

Establishing Professional Relationships: Contract, Of Counsel & Co-Counsel Legal Services

This 1 1/2 hour CLE program will provide guidance to solo and small law firm owners on creating contract, of counsel and co-counsel professional relationships, both as an attorney offering legal services and the engaging law firm.

- Speakers will cover matters both parties should address when contemplating such relationships, including economic considerations, compliance with Rules of Professional Responsibility, and situations that could give rise to malpractice claims.
- This session will also outline how to ensure the provision of legal services is not later deemed an employer/employee relationship - and the consequences from the failure to create or maintain a contractual relationship.
- Course materials will include sample agreements and provisions and reference checklists.

This home study is worth 2 general CLE credits and 1 ethics credit. This program is accredited for 2 calendar years, so it will expire on March 19, 2023.

Please email Ashley Staab at astaab@cobar.org to get the video, materials and home study credit.

Speakers:

- **Ariane Parisi:** Ariane is a Colorado native who moved to New York for law school. She began her career in a small Manhattan Plaintiffs' firm that specializes in Legal Malpractice and Personal Injury claims. After moving home to be close to elderly parents, Ariane started a per diem practice in Denver as she saw a need for that type of support in the Denver Legal Community.
 - This speaker will discuss establishing professional relationships from the viewpoint of: a Per Diem (Stand-in) Attorney
 - As materials for attendees, this speaker will provide sample documents /a checklist for: Discussing fees, relationship with the client, and what documents / information needed to appear effectively in the matter
- **Heather Jackson:** Heather Jackson is the Managing Attorney of Colorado Injury Law Center, a private law firm dedicated to client centered advocacy where she brings years of industry experience as a Claims Adjuster to help maximize her clients' insurance recoveries, both with and without litigation. A 2013 graduate of the University of Denver Sturm College of Law, Heather is admitted to practice in both the State and Federal Courts in Colorado. In addition to her membership and contributions to the Colorado Women's Bar Association, Heather is active in both the Rhone Brackett and Ben S. Wendelken Inns of Court, in the Colorado Trial Lawyers Association, Women's Trial Lawyers Network, Colorado W.O.L.F (Women Owned Law Firms), Denver MAMAs, and El Paso County and Colorado State Bar Associations.
 - This speaker will discuss establishing professional relationships from the viewpoint of: AN ATTORNEY WORKING IN OF COUNSEL & CO-COUNSEL CAPACITIES
 - As materials for attendees, this speaker will provide 1 sample document for: OF COUNSEL & CO-COUNSEL WORKING RELATIONSHIPS
- **Brynne Gant:** Brynne moved to Colorado while studying for the bar and with no specific work prospects. After passing the bar, she obtained her first-choice job as a Weld County Deputy District

Attorney where she worked for nearly four years handling over 40 jury trials, including everything from misdemeanor traffic to child homicide. With a passion for innovation, creativity, ethics, flexibility, and helping families, Brynne left the DA's office and ventured into private practice, eventually starting her own firm focusing on Probate/Protective Proceedings and Family Law.

- This speaker will discuss establishing professional relationships from the viewpoint of: the hiring attorney/firm owner
 - As materials for attendees, this speaker will provide sample documents/a checklist for: hiring interview, contractor agreement and memo for requested tasks
- **Margrit Parker:** Margrit Parker of Lent Parker Law LLC serves her clients in business, estate planning, and license defense, with a special interest in working with health care, legal, and veterinary professionals, and horse industry businesses and professionals. Prior to forming Lent Parker Law LLC, Margrit spent a decade defending lawyers and health care professionals in malpractice and licensing claims. Margrit is a graduate of CU Law School and completed clerkships with Magistrate Judge William Beaman of the US District Court for the District of Wyoming and Chief Justice Mary Mullarkey of the Colorado Supreme Court.
 - This speaker will discuss establishing professional relationships from the viewpoint of: Ethical / Professional Rules of Responsibility considerations, malpractice issues
- **Abby Dvorkin:** Abby Dvorkin is a contract attorney providing services to firms in the Denver area. Abby has experience litigating complex business disputes, property issues and construction matters. Abby's construction law experience includes payment disputes, representing owners and contractors in defect cases and defending design professionals against malpractice claims. Abby also negotiates drafts and contracts on behalf of owners and developers and design professionals.
 - This speaker will discuss establishing professional relationships from the viewpoint of: a Contract Attorney.
 - As materials for attendees, this speaker will provide sample documents/a checklist for: Terms to include in your Independent Contractor Agreement, topics to discuss with firms you will provide services for and tips on how to manage your work/business.
- **Karen Kishbaugh:** Karen partners with business owners and in-house legal teams to provide high performing corporate contracts, outsourced legal services, and strategic advice for day to day operations and project development. After receiving her geology degree at Penn State, Karen and her German Shepherd Dog moved to Colorado where she received her law degree from the University of Denver College of Law. Before having her own firm, she practiced environmental law as a Colorado Assistant Attorney General and worked as in-house counsel for engineering, franchise, and oil and gas companies.
 - This speaker will discuss establishing professional relationships from the viewpoint of: Contract attorney
 - As materials for attendees, this speaker will provide sample documents /a checklist for: contract provisions and/or a checklist as assigned.
- **Barb Heikoff:** Barb has nearly 30 years of experience in commercial and residential transactional real estate law, representing clients in a full range of real property and related business matters. Before becoming a solo law firm owner, she experienced working for mid and large law firms and as in-house counsel. After opening her own solo practice, she has worked as a contract attorney for differing sized firms and as of counsel for another solo law firm, all while maintaining and growing her own law firm and client base.
 - This speaker will discuss establishing professional relationships from the viewpoint of: the engaged Of Counsel attorney
 - As materials for attendees, this speaker will provide sample documents /a checklist for: Of Counsel Agreements