

Strategies for Combining Legal and Financial Advice: Client Referrals, Joint Ventures and ABS



The Law Society

Locations: London, Manchester, Birmingham, Leeds
Dates: 5, 19, 25 May and 29 June
2 CPD hours - Cost £125

Overview

The Legal Services Act presents solicitors with the opportunity to regain their historic role as a primary resource in managing their clients' affairs. To do so, they must meet two challenges: to extend their services into practice areas which enable them to maintain long-term relationships with their clients; and to embrace management structures and processes which ensure that they work efficiently as unified business units. These seminars are designed to address these issues within the framework of the Legal Services Act and to provide you with crucial information about financial services to help you develop practical action plans that will help your firm achieve competitive success.

Who should attend?

Managing partners, chief executives, private client lawyers, marketing partners, and those likely to assume the roles of Head of Legal Practice ('HOLP') and Head of Finance and Administration ('HOFA') required by the Legal Services Act.

The speakers

Stuart Bushell, Legal Affairs Director, SIFA
Ian Muirhead, Solicitor, Managing Director, SIFA

Other speakers

- Manchester: Colin Lawson of Equilibrium Asset Management
- Birmingham: Richard Wood, Barnett Ravenscroft
- Leeds: Lew Howes, Fensham Howes
- London: Lee Robertson, Investment Quorum

Delegate material

Each delegate will receive a complimentary copy of SIFA's guidance pack 'Business Procedures for Principles-Based Regulation', which includes precedents that will provide useful guidance in making decisions about your own firm's approach.

Programme

- 14.00 Registration and coffee
- 14.30 **Stuart Bushell** reports on field research into the emerging business models for solicitors' practice development, including multi-disciplinary practices, hub and spoke, joint ventures and strategic alliances. Regulatory and practical issues are also considered.
- 15.10 **Ian Muirhead** discusses the way in which principles-based regulation has been used by the Financial Services Authority to assist the firms it regulates to adopt modern business procedures, and how solicitors can benefit from the experience. Topics covered will include: Know Your Client, database management, client segmentation, management information analysis, client surveys, internal communications and marketing.
- 15.50 Coffee break
- 16.10 The final session will explore the relevance of investment business to solicitors' trust and private client services. It will also delve into the new emphasis on asset allocation and cost efficiency as a means of achieving consistent returns.
- 16.40 Panel Q&A
- 17.00 Close

Dates/venues

05 May 2010 - London, The Law Society, 113 Chancery Lane, WC2A 1PL
19 May 2010 - Manchester, Ramada Piccadilly, Portland Street, M14PH
25 May 2010 - Birmingham, Radisson Blu Hotel, 12 Holloway Circus, Queensway, B1 1BT
29 June 2010 - Leeds, 4 Whitehall, Whitehall Quay, LS1 4HR

Strategies for Combining Legal and Financial Advice: Client Referrals, Joint Ventures and ABS



The Law Society

For enquiries please telephone 020 7316 5700 or email seminars@lawsociety.org.uk

Please note: bookings for this event **cannot** be taken on the phone

To book and pay

Online

To register for this event online, please go to www.lawsociety.org.uk/events. Select the event you want to attend and click on the 'Booking instructions' tab. You can pay by credit card or cheque. **If you pay by credit card your booking will be confirmed immediately. If you reserve a place online and pay by cheque, your booking will be confirmed as soon as we receive the cheque.**

By post

To register please complete the form below in CAPITAL LETTERS and return it with a cheque made payable to **The Law Society** to: Finance Department, The Law Society, Ipsley Court, Berrington Close, Redditch, Worcestershire B98 0TD or DX: 19114 Redditch

Title: _____ First name: _____ Surname: _____

Position: _____ Organisation: _____

Address: _____

Postcode: _____ Telephone: _____ Fax: _____

DX: _____ Email: _____

Please use separate forms to enter details of additional delegates

I would like to attend the following training course

- | | | | |
|--------------------------------------|------------|---------------------------------------|------------|
| <input type="checkbox"/> 05 May 2010 | London | <input type="checkbox"/> 25 May 2010 | Birmingham |
| <input type="checkbox"/> 19 May 2010 | Manchester | <input type="checkbox"/> 29 June 2010 | Leeds |

If you are booking within two weeks of the seminar, please contact us to ensure there are places available via e-mail at: seminars@lawsociety.org.uk

Registration fee

£125 plus VAT =£146.88 per delegate

No. of delegates

Total payment

Joining instructions will be sent by email one week before the event.

Special requirements

Please advise if you have any special requirements: _____

Office Use:

MK03-CEV004-
LB101

Terms and Conditions

1. Event documentation will be distributed on the day.
2. The Law Society reserves the right to amend or cancel this event. Should the event be cancelled a full refund of the registration fee will be made. The Law Society can accept no further liability if the event is cancelled, including no liability for any expenses incurred as a result of cancellation.
3. If you have any special dietary requirements you must give us written notice at least 10 working days before the event and a supplement may be payable.
4. Full payment is required unless you give written notice of cancellation at least 10 working days before the event, in which case you will be refunded the registration

fee less an administration charge of £25 + VAT.

5. You may substitute a colleague without charge, provided you confirm their full name in writing before the day of the event.
6. The delegate and the firm/organisation are jointly and severally liable for payment of the fees due.
7. The Law Society can accept no liability for any loss suffered by any person acting or refraining from action as a result of the material delivered during or in connection with the event.
8. Acceptance by the Law Society of your booking will give rise to a legally binding contract between us on these terms and conditions.