

A photograph of four business professionals in a modern office setting. A man in a light blue shirt stands on the left, looking down at a woman seated at a conference table. The woman has dark hair and is wearing a grey cardigan over a white top. She is looking towards a man seated across from her. The man has grey hair and a beard, wearing a blue plaid shirt. A woman with short dark hair and glasses stands on the right, looking at the seated man. On the table are a laptop, a blue mug, and some papers. The background shows large windows with a view of a city.

**2025 WSBA SOLO AND  
SMALL FIRM CONFERENCE**

# COLLABORATION FOR SUCCESS

**FRIDAY, NOV. 7, 2025 - SATURDAY, NOV. 8, 2025**  
Kitsap Conference Center in Bremerton

**WSBA|CLE** *Invested in your success.™*

**IN-PERSON  
ONLY**

2025 WSBA

# SOLO AND SMALL FIRM CONFERENCE

FRIDAY, NOV. 7, 2025 - SATURDAY, NOV. 8, 2025

*Join other solo or small firm practitioners at the 20th annual Solo and Small Firm Conference!*

Co-sponsored with the Solo & Small Practice Section, this program at the [Kitsap Conference Center in Bremerton](#) has been thoughtfully designed to include presentations by industry experts on a variety of topics to help you feel more confident and up-to-date in the management of your practice! Offering 11 total CLE credits, this terrific program provides not just valuable business-related tips, but also an opportunity to network face-to-face with attorneys from around Washington state!

## THANK YOU TO OUR SPONSORS





2025 WSBA

# SOLO AND SMALL FIRM CONFERENCE

FRIDAY, NOV. 7, 2025 - SATURDAY, NOV. 8, 2025

## IN-PERSON ONLY

### REGISTRATION - ONLINE

- #26555BRE: In-Person
- #26555MBRE: In-Person

### 11.0 CLE CREDITS

	Other	Ethics	L&LP	Ethics - Equity
#26555BRE: 2025 WSBA Solo and Small Firm Conference	5.75*	3.25*	2.0	0.75

*\* Depending on your session attendance, credit breakdown will vary with a total of 11 credits for attending the entire program.*

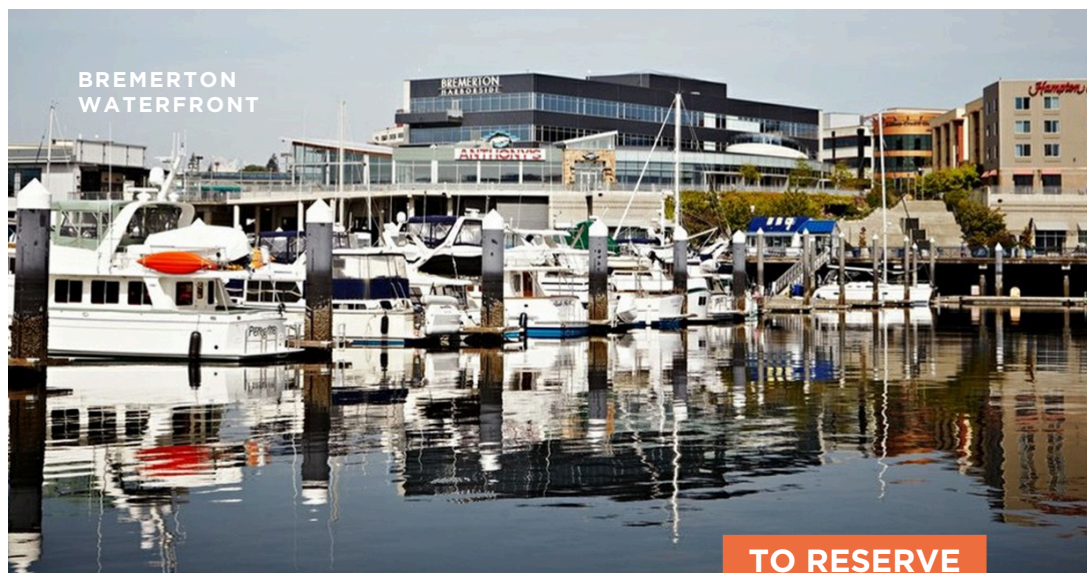
### TUITION

	Early Bird Pricing valid thru 9/30/25	Standard Pricing valid from 10/1/25
Solo & Small Practice Section Members	\$300	\$325
Standard/Non-Section Members	\$335	\$360
Join the Section (+\$35)	\$335	\$360
New Member Price	\$240*	\$265*

PRESENTED IN PARTNERSHIP WITH THE  
**SOLO & SMALL PRACTICE SECTION**

### PLANNING COMMITTEE

- **Michael Cherry** - Bellevue
- **Ann Guinn** - G & P Associates, Kent, WA and Reno, NV
- **Darcel Lobo** - DAL Coaching and Consulting, Normandy Park
- **Tyler O' Brien** - The Longhair Lawyer, Ritzville
- **Kari Petrasek** - Petrasek Law PLLC, Mukilteo



**TO RESERVE  
YOUR ROOM**

## Lodging Information

There is a block of discounted rooms at the Fairfield Inn & Suites and the Hampton Inn & Suites.

The Hampton Inn & Suites offers the option of booking for 1 or 2 nights (Thursday and Friday). The Fairfield Inn & Suites offers only 1 night (Friday) at the group rate. See details at right for each venue. Once they are filled, room prices may increase.

Room reservations made under the WSBA room block are intended for attendees of the Solo and Small Firm Conference only. If a non-attendee would like to stay in the area, please find accommodations outside of the WSBA room block.

**NOTE:** A buffet lunch will be provided Friday and Saturday. Please contact [cle@wsba.org](mailto:cle@wsba.org) if you have any dietary restrictions or concerns.

### Hampton Inn & Suites

150 Washington Ave.,  
Bremerton, WA 98337

\$169.00 USD  
per night, 1 King  
or 2 Queen beds

**Last day to  
book at low rate:**

Wednesday, October 1, 2025

**Scan QR or call:** 877.461.1402,  
use Group ID CHHSAS



### NOV. 7 ONLY

### Fairfield Inn & Suites

239 4th St.,  
Bremerton, WA 98337

\$169.00 USD  
per night, 1 King  
or 2 Queen beds

**Last day to  
book at low rate:**

Friday, October 17, 2025

**Scan QR or call:** 360.377.2111,  
use Group ID SOLSOK





## DAY 1 > FRIDAY, NOV. 7, 2025

9:30 a.m. > Check-in • Walk-in Registration •  
Morning/Afternoon Refreshments

### PRE-CONFERENCE SESSIONS

10:00 a.m. >

#### Mastermind

*120 Minutes, NOT FOR CLE CREDIT*

How would you like to brainstorm ideas with other solo and small firm attorneys who have experience in your journey as a law firm owner? Come join us for a pre-conference mastermind session with other like-minded attorneys. You will have the opportunity to have your obstacles heard, analyzed, and solved by fellow colleagues who have been there and have figured out solutions to the very problem you're facing. Even though we may be solo and small firm owners, we don't have to run our law firms in isolation.

**This session is limited to a maximum of six solo/small firm owners** (owners of a legal practice with no more than 10 licensed legal professionals) and requires preregistration. The objective of the Mastermind session is to have open dialogue about pressing issues in your solo/small practice and problem solve in a group setting. Please note that due to the confidential nature of this workshop, it will not be accredited or recorded.

**Note:** You will be prompted to add the optional preconference Mastermind session to your cart during checkout.

- **Darcel Lobo** - *DAL Coaching and Consulting, Normandy Park*

10:00 a.m. >

#### Bootcamp

*120 minutes, 2.0 credit Other*

In the "Bootcamp: Starting a Solo/Small Firm" session you will have the opportunity to:

- Consider whether solo practice is right for you.
- Gain clarity of your first steps to get going (including what hazards you may encounter!).
- Identify and respond to the fears that are holding you back from going solo.
- Meet others, so you aren't alone!

We look forward to being together in person and hope you can be a part of it.

- **Dean Nathaniel Alterman** - *Alterman Law Group PC, Portland, OR*
- **Ann Guinn** - *G & P Associates, Kent, and Reno, NV*
- **Mackenzie J. Sorich** - *View Ridge Family Law & Estate Planning, Seattle*

## DAY 1 > FRIDAY, NOV. 7, 2025

### 12 p.m. > LUNCH Hosted

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### 1:00 p.m. > Welcome and Introductions by Program Committee

- **Ann Guinn** – *G & P Associates, Kent, and Reno, NV*
  - **Kari Petrusek** – *Petrusek Law PLLC, Mukilteo*
  - **Nick Pleasants** – *Oseran Hahn PS, Bellevue*
- 

### 1:15 p.m. > From Hesitation to Confidence to Efficiency: AI for the Small Legal Office

*60 minutes, 1.0 credit L&LP*

In this session, Lori Byland will introduce you to the world of AI and how it can enhance efficiency in your small legal office. You will gain foundational knowledge and practical tools that will empower you to start integrating AI into your everyday tasks. Discover how to streamline document drafting, conduct legal research more effectively, and enhance client communication, all while freeing up time to focus on what matters most. Lori will guide you through her RECS Framework, which is the key to building successful AI prompts. You will also leave with actionable steps to continue learning and growing your AI skills beyond the conference. This presentation is just the beginning of your AI journey.

- **Lori Byland** – *Executive Assistant & Trainer, Intel Corporation, Portland, OR*
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### 2:15 p.m. > The Ethics of Withdrawing from Representation

*45 minutes, 0.75 credit Ethics*

Learn the ethical issues regarding withdrawal from representation, how to avoid common mistakes, and how to protect yourself and your client as you negotiate this termination of representation.

- **Sandra Schilling** – *Washington State Bar Association, Seattle*
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### 3:00 p.m. > BREAK

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## DAY 1 > FRIDAY, NOV. 7, 2025

### 3:30 p.m. > How to Find Your Community

45 minutes, 0.75 credit Other

For many solo and small firm attorneys, the practice of law can feel isolating, overwhelming, or competitive. Attorneys might realize that growing and sustaining a professional community is vital to their long-term success and well-being, but they also might not feel like they have the capacity to foster those relationships. This panel will examine mentoring and community-building from multiple vantage points—mentee, mentor, and peer—and offer strategies for creating networks of support that fuel professional and personal growth.

- **Christopher Fargo-Masuda** will provide a mentee's perspective, discussing the role of active observation in identifying potential mentors and the importance of contributing meaningfully to mentoring relationships.
- **Stan Perkins** will offer insights from the mentor's perspective and his time developing Seattle University School of Law's Incubator Program. He will address the variety of mentoring models (e.g., practice-specific, business development, and coaching) and the benefits of mentoring, including to mentors themselves—while dispelling myths about time commitments and seniority.
- **Carrie Griffin Basas** will explore nontraditional approaches to relationship-building and community, emphasizing the role of peer support and identity-based connections, including networks for attorneys with disabilities.

As time allows, the panel will invite audience questions and reflections about developing thriving and meaningful professional connections.

- **Christopher GM Fargo-Masuda Esq.** - *Fargo-Masuda P.C., Mercer Island*
- **Carrie Griffin Basas Esq.** - *Justice Studio, Seattle*
- **Dean Standish "Stan" Perkins** - *Dean Standish Perkins & Associates, P.S., Seattle*

### 4:15 p.m. > Open Minded: Practicing through Culturally Humble Lens

45 minutes, 0.75 credit Ethics - Equity

A successful client attorney relationship isn't solely reliant on the outcome of the case. Forming a successful relationship is coupled with communication, building rapport, and self-awareness. Today's presentation will help you understand how to apply cultural humility in your practice of law allowing you to recognize the challenges, identify relationship building skills, and improve your communication.

- **Sunitha Anjilvel** - *Anjilvel Law Group, Redmond*
- **Adely Ruiz** - *Washington State Bar Association, Seattle*
- **Diana Singleton** - *Washington State Bar Association, Seattle*

### 5:00 p.m. > Reception | 6:00 p.m. > Dine Around

## DAY 2 > SATURDAY, NOV. 8, 2025

### 8:30 a.m. > Welcome and Introductions

- **Ann Guinn** – *G & P Associates, Kent, and Reno, NV*

## FIRST MORNING SESSIONS

### 8:45 a.m. >

## How to Build a Book of Business

45 minutes, 0.75 credit Other

During this session, we'll cover a variety of cost-effective channels that have proved to be particularly effective for the small/solo practitioner as well as bar minimum technical infrastructure required to effectively manage marketing and intake efforts.

- **Conrad Saam** – *Mockingbird Marketing, Issaquah*

### 8:45 a.m. >

## How to Navigate a Multi-jurisdictional Practice

45 minutes, 0.75 credit Ethics

At what point does representation require a state-specific license? What are the common pitfalls of multi-jurisdictional practice for litigators and transactional attorneys? How do you manage compliance with numerous bar organizations and state agencies? Join us for an overview of challenges commonly encountered in multi-jurisdictional practices.

- **Tyler O' Brien** – *The Longhair Lawyer, Ritzville*
- **Shea Meehan** – *Consult with Shea, PC, Portland, OR*





## DAY 2 > SATURDAY, NOV. 8, 2025

### SECOND MORNING SESSIONS

9:35 a.m. >

#### Tough Lawyers, Smart Strategies — Turning Tension into Triumph: Navigating Difficult Attorneys

45 minutes, 0.75 credit Other

Every lawyer has faced “that attorney” — the one who stonewalls, nitpicks, or thrives on conflict and confusion. Instead of letting difficult personalities derail your work, learn how to flip the script. This session will equip you with smart, practical strategies to stay calm, build resilience, and turn tension into opportunities. We’ll uncover communication techniques, boundary-setting and problem-solving to help you remain effective — even when opposing counsel (and sometimes colleagues) are not. Through real-world examples and actionable tools, you’ll learn how to manage conflict, protect your client’s interest, and turn frustrating encounters into professional wins. Walk away with tools not to just survive tough lawyers, but to thrive in the challenge.

- **Rea Culwell** – *Moberg Law Group, P.S., Ephrata*
- **Jerry Moberg** – *Moberg Law Group, P.S., Ephrata*

9:35 a.m. >

#### Online Resources to Improve Client Service

45 minutes, 0.75 credit Other

This session explores practical online tools and platforms that solo and small firm lawyers can use to enhance client service —from streamlining communication and document sharing to improving accessibility and responsiveness. Attendees will leave with actionable resources to boost efficiency, strengthen client relationships, and stay competitive in a digital-first legal landscape.

- **Jordan Couch** – *Palace Law Offices, University Place*
- **Shreya Ley** – *LayRoots, Seattle*

10:20 a.m. > BREAK

## DAY 2 > SATURDAY, NOV. 8, 2025

### 10:45 a.m. > High Stakes Ethical Challenges Faced by Lawyers

45 minutes, 0.75 credit Ethics

Two WSBA Managing Disciplinary Counsel discuss common ethical challenges that Solo and Small Firm practitioners may face. Learn the ethics rules for tricky situations and how to avoid others' mistakes.

- **Francesca D'Angelo** – *Washington State Bar Association, Seattle*
- **Erica Temple** – *Washington State Bar Association, Seattle*

## THIRD MORNING SESSIONS

11:35 a.m. >

### Tips for Successful Mediations

45 minutes, 0.75 credit Other

This session will discuss concrete steps you can take both before a mediation (whether to mediate, timing of mediation, selecting a mediator, preparing your client, mediation submissions), and during a mediation (opening offers, negotiation strategies, division of responsibilities between you and your client) to ensure that you are maximizing your effectiveness as an advocate in the mediation process.

- **Dean Lum** – *JAMS, Seattle*
- **Sasha Philip** – *Philip Mediation, Kenmore*

11:35 a.m. >

### Do You Have the Right People at the Table?

45 minutes, .75 credit Other

Representing your clients to the best of your ability can sometimes mean bringing in others to help. Collaborative law attorneys have long known the value of incorporating other experts into their work on behalf of clients; but, outside expertise can be helpful to other practice areas, as well, such as litigation, estate planning, PI, etc. So, who can help you win for your client? Learn how two seasoned attorneys determine who they need at the table, and identify how to find them.

- **Jordan Couch** – *Palace Law Offices, University Place*
- **Teanini Joanna Roth** – *Family Transition Center, Seattle*

### 12:20 p.m. > LUNCH Hosted



## DAY 2 > SATURDAY, NOV. 8, 2025

### AFTERNOON SESSIONS

1:00 p.m. >

#### Getting More Out of the Tech You Already Use

45 minutes, 0.75 credit Other

Small adjustments to the tools you already use can make a surprising difference in efficiency and peace of mind. In this session, we'll explore simple ways to get more out of your existing technology, including practical automation ideas and hidden features that save time. The focus will be on realistic steps for solo and small firm lawyers—changes you can start using right away. Expect an interactive session with plenty of examples and leave with at least one tip you'll want to put into practice before you even get back to the office.

- **Margeaux Green** – *Washington State Bar Association, Seattle*

1:00 p.m. >

#### Personnel: You Hired Them, Now What?

45 minutes, 0.75 credit Other

A small firm does not have an HR Department, but it may have decades of unspoken tradition or just a way of doing things that are not obvious to newcomers. How do you convey knowledge, set expectations, and make this employee a productive, useful, and happy asset to a small firm? Technology, culture, and human leadership all have an important role to play in a successful and lasting onboarding, especially in an era with great generational culture differences. The Whatcom Law Group went from 4 people to 10 people in a short time period; Rajeev will share the helpful lessons learned and how success was achieved for his firm.

- **Rajeev Majumdar** – *Whatcom Law Group, P.S., Blaine*



## DAY 2 > SATURDAY, NOV. 8, 2025

### 1:45 p.m. > Collaborating for Success: Judicial Insights for Solo and Small Firm Lawyers

60 minutes, 1.0 credit L&LP

Solo and small firm practices thrive on resourcefulness—but in today's legal environment, resourcefulness is best paired with collaboration. In this interactive session, three Washington judges will share practical strategies for how attorneys can work together—both with opposing counsel and with the courts—to resolve issues like discovery and scheduling disputes more efficiently, reduce client costs, and achieve better outcomes. Additionally, the discussion will focus on how recent developments in technology could facilitate a collaborative process between opposing counsel to resolve case related issues without involving the Court.

The judges will offer insights on what collaboration looks like from the bench, highlight examples of practices that reduce friction and wasted resources, and provide some “out of the box” ideas about how generative AI tools may assist solo and small practice lawyers avoid costly pretrial hearings and even settle cases.

- **Judge David G. Estudillo** – *The United States Court House, Tacoma*
- **Judge Christine Frausto** – *Tulalip Tribal Court, Tulalip*
- **Judge Christon Clark Skinner** – *Island County Superior Court, Coupeville*

### 2:45 p.m. > BREAK

### 3:15 p.m. > Legal Ethics in 2025 and Beyond for Solo and Small-Practice Lawyers

60 minutes, 1.0 credits Ethics

This presentation will share current and forward-looking legal ethics updates for lawyers who practice in solo and small-practice contexts. Ethics and technology will be explored, with broader insight than warnings about AI hallucinations, including resource considerations, confidentiality, fees, communication, and competence. The role of bias and harassment in law practice also will be addressed, aligning important recent formal ethics opinions from the American Bar Association with lawyers' obligations under the Washington RPC. The presentation further will flag selected recent Washington Advisory Ethics Opinions that offer helpful insight for lawyers in solo and small-practice for maintaining an ethical law practice.

- **Professor Brooks Holland** – *Gonzaga University, School of Law, Spokane*

### 4:15 p.m. > Adjourn • Complete Online Evaluations



# 2025 WSBA Solo and Small Firm Conference

Friday, Nov. 7, 2025 - Saturday, Nov. 8, 2025 • #26555BRE & #26555MBRE

## REGISTRATION

**ONLINE** > Go to [www.wsba.org](http://www.wsba.org) and enter **26555BRE** in the search box. Payment by credit card.

**PHONE** > Call **800-945-9722** or **206-443-9722** with credit card and registration/order form in hand. Our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions.

**MAIL** > Please fill out this registration form and mail to WSBA seven business days prior to the program along with your check payable to WSBA. Credit card payments by mail or fax are no longer accepted.

Name: \_\_\_\_\_ WSBA #: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: ( ) \_\_\_\_\_ Email: \_\_\_\_\_

☐ Please omit my name from the networking list made available to exhibitors and/or attendees.

Registrations received less than 48 hours before a seminar are not guaranteed a coursebook or other presentation materials on-site. If special accommodations are needed, please email [cle@wsba.org](mailto:cle@wsba.org) or call toll-free at **800-945-9722**.

### PRICING AND PAYMENT

#### START-UP BOOTCAMP

☐ **#26555BRE, attend in Bremerton**  
11/7/25 through 11/8/25

#### MASTERMIND SESSION

☐ **#26555MBRE, attend in Bremerton**  
11/7/25 through 11/8/25

SELECT PRICE	Early Bird Pricing valid thru 9/30/25	Standard Pricing valid from 10/1/25	
	<input type="radio"/> \$300	<input type="radio"/> \$325	Solo & Small Practice Section Members
	<input type="radio"/> \$335	<input type="radio"/> \$360	Standard/Non-Section Members
	<input type="radio"/> \$335	<input type="radio"/> \$360	Join the Section (\$35) and register at the Section member rate (\$325)
	<input type="radio"/> \$240	<input type="radio"/> \$265	New Members*

\*Active members of the Washington State Bar Association will be considered New Members through the calendar end of the tenth year following admittance to practice in the state. The store will automatically discount registration, if applicable, during checkout.

#### Registration Transfers, Refunds & Cancellations:

In most circumstances, if you cannot attend the live event, we can transfer your registration to the on-demand product, once available (8-10 weeks from the program delivery date). For in-person registrations, tuition fees may be refunded, less \$25 for processing, for written cancellations postmarked, emailed, or faxed by 5 p.m. up to three business days before the event. No refunds will be provided after the dates specified. You may also send a substitute in lieu of canceling. When applicable, specific exceptions to these policies will be noted on individual event registration pages. Please email [cle@wsba.org](mailto:cle@wsba.org) with any requests or questions.

**Registration after Sept. 30 May Incur New Washington Sales Tax:** Effective Oct. 1, 2025, sales tax may be applied to all live seminar registrations (in-person or virtual). For more information, refer to changes to [Washington sales tax law](#).

☐ **Check enclosed**, payable to "WSBA" for the amount of \_\_\_\_\_

**MAIL TO:** Washington State Bar Association, 1325 Fourth Ave, Suite 600, Seattle, WA 98101-2539

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