

The Bar Association of San Francisco presents

SOLO AND SMALL FIRM ANNUAL CONFERENCE - 2026

Ten Years In: How the Solo and Small Firm Toolkit can take your practice to the next level
- Implementing strategies from the toolkit

Time: 12:00 p.m.

Opening Remarks

Richard Zuromski, Seifert Zuromski

Time: 12:10 - 1:10 p.m.

Keynote Speaker

Honorable Murlene Randle
San Francisco Superior Court

Time: 1:10 - 1:25p.m. | Break

Time: 1:25 - 2:25 p.m. | MCLE: 1 Hour

Panel I: Business Formation, Protection and Promotion

Business structures, trademarks, logos and cost-efficient firm promotion

Speakers

Alan Seher, Niesar & Vesta
Hannah Stitt, Tectonic Law

Moderator

Inga Miller, Miller Property Law

Time: 2:40 - 3:40 p.m. | MCLE: 1 Hour in Prevention and Detection Competence

Panel II: CTAPP Compliance – How Does It Really Work?

Dispelling Myths and What Do You Do If You Are Audited

As we come upon the deadline for the CTAPP requirement, this session will give attorneys a clear understanding of CTAPP and why it is important. You will leave this session with practical guidance for managing your trust account and how to keep the common mistakes from happening at your firm. Understand the requirements and purpose of the Client Trust Account

Speakers

Diane Camacho CLM, DLC Consulting Services
Thomas D'Amato, D'Amato Law Corporation

Moderator

Matt Gluck, Gluck Daniel Atkinson

Topics

- Protection Program (CTAPP) and how it impacts your firm's compliance responsibilities
- Practical internal control strategies to safeguard client funds
- What do you need in an Audit
- Recognize common trust accounting mistakes and discover practical steps to prevent errors that could lead to compliance issues or disciplinary action

Time: 3:55 - 4:55 p.m. | MCLE: 1 Hour in Recognition and Elimination of Bias

Panel III: First Hire to Final Goodbye: Strategic Employment Practices

How to Hire, Fire and Manage your W2 Employees to Grow your Firm

Speakers

Terri Leoni, Leon Law
Rose-Ellen Fairgreive, Fairgreive Law Office
Ryan Stahl, Scherer Smith & Kenny

Moderator

Rachel Naor, London & Naor

Topics

- How to conduct compliant hiring, including any areas that employers are prohibited from asking about during the hiring process
- How to classify employees, including how to determine whether a new hire should be classified as an independent contractor or W-2 employee, and if the latter, whether that hire should be exempt or non-exempt
- Laws governing employee leave, and how to craft compliant sick/PTO leave policies
- Performance management, including the interactive process and how to offer reasonable accommodations; how to handle workplace complaints; and how to implement performance improvement plans
- Employee offboarding and terminations, including severance agreements and all required state law notices

Planning Committee

Christie Dudley, Attorney at Law
John B. Lough, Jr., Scherer Smith & Kenny LLP
Anne Gyemant Paris, Gyemant Paris Law
Richard Zuromski, Seifert Zuromski LLP

Section Chair

Richard Zuromski, Seifert Zuromski

**Thursday
March 19, 2026**

MCLE Registration: 11:00 a.m.- 12:00 p.m.
In-Person Program: 12:00- 5:10 p.m.
Reception to Immediately Follow.

MCLE: 3 Hours of which 1 Hour is in Recognition and Elimination of Bias, and 1 Hour is in Competence Credit

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

In-Person
BASF Offices
50 Fremont Street, Suite 1700
San Francisco, CA

Reception Location

In-Person
Studio Golf Bar and Grill
350 Mission Street
Mezzanine Level
San Francisco, CA

Cost

Free for BASF Law Students
\$50 for Section Members
\$60 for BASF Members
\$75 for All Others
All prices increase \$10 on the day of the program

Pre-registration is required.

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www.sfbar.org/calendar

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