



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.

## 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

## Location

Bar Association of San Francisco  
301 Battery Street, 3rd Floor  
San Francisco, CA 94111

## 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.

This is a brown bag luncheon.

**Event Code:** B201476

## 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.

Section Co-Chairs:

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

**Event Code: B201476 Register online: [www.sfbar.org/calendar](http://www.sfbar.org/calendar)**

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



Live



Recorded  
Available Oct 3