

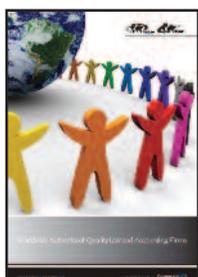
- When a matter is being referred, the Guide establishes the credibility and credentials of the firm to which a matter is being sent. This is of particular import to the client being referred.



- Since the Guides are posted on a public area of the website, they serve to attract clients and help in client competitions, especially if there are Guides covering many of the world's jurisdictions. The presence of Guides prepared by both accounting and law firms also serves to distinguish our networks from their competitors.
- The Guides, once prepared, become an important part of a firm's marketing materials. They are designed to provide basic information about the laws and regulations of a jurisdiction, as an invitation to clients and referral sources to retain a firm; they are not intended as the final answer to sophisticated questions.
- The Guides serve as effective training tools for those who prepare them.

Many of the Guides that are currently posted can serve as templates for future Guides. Please take some time to review them; you will be impressed.

Corporate International



TAGLaw and TIAG were featured in a supplement to the August issue of *Corporate International Magazine* (formerly *Corporate UK*). The combined supplement explored the value TAGLaw and TIAG provide their members and clients, and provided a clear message about the full global services the networks offer to clients through legal and accounting support.

The supplement was distributed to over 60,000 readers throughout the world, including directors of mid- to large-sized public and private businesses, private equity and institutional investors, investment and commercial banks, in-house legal advisors of global businesses and professional financial, accountants and legal advisors.

Member firms had the opportunity to participate in the supplement by purchasing firm profiles, resulting in a marketing tool that provided significant exposure to the network and member firms through the magazine's circulation and website, reprints, and electronic versions of the supplement.

Advisory Board

2009 concluded the four-year term of three Advisory Board members. Gillian Leach of Blake Lapthorn in Southampton, England; Dan Polsenberg of Lewis and Roca LLP in Las Vegas, Nevada, USA; and Barbara Lano Rummel of Lindquist and Vennum PLLP in Minneapolis, Minnesota, USA completed their service to the TAGLaw Advisory Board. We would like to sincerely thank Gill, Dan and Barb for their attentive and distinguished guidance to TAGLaw.

This year brought Simon Fitzpatrick of Boodle Hatfield in London, England; Jeff Kennedy of Martin, Pringle, Oliver, Wallace & Bauer, L.L.P. in Wichita, Kansas, USA; and Alexander Lourie of Barack Ferrazzano Kirschbaum & Nagelberg LLP in Chicago, Illinois, USA to the TAGLaw Advisory Board. We look forward to their participation in advancing the TAGLaw cause during the next four years.

MEMBER Q & A

Q: Describe why TAGLaw specialty groups are beneficial to you.

A: As co-chair of the TAG Property Group, group activities have become part of my everyday working life, and have helped expand my horizons and reach for clients. The relationships I have built are deep and go far beyond the Group and my original expectations. The Group has also helped me to better understand a number of the firms within TAGLaw and TIAG and has shown what great potential there still is for further development of the specialty groups. I am a real fan. The group continues to develop with great dividends for the big investors. My participation has really made me think about how we can better use the groups to develop relationships—there is still much growth to go, but we are already seeing the rewards.

— Karen Mason
Boodle Hatfield
London, England

TAG Advisors Bureau



The goal behind the TAG Advisors Bureau is to provide our members with a stable of expert resources and consultants that will help them be more competitive and successful. These advisors come highly recommended. They have a proven track record of success in improving their clients' professional competitiveness, visibility in the marketplace and financial footing. Most of the firms have been used by either The Appleton Group or our member firms, and many have spoken at conferences or have participated as faculty for TAG Academy.



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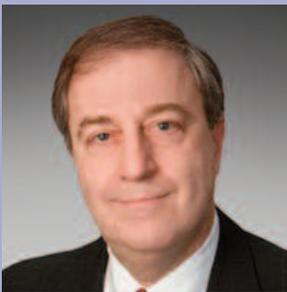
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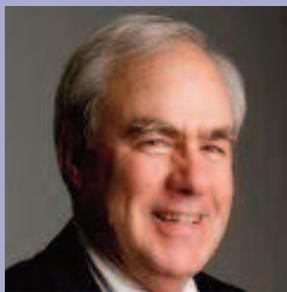
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Last Word



We hear frequently how important TAGLaw relationships, at the firm level and at the personal level, are to all of our members. This is a source of great satisfaction to all of us at The Appleton Group. It is the result of quality people, who do quality work, spending quality time together at conferences and building trusting relationships around the world. Thank you for your contribution to the network.

With 249 firms in TAGLaw and TIAG combined, and growing, our goals remain to maintain the excellence of our professionals; to insure continued interaction among members, especially at the specialty group level; and to continue the high-quality educational programs provided throughout the year.

We encourage your continued active involvement in TAGLaw and we hope to see you in Amsterdam and Toronto.

— Bob Sattin, President, The Appleton Group, Inc.



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