DailyDAC, LLC d/b/a Financial Poise™
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FINANCIAL POISE WEBINAR ONE SHEET
LAWYERS' LATERAL MOVES 2023
All episodes air at 1:00 PM CST

ABOUT THIS SERIES

As with every Financial Poise webinar, each episode in this series is delivered in Plain English understandable to investors, business owners, and executives without much background in these areas, yet is also valuable to attorneys, accountants, and other seasoned professionals. And, as with every Financial Poise webinar, each episode brings you into engaging, sometimes humorous, conversations designed to entertain as it teaches. Each episode in the series is designed to be viewed independently of the other episodes, so that participants will enhance their knowledge of this area whether they attend one, some, or all episodes.

EPISODE SUMMARIES

About Episode #1
The Do's and Don'ts of a Lateral Partner Move: Preparing For and Getting the Offer
September 14, 2023 at 1:00 PM CST

Lateral partner moves have been on the rise in the legal profession the last few years. When making a lateral move, there are multiple issues that must be considered including legal, ethical and business issues. When considering a move, timing and sequencing are also critical factors that must be taken into consideration. Please join us to learn how to successfully navigate these thorny issues. This webinar will focus on lateral partner moves and feature a lively discussion with two well-respected and seasoned legal recruiters, Amy McCormack and Dan Binstock, who will provide the dos and don'ts from their perspective. The panel also will discuss the applicable laws and ethical rules that must be followed in connection with a lateral partner move including what information can be disclosed in a lateral partner questionnaire, what information can be disclosed in connection with a conflicts search, what to look for in your current partnership agreement and when can you speak to the clients and colleagues about the move. This is a must see for any partner who is considering a lateral move.

This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.

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About Episode #2

The Do's and Don'ts of a Lateral Partner Move: Critical Issues in Negotiating the Offer and the Departure Process

November 16, 2023 at 1:00 PM CST

You have received an offer or perhaps multiple offers as a result of the interviewing process and now must make a decision of which firm to select. What needs to be considered when making this decision? Episode #2 of this two-part series focuses on negotiating the offer, including which provisions are the most important and why. For example, what are the billable hour expectations and how do realization rates factor into the proposed compensation being offered? How will the ramp-up period at the new firm impact those metrics? The panel also discusses recent trends in the market and how those trends can impact the negotiation process. The panelists who are seasoned recruiters and have negotiated literally hundreds of deals will also discuss pitfalls that they have observed and how to avoid them. Also discussed during this episode is an in-depth analysis of the law and ethical rules that a lateral partner must adhere to when providing notice to the firm, after notice to the current firm has been provided but before the lateral partner is released from her current firm and common post-departure issues such as collecting outstanding AR and recouping capital contributions. These issues are critical in successfully completing a lateral move and this final episode should not be missed.

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