Annual Meeting
September 15, 2011 – Long Beach, CA

Ethical Attorney Advertising and Solicitation in the Social-Media Age

Robert D. Brownstone and Gideon Grunfeld

Item A – Slides – Handout Version
Item B – Presenters’ Bios (Brownstone & Grunfeld)
Item C – Resources/Links – Rules, Articles, etc.
Item D – LPMT Flyer
Item E – LPMT Application

THESE MATERIALS ARE MEANT TO ASSIST IN A GENERAL UNDERSTANDING OF CURRENT LAW AND PRACTICES. THEY ARE NOT TO BE REGARDED AS LEGAL ADVICE. ORGANIZATIONS OR INDIVIDUALS WITH PARTICULAR QUESTIONS SHOULD SEEK ADVICE OF COUNSEL.

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Ethical Attorney Advertising and Solicitation in the Social-Media Age

Annual Meeting – 9/15/11

Robert D. Brownstone

Gideon Grunfeld

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I. Introduction and Case-Studies

II. Web 2.0 Rewards and Risks

III. Solicitation & Advertising
   A. Test Your Instincts
   B. Social-Media Sites
      1. Protecting Your Reputation Online
      2. So Where is This Going?

IV. Questions/Conclusion
I. Intro – Who Is Here at this Panel?

- Attendees
  - Robert Brownstone
  - Gideon Grunfeld
I. Introduction & Case-Studies

A. Firm-sponsored Facebook page
   - w/o its own attorney-client privilege disclaimer but links to one on firm site?
   - IRS 230 Disclaimer?
   - default privacy settings tweaked?
   - vet friend requests against Conflicts/opposing-counsel database?
   - post photos of clients?
I. Case-Studies/ Hypos (c’td)

B. Twitter

• @WeWinEveryCase?
• tweet links to law articles written by:
  ➢ own firm?
  ➢ Others?
• engage in dialogues on legal issues?
• vet followers/following against Conflicts/opposing-counsel database?
I. Case-Studies/ Hypos (c’t’d)

- C. LinkedIn
  - join, and/or post on, Groups?
  - vet connection requests against Conflicts/opposing-counsel database?
  - ask others to recommend you?
  - make recommendations of others?
II. Web 2.0 Rewards & Risks

A. Rewards

- Now, *many* more forums [some: F&W clients]
II(A). Web 2.0 Rewards \((c't'd)\)

  - Live customer traffic @ > 700 orgs. (not survey):
    - Business responsiveness
    - Rich research
    - Sales/Marketing
    - Transparency
    - Networking

* Also an F&W client
II(A). Web 2.0 – B. Some Risks – The Big Picture

- Intentionally Harmful
  Intentional Disclosures

- Inadvertently Harmful
  Intentional Disclosures ("Netiquette"; Social-Media; Sock-Puppeting; P2P)

- Unintentional Losses of Sensitive Info.
II. B. Risks – 
1. InfoSec

- Viruses, Worms & Malware, Oh My!
  - INCOMING!
    - "STUDY: FIFTH OF FACEBOOK USERS EXPOSED TO MALWARE"
    - phishing/whaling, P2P...
  - OUTBOUND!
    - Ex: Facebook/Farmville breach
  - See generally the lists at pp. 15 and 17 of
II(B). Risks – 2. Search-/Capture-/Discover-ability

a. Search-ability of PUBLIC Posts

- **ROBERT BROWNSTONE, Electronic Information Management, Electronic...**
  Mr. Brownstone is the Firm’s Law & Technology Director. He advises clients on electronic discovery, on electronic information management and on...
  www.fenwick.com/attorneys/4,2,1.asp?id=544 - Cached - Similar

- **Robert Brownstone, Fenwick & West Director of Law & Technology...**
  Aug 6, 2008 ... Fenwick & West LLP is pleased to announce the appointment of...
  www.fenwick.com/pressroom/5,1,1.asp?mid=566&loc=pr - Cached

- **Robert Brownstone Biography**
  Robert Brownstone is an executive coach and organization effectiveness consultant working in the San Francisco Bay Area. Robert has had an enriching...
  www.neisendorf.com/index.php?...robert-brownstone... - Cached - Similar

- **Rob Brownstone, Neurosurgery Division, Dalhousie University**
  Functional neurosurgery: Movement disorders; Complex pain syndromes; Epilepsy surgery; Intrinsic brain tumors. Email: rob.brownstone@dal.ca...
  neurosurgery.medicine.dal.ca/brownstone.htm - Cached - Similar

- **Robert Brownstone | Facebook**
  Robert Brownstone is on Facebook. Join Facebook to connect with Robert Brownstone and others you may know. Facebook gives people the power to share and...
  www.facebook.com/robert.brownstone - Cached

- **Robert Brownstone - Santa Clara Law**
  Robert Brownstone ediscoveryguru@yahoo.com (650) 335-7912. EDUCATION: J.D., Brooklyn Law School, Magna Cum Laude B.A., Swarthmore College...
  law.scu.edu/faculty/profile/brownstone-robert.cfm - Cached

- **Robert Brownstone profiles | LinkedIn**
  View the profiles of professionals named Robert Brownstone on LinkedIn. There are 5 professionals named Robert Brownstone, who use LinkedIn to exchange...
  www.linkedin.com/pub/dir/Robert/Brownstone - Cached

- **Robert Brownstone (ediscoveryguru) on Twitter**
  Robert Brownstone (ediscoveryguru) is on Twitter. Sign up for Twitter to follow Robert Brownstone (ediscoveryguru) and get their latest updates.
  twitter.com/ediscoveryguru - Cached
II(B)(2). The 3 –abilities (c’t’d) –
b. Capture-ability

- File . . . save as . . .
or Adobe PDF-Maker
- Web-capture software
- Wayback Machine (Internet Archive)
II(B)(2)(b). Capture-ability (c’t’d) – Twiddley diddley deet

- No context

- Tweets are especially persistent
  - Jeffrey Rosen, *The Web Means the End of Forgetting*, NYT (7/19/10)
II(B)(2). The 3 –abilities (c’t’d) –
c. Discover-ability

- **Recent Developments:**
  - Social-media/UGC increasingly in use
    - Within organizations (wikis, SharePoint, etc.)
    - On web on entity-sponsored sites/pages
    - By employees on own personal sites/pages
      - See the Facebook “button”
  - Case-law has been emerging
    - Decisions cites/links available on request
II(B). Risks (c’t’d) – 3. Sock-Puppeting/Regulatory

- “[Wild] OATS [Markets] has lost their way and no longer has a sense of mission or even a well-thought-out theory of the business. They lack a viable business model . . . .”

- “Perhaps the OATS Board will wake up and dump [C.E.O. Perry] Odak and bring in a visionary and highly competent C.E.O."

- “I like [OATS rival Whole Foods Markets Chair and C.E.O. John P.] Mackey’s haircut. I think he looks cute!”

• Some of 7 years of postings by Whole Foods co-founder Mackey himself on Yahoo Finance’s bulletin board
II(B)(3). Sock-Puppeting/Regulatory (c’t’d)

- **Anonymous or Pseudonymous Posts . . .**
  - Another Ex: *Embattled PG&E SmartMeter Executive Resigns* (11/11/10)

- **May Violate:**
  - Federal Antitrust Laws
  - Federal Securities Laws
  - FTC online-advertising guidelines as to Endorsements & Testimonials. See this [Lit. Alert](9/2/10)

- *Compare* FDA regulatory concerns re: non-anonymous “Facebook Share” situation:
  - FDA/HHS, *Warning Letter* (7/29/10) (Novartis/Tasigna)
II(B). Risks (c’t’d) – 4. PII of PHI Disclosed

- Photos . . . . TAG . . . . You’re it . . . .

- See ARMA, EU Investigates Facebook, Google Tagging, Info. Mgmt. (July-Aug. 2010)
II(B)(4). PHI Disclosed

- HIPAA concerns in Virginia
  Henschel, Facebook Terminations: Friends Don’t Let Friends Talk Smack About Their Job, LexisNexis Applied Discovery Blog (4/12/10)
  <http://Facebook-HIPAA-4-12-10.notlong.com>

- See also Cal. state notice-of-breach statutory expansion in 2007 = A.B. 1298
III. Solicitation & Advertising

- A. Test Your Instincts
Thumbs Up or Thumbs Down?

1-800-PIT-BULL

PAPE CHANDLER
Personal Injury Attorneys

1-800-PIT-BULL
Thumbs Up or Thumbs Down?
Thumbs Up or Thumbs Down?

expect more from your law firm.
Half Price Lawyers

Low Price GUARANTEE

High Quality Legal Service at Half Price?

Half Price Lawyers is able to charge lower legal fees because we only hire experienced seasoned attorneys who have already handled lots of cases like yours. Experienced attorneys can usually find the answers more quickly than new lawyers lacking experience. Our lawyers are serious about winning cases and their experience can save you time and substantial money in legal fees. We just charge less.

Why Half Price Lawyers?

Free consultation with an experienced Nevada lawyer and not a
“For the good of the legal profession and the justice system . . . this type of non-factual advertising can not be permitted. “

How Good Was Your Ethical Intuition?

1-800-PIT-BULL
There is no absolutely clear path
IIII. Solicitation/Advertising – B. Social-Media Sites

1. Protecting Your Reputation Online
Victor Clark Cohen's Reviews

Back to profile

Average Rating
★★★★★
Based on 3 reviews

Help make it easier for other Avvo users to choose the right lawyer by sharing your experience with this attorney. It's fast, simple, and safe.

Review this lawyer

Note: Lawyers, use the Peer Endorsements section to provide input about other attorneys.

Client Reviews

Effective Problem Solver
Posted by: Michael, 5 months ago. Flag as objectionable
Overall rating ★★★★★
Trustworthy ★★★★★
Responsive ★★★★★
Knowledgeable ★★★★★
Kept me informed ★★★★★

Client Review:
Understood my concerns and was very instrumental in solving all my legal issues.

[Additional content not visible in the image]

File for Bankruptcy $395:
Experienced. Thousands filed. Free consult. Services for all debt.
www.CleanStartLawFirm.com

Top LA Crime/DUI Lawyer
All Felonies & Misdemeanors - Trial Attorneys with Results. Avoid Jail!
BerlinFirm.com

Ron & Robert on Divorce
Educing and advising families through toughest of times.
RonandRobertOnDivorce.com

Bankruptcy Attorney
$1200 Flat Rate Bankruptcy Affordable and Professional
www.freedomtocompensatevice.com

Add by Google
Class B telecommunications harassment charge... should I represent myself?

Viewed 20 times. Posted 3 months ago in Criminal Defense - Houston, TX.

My daughter's mom filed telecommunications harassment charges on me for posting nude photos of her on Facebook. There is no evidence of it. I threatened to send them out and told them she had no evidence, should I plead guilty? Can I plead no contest? What should I do? I don't have money for a lawyer but I don't think they will provide me one. How should I handle this?

This question is no longer open to new answers.

Answers (4)

Andrew Johnston Williams

You should not for any reason represent yourself. If there is no evidence, you do not need a lawyer.
Rosario Stornello
Level 5 Contributor

Posted 3 months ago. This attorney is licensed in Texas.

The first thing you need to remember is that anything you say will be used against you including this post. You should NEVER discuss the facts of your criminal case with anyone except your hired or appointed attorney. Also, a citizen should NEVER represent himself in a criminal case. If you try to hire an attorney and are financially unable, the court will appoint you an attorney. Under the US and Texas Constitutions you have a right to a lawyer and if you can't afford one one will be appointed.

When any citizen is charged with a crime they need a lawyer to evaluate the case and give them all of their options. Maybe the State does or does not have evidence against you. You will not know until you have a lawyer look at the case. Please get a lawyer on your case ASAP.

Notice: The information contained herein is intended as general legal information and does not create an attorney-client relationship and is not governed by confidentiality rules. This general legal information is not a substitute for seeking the direct advice of legal counsel.

Stornello Law Firm

Mekisha Jane Murray
Level 7 Contributor

Posted 3 months ago. This attorney is licensed in Texas.

It is never a good idea to represent yourself where jail time is a possibility.
III(B). Social-Media Sites (c’t’d) – 2. So Where is This Going?
2 reviews for Law Offices of Afshin A. Asher, Inc.

All Reviews

John P. 5/13/2010 1 photo
5 stars
I trust him. Although not a card-carrying friend of Dorothy (he has a wife and kids), Afshin is very friendly to the gay community. In fact, LAMDA referred him to us as he volunteers at their legal clinic. Afshin specializes in estate planning, tax law, asset protection, probate and business law. If you have to go to extraordinary and unfair lengths imposed by a bigoted society to protect yourselves as a gay couple (things most straight couples don't have to bother with), by all means give Afshin and his sweet assistant Victoria a call. Afshin's services are not just limited to the gay community—he can and will help anyone: single or couple or family, gay or straight, and frankly because of the complexity of our case. I am sure he would be able to figure out just about any legal maze you may find yourself in. He's nice, caring, creative and has a good sense of humor...I looked long and hard to find him, and it was worth the research.

Sydney G. 9/5/2010
Afshin is knowledgeable, patient and all around a pleasure to work with. I am so glad to have found him and am grateful that I have a reliable estate planning lawyer to turn to.

About This Business
The Law Offices of Afshin A. Asher is a "boutique" law firm located in Century City, Los Angeles. By narrowing its scope of practice to one area of law, the firm provides a singular focus on estate planning, trust administration, probate, and business law.
IV. Conclusion/Q&A *(c’t’d)*

*Let’s be careful out there . . .*

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- **Robert D. Brownstone**
  
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  <rbrownstone@fenwick.com>
  
  <fenwick.com/attorneys/4.2.1.asp?aid=544>
  
  <twitter.com/ediscoveryguru>
  
  (@ediscoveryguru)

- **Gideon Grunfeld**

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  (@GideonGrunfeld)
Robert D. Brownstone advises clients on electronic discovery, electronic information management, retention/destruction policies and protocols, information-security and privacy. He also collaborates with clients as to computer solutions enabling compliance with legal obligations.

A nationwide speaker and writer on many law and technology issues, Mr. Brownstone is frequently quoted in the press as an expert on electronic information. He also teaches Electronic Discovery Law & Process classes at the University of San Francisco School (USF) of Law and Santa Clara University School of Law.

Mr. Brownstone is a member of: four state bars (including California and New York); the Information Systems Auditing and Control Association (ISACA) and the Association of Records Managers and Administrators (ARMA). Mr. Brownstone is also the Chair of the executive committee of the State Bar of California’s Law Practice Management and Technology (LPMT) Section.

He serves on the Advisory Board of the National Employment Law Institute (NELI) and on the Board of Editors of ALM’s Internet Law & Strategy newsletter. In 2006, Mr. Brownstone was named a Northern California Super Lawyer and featured in a cover story of ABA’s Law Practice Magazine.

Before joining Fenwick & West in 2000, he had a varied 13-year career as a litigator, law school administrator, law school teacher and consultant.

From 1995 to 2000, Mr. Brownstone was the Moot Court Program Coordinator at USF School of Law. During the 1997-98 school year, he also acted as Associate Dean for Academic Affairs and Director of Legal Research & Writing at JFKU School of Law in Walnut Creek, California. From 1992 to 2000, Mr. Brownstone taught Legal Research Writing & Analysis at USF Law.

Between 1990 and 1995, Mr. Brownstone had key roles in some publicized cases. From 1986 to 1990, when Mr. Brownstone practiced in New York, he was on plaintiffs’ counsel's team in the civil suit against Claus von Bulow and on Lowell Milken’s defense team in multiple Drexel Burnham Lambert matters.

In 1986, Mr. Brownstone received his J.D., magna cum laude, from Brooklyn Law School, where he was a Notes Editor and a published author on the Brooklyn Law Review. In 1982, Mr. Brownstone received his B.A. in English literature and political science from Swarthmore College.
Gideon Grunfeld Biography

Gideon Grunfeld is the President of Rainmaking For Lawyers, which provides business coaching and consulting services to attorneys and law firms. Based in Beverly Hills, Rainmaking For Lawyers advises on a wide array of marketing and practice-management-related issues, including coaching partners and of counsel to grow their practices, increase their visibility and attract clients, and increase their fees. Gideon served for five years as the Chair of the Solo, Small Firm, and Law Practice Management Section of the Beverly Hills Bar Association, and is a Special Advisor to the Law Practice Management & Technology Section of the State Bar of California.

Gideon started his career in the human resources field. After graduating from the University of Pennsylvania with a degree in Economics, Gideon worked as a consultant at National Economic Resource Associates, and was a human resources manager for both a Fortune 500 company and a non-profit.

Gideon started his legal career in San Francisco. He is a cum laude graduate of the University of California, Hastings College of Law, where he was a member of the Moot Court Board and an Assistant Articles Editor of the Hastings Law Journal. Following graduation, he clerked for U.S. District Court Judge Gary L. Taylor in the Central District of California. He was then was a business litigator and antitrust attorney for almost ten years, first at the Los Angeles office of Skadden, Arps, Slate, Meagher & Flom, and then at Covington & Burling in Washington D.C.

Gideon writes extensively about lawyers and law practice. His recent publications have addressed issues such as “A Strategic Approach to Fee Arbitration in California,” “Effective Marketing Messages for Business Clients,” “Ethical Requirements Relating to Attorneys’ Fees and Fee Agreements,” and “New Obligations to Return Electronic Documents at the End of a Representation.” He is also one of the authors of the treatise, “The California Guide To Opening And Managing A Law Practice,” which was published in 2009 by the California State Bar.

Gideon has spoken to more than 3,000 lawyers at law school alumni chapters and at bar associations such as the San Francisco Trial Lawyers Association, the Los Angeles County Bar Association, the Orange County Bar Association, and the state bar associations of California, Colorado, Illinois, Massachusetts, New Jersey, New York, and Pennsylvania. His presentations have addressed issues such as, “Get Paid What You Are Worth: How To Set The Right Legal Fee,” “Online Strategies To Grow Your Practice in Turbulent Times,” and “How To Attract The Clients You Want Most.” Gideon is a member of the National Speakers Association, and is a former President of its Greater Los Angeles Chapter.
**The Relevant Rules:**

- **Maintaining Client Confidences and Secrets (Rule 3-100):** “A member shall not reveal information protected from disclosure . . . without the informed consent of the client.”
  
  <http://ethics.calbar.ca.gov/LinkClick.aspx?fileticket=wmqECiHp7h4=&tabid=836>

- **Unauthorized Practice of Law (Rule 1-300):** “A member shall not practice law in a jurisdiction where to do so would be in violation of regulations of the profession in that jurisdiction.”

- **Advertising and Solicitation (Rule-1-400):**

- **Business and Professions Code §§ 6157-6159.2 (regulating lawyer advertising):**
  <http://www.leginfo.ca.gov/cgi-bin/displaycode?section=bpc&group=06001-07000&file=6157-6159.2>

**Advertising Basics**

Communications must be:

- True
- Not Deceptive
- No Material Omissions

B& P Section 6158. “In advertising by electronic media, to comply with Sections 61571.1 and 6157.2, the message as a whole may not be false, misleading, or deceptive, and the message as a whole must be factually substantiated. The message means the effect in combination of the spoken word, sound, background, action, symbols, visual image, or any other technique employed to create the message. Factually substantiated means capable of verification by a credible source.

<http://www.leginfo.ca.gov/cgi-bin/displaycode?section=bpc&group=06001-07000&file=6157-6159.2>
Solicitation Basics

- Can’t be transmitted to prospective clients in a coercive manner
- Face-to-face solicitation is the most risky

Some Disclaimers Are Effective:

“A ‘communication’ which contains testimonials about or endorsements of a member [is deceptive] unless such communication also contains an express disclaimer such as "this testimonial or endorsement does not constitute a guarantee, warranty, or prediction regarding the outcome of your legal matter."

B& P Section 6158.3:

In addition to any disclosure required by Section 6157.2, Section 6157.3, and the Rules of Professional Conduct, the following disclosure shall appear in advertising by electronic media. Use of the following disclosure alone may not rebut any presumption created in Section 6158.1. If an advertisement in the electronic media conveys a message portraying a result in a particular case or cases, the advertisement must state, in either an oral or printed communication, either of the following disclosures: The advertisement must adequately disclose the factual and legal circumstances that justify the result portrayed in the message, including the basis for liability and the nature of injury or damage sustained, or the advertisement must state that the result portrayed in the advertisement was dependent on the facts of that case, and that the results will differ if based on different facts.

<http://www.leginfo.ca.gov/cgi-bin/displaycode?section=bpc&group=06001-07000&file=6157-6159.2>

Advertising and Solicitation Through Social Media

- No general social media exception to the Rules. If you can’t do it through other means, you generally do it through social media [e.g., Can’t contact a represented party through Facebook. See SDCBA Legal Ethics Opinion 2011-2 (May 24, 2011) <http://www.sdcba.org/index.cfm?pg=LEC2011-2>. And juror can’t violate judge’s order to keep silent about trial proceedings by blogging about the trial].

- Creating your lawyer profile is safer than answering questions

- Include a disclaimer, even when the effectiveness of disclaimers is in dispute.
Social-Media Rewards/Risks – Including Confidentiality/Privacy:

Articles by Brownstone:

• Business Travel Security Holes – and How to Plug Them, Executive Counsel, at pp. 32-34 (June/July 2011) <fenwick.com/docstore/Publications/EIM/Business_Travel_Security_Holes.pdf> OR <digital.executivecounsel.info/RIDE/(S(lgyjou552uxoo3jxuq002lf0))/viewer.aspx>, at 32-34


Articles Quoting Brownstone:

• Davis, Ryan, Social Networks Could Create E-Discovery Headaches, Law360 (July 7, 2009) <http://technology.law360.com/print_article/109896>


• Vance, Ashlee, Yammer, Chatter, Hot Water; Corporate social networks have advantages—and perils, Bloomberg BusinessWeek (Apr. 28, 2011) <businessweek.com/magazine/content/11_19/b4227031833107.htm>
Social-Media Rewards/Risks (c’t’d)

Articles by Others – Various

• Black, Nicole and Elefant, Carolyn, Social Media for Solos and Small Firms: What It Is and Why It Matters, NYSBA J (Feb. 2011)
  <http://www.nysba.org/AM/Template.cfm?Section=Home&ContentID=46444&Template=/CM/ContentDisplay.cfm>

• Ciria-Cruz, Rene, Sizing Up Social Media, Cal. Lawyer (June 2011)
  <http://www.callawyer.com/story.cfm?eid=916125&evid=1>

• Crusco, Peter A., What Are the Legal and Ethical Standards for 'Web Speech'? N.Y.L.J. (June 30, 2011)
  <http://www.law.com/jsp/lawtechnologynews/PubArticleLTN.jsp?id=1202498939252>

• Dayton, Adrian, Are Some Law Firms Too Big to Blog? (Nat'l L.J. June 30, 2011)
  <http://www.law.com/jsp/lawtechnologynews/PubArticleLTN.jsp?id=1202498937494>

• Foster, Cynthia, Ethics Opinion Tackles 'Friend' Requests Recorder (June 22, 2011)
  <http://www.law.com/jsp/ca/PubArticleCA.jsp?id=1202498241776>

• Hobbs, Meredith, LinkedIn Seminar Addresses Lawyers’ Client Confidentiality Concerns, Fulton County Daily Report (June 30, 2011)
  <http://www.law.com/jsp/lawtechnologynews/PubArticleLTN.jsp?id=1202498918267>

• Karpman, Diane, R u sure u want 2 tweet? Cal. B.J. (May 2011)

• Perry, Joe, Problems With Puffery, Wash [D.C.] Lawyer (June 2011)

• Selsberg, Andy, Teaching to the Text Message, N.Y. Times (March 19, 2011)

• Sloan, Karen, ABA Study of Online Advertising, Nat’l L.J. (July 5, 2011)
  <http://www.law.com/jsp/lawtechnologynews/PubArticleLTN.jsp?id=1202499239424>

  <http://www.law.com/jsp/lawtechnologynews/PubArticleLTN.jsp?id=1202504261671&slreturn=1&hblogin=1>

  <http://www.newyorkpersonalinjuryattorneyblog.com/2010/10/should-lawyers-blog-or-twitter-about-their-cases.html>
**Social-Media Rewards/Risks (c’t’d)**

*Articles by Others – FDA-related:*

- Greenberg & Bederman, *FDA Monitors Drug Company on Social Marketing Sites*, Maryland Injury and Disability Law (Sep. 3, 2010)  

- Jackson, Mandy, *Biotechs Reach for Customers on Social Media Without FDA Guidelines*, DJ (June 8, 2011)  

  [pharmamkting.blogspot.com/2010/08/implications-of-fdas-warning-letter-to.html]

  [www.law.com/jsp/cc/PubArticleCC.jsp?id=1202487907963]

*Additional Resources:*

- COPRAC Ethics Opinion 2004-1996 (regarding communication with potential clients in chat room)  
  [http://ethics.calbar.ca.gov/LinkClick.aspx?fileticket=flbdTW9K1fo%3d&tabid=838]

- COPRAC Ethics Opinion 2001-155) (A website that is not interactive does not constitute a solicitation under Rule 1-400)  
  [http://ethics.calbar.ca.gov/LinkClick.aspx?fileticket=plmCMS3JF5M%3d&tabid=838]

- California Compendium on Professional Responsibility Index:  
  [http://ethics.calbar.ca.gov/LinkClick.aspx?fileticket=0EpOS4vlhsk%3d&tabid=3599]


- IRS, *Circular 230 Tax Professionals* – various materials at  
  [www.irs.gov/taxpros/content/0,,id=175435,00.html], incl. Circular No. 230 (Rev. 4-2008)  
The State Bar of California Law Practice Management & Technology Section (LPMT) enhances the knowledge of its members – and the larger bar – in the areas of

- Law office systems and procedures
- Financial management
- Marketing legal services
- Technology
- Legal ethics

LPMT is the only section exclusively devoted to starting, growing, and maintaining a successful, well-grounded, and ethical law practice.

LPMT members – lawyers and non-lawyers alike – constantly search for ways to improve the practice of law through better use of technology and the best practices in managing firms of all sizes, to create an optimal working environment between lawyer and client as well as among all firm personnel, and to share their insights with others.

LPMT Executive Committee members have broad knowledge and experience in varied areas of law. They wrote many chapters in the essential handbook *The California Guide to Opening and Managing a Law Office* and were instrumental in its publication. Several are national experts on technology and on law practice management. With their diverse background and years of experience, they constitute a singular resource for attorneys across the spectrum, regardless of an attorney’s particular discipline.

In addition to the above, member benefits include:

**Free publications:** LPMT’s flagship publication, *The Bottom Line*, a bi-monthly journal focused on practice management and the use of technology. On alternate months, members receive the *LPMT E-News*, which includes the ever-popular *Tech Tips* feature.

**Free MCLE:** Each issue of *The Bottom Line* contains at least one MCLE article eligible for one hour of credit – **FREE** to all members. Over a year, *The Bottom Line* offers 11 or more **FREE** MCLE hours, including those necessary special MCLE credits.

**Discounts:** Save money on numerous products, seminars, services, and technology trade shows, including offerings from CEB.

**Website:** LPMT’s site includes a members-only area detailing section benefits and providing access to an archive of 30+ years of *The Bottom Line*. [http://lpmt.calbar.ca.gov](http://lpmt.calbar.ca.gov)

**Join:** Go to [http://lpmt.calbar.ca.gov](http://lpmt.calbar.ca.gov) and, on the left, click on Join. Or see the back of this announcement. **For more information, email us at LPMT@calbar.ca.gov**.
LPMT SECTION ENROLLMENT FORM

HOW TO ENROLL: Print this form, fill it out, and mail it with a check or credit card information to: Section Enrollments, The State Bar of California, 180 Howard Street, San Francisco, CA 94105-1639. Or, fax the form to 415-538-2368 (credit card payments only). Newsletters and other Section communications will be emailed to your address of record with the State Bar. For information on how to update your address of record, see Member Profile on the State Bar Home Page.

Name: ______________________________________________________

California Bar Number: _________________________________________

Firm: _______________________________________________________

Street Address: _______________________________________________

City, State and Zip: ____________________________________________

Telephone: ________________________     Fax: ____________________

E-mail address:

ENROLLMENT: Please enroll me in the Law Practice Management and Technology Section:

☐ $75 attorney member

☐ $75 non-attorney member

PAYMENT: Payment of your Section enrollment(s) may be made by check or credit card. Checks should be made payable to the State Bar of California.

CREDIT CARD (Visa/MasterCard only): I authorize the State Bar of California to charge my section enrollment to my VISA or MasterCard account. (No other credit cards will be accepted.)

Account Number: _____________________________________________

Expiration Date: ______________________________________________

Cardholder's Name: ____________________________________________

Cardholder's Signature: _________________________________________

REV SED RDB 7/25/10 WEH 9/20/2010 RDB 12/15/10 AE 7/28/11