

# CONTINUING LEGAL EDUCATION

THE BAR ASSOCIATION OF SAN FRANCISCO



The Solo and Small Firm Section of the Barristers Club presents

## The Financial Elephant in Your Firm: Debt, Assets, and Insurance

**Tuesday**  
**September 29, 2020**

Program: 2:00 - 3:15 p.m.

### Speakers

#### **Brian Le**

New York Life Insurance Company

#### **Jen Lee**

Jen Lee Law

#### **Wendy Roberts, CPA, CIA, CISA**

Principal CEO, Spectrum Business Financing

### **MCLE: 1 Hour**

To receive MCLE credit, you must sign in during the designated MCLE registration period. This activity is approved for Minimum Continuing Legal Education credit by the State Bar of California. BASF is a certified provider.

Provider #103

**In-Person Location** (Due to the social-distancing rules currently in place, this event is currently planned as an online-only presentation. Please check the CLE calendar for any changes.)

### **Cost**

\$30 Section Members

\$45 BASF Members, Government & Nonprofit Attorneys

\$60 Others

FREE for BASF Student Members

All prices increase \$10 on the day of the program.

**Event Code:** B201472

### **BASF Members:**

Be sure to log in to get your discounts!

Refunds will be given up to 48 hours in advance, less a \$10 handling fee.

### **Special Requests:**

People with disabilities should contact BASF regarding reasonable accommodations.

The elephant in every room is that more than 70% of Americans have a debt or credit problem, including our clients. But, none of us are willing to talk about it because we think we are alone, that others won't understand, and/or that we will be judged. In reality, we are all struggling with the exact same issues and it's becoming more difficult to ignore the weight of financial stress on attorneys and clients.

### **Topics**

- Discussing financial realities with clients
- Issues in getting paid under the Rules of Professional Conduct
- Dealing with debt, including student loans
- Financial stress and the impact on lawyers and competency

### *Section Co-Chairs:*

*Anna Liu, Steven Adair MacDonald & Partners & Liên Payne, Kennedy Payne*

**Event Code: B201472 Register online: [www.sfbare.org/calendar](http://www.sfbare.org/calendar)**

**CLE Webcast:** [www.sfbare.org/online-cle](http://www.sfbare.org/online-cle)



Live



Recorded  
Available Oct 9