

**New Lawyer's Subcommittee
Trust & Estates Section of the CBA**

Minutes for March 17, 2016

CBA Offices – 9th Floor – Terrace Room

A. Welcome & Introductions

1. Attendance:

- Lauren da Cunha
- Bob Hercher
- Sarah Pheral
- Angela Hopkins
- Gina Trevey
- John Estes
- Sara Dietz
- Rachel Sheikh
- Mark Masters
- Kerri Klein
- Jennifer Spitz
- Arlene Barringer
- Kim Raemdonck
- Rikke Liska

B. Review and Approve Minutes from February 18, 2016 Meeting

- Motion was seconded and passed unanimously

C. Panel discussion with Jennifer Spitz, Kerri Klein & Arlene Barringer on the subject of work-life balance while raising a family and practicing law.

- Estate planning is a great practice to have some flexibility (i.e. working from home)
- Different practices work for different people—depends on your situation. Here are some ideas--
 - Planning a calendar in advance and including family and kid events on work calendar to try to schedule around and avoid conflicts
 - Schedule a day for “me time” to catch up on the non-work work
 - Learn to say “no” to things and not overcommit
 - Don’t compare yourself to others

- This is not a practice where you have to respond immediately, so it is okay to put work away when you leave the office
 - Alternatively, having the flexibility to work remotely at home in the evening (after bedtime) can be beneficial and a way for you to make time for other things during the day
 - Set aside time to disconnect (i.e. take email off phone, put phone and all devices away for a certain amount of time)
 - Hire a contract person for help—assistant or paralegal—if you are on your own
- In a small firm environment, know the expectations of the partner, do a good job to meet that expectation and make yourself an asset. Once you are an asset, then you will be able to have more flexibility and having to leave won't be as noticeable if you are getting the job done
- That being said, if you are working at a firm where there is no work-life balance and you are unhappy, reevaluate/reassess and try to find a better fit
- How do you find the right fit?
 - Get out there and network
 - Don't just go to meetings, but be on committees and help out
 - Contact local practitioners for lunch and coffee and ask questions
 - Find volunteer opportunities—
 - local counties offer pro-bono opportunities so get on the list
 - be a court visitor
 - courthouses offer clinics to the public
- Parental leave
 - 12 weeks unpaid plus tacking on sick/vacation
 - Hard on the firm too, so it is a difficult situation for both parties
 - 6 weeks paid—flexibility
 - Work it out in advance, but keep in mind that employers are stuck and are hesitant to make a concession for one employee because they have to make concessions for everyone
- Know the expectation of the partners/owners/bosses
 - If you have the vacation, is there an expectation that you would take it? Or is the expectation not to take it
 - But when you are there, be present and be productive
 - Try to get in the mindset of an owner, don't just punch the clock
- Resources
 - Mom's Group – Denver or Colorado Bar Association (Denver MAMA)
 - Network of working moms
 - Books
 - Use friends and carpools
- Best moment in career is realization that I didn't need to do it all—I could just do one thing or the areas I liked the best
 - Say no and refer business out
 - You can limit your practice areas and your time (part-time)
- Tips for solos - stay organized and be efficient

- Setting goals – daily, weekly, monthly
- “Only Touch a Paper Once” – clutter-free
- Add tasks to your calendar and limit amount of time for certain tasks
- Recognize that things are sometimes difficult, but not always so focus on the positive when you are in the tough times
- Self-care is important
- Business development/Marketing
 - find financial planners for referrals and send them back clients
 - trust officers are a great resource as well

D. Ambassador Program

- Sign-up sheet circulated for new lawyers who want to be mentored through the program

E. Upcoming CLEs

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| 1. Winning Presentation Skills | Wed, March 30, 2016 |
| • 3 General Credits | |
| 2. Probate Litigation Practicum: T&E Spring Update | Fri, April 8, 2016 |
| • 6 General Credits | |
| 3. Estate Planning Retreat | June 9-11, 2016 |

F. Study Group Update (1st Thursday of each month from 12-1 PM)

G. Client Conundrums

H. Adjourn