The Solo and Small Firm Section of the Barristers Club presents

**How to Retire as a Solo or Small Firm Lawyer**

*Considerations in estate planning, employment & ethics*

**Tuesday**

**September 22, 2020**

**MCLE Registration:** 11:30 a.m. - 12:00 p.m.

**Program:** 12:00 - 1:15 p.m.

**Speakers**

**Brigitte Binkert**

Brigitte Binkert Law Offices

**Adam Koss**

KOSS FIRM

**Katherine Zarate Dulany**

Zarate Dulany Law

**Moderator**

**Lindsey Mignano**

Smith Shapourian Mignano

**Topics**

- Ownership rules for professional corporations and law firm partnerships (CA Rule 5.4 and CA Rules of Professional Conduct Rule 3.157);
- Issues with transferring law firm shares or partnership interests into a trust to avoid probate;
- Whether a retiring “Of Counsel” can be properly classified as an independent contractor under AB5 in California;
- Implications for “fee sharing” with retiring “Of Counsel” under Rule 1.5.1; and
- Competency concerns arising from an untimely death.

**Event Code:** B201476

**Register online:** www.sfbar.org/calendar