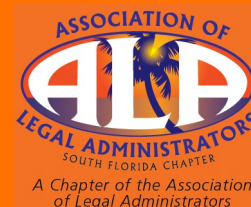


INTEGRATING KNOWLEDGE AND CONNECTIONS

The Network



Volume XIII - Issue 2

ALA MISSION

The Association of Legal Administrators' mission is to:

Promote and enhance the competence and professionalism of all members of the legal management team;

Improve the quality of management in law firms and other legal service organizations; and

Represent professional legal management and managers to the legal community and to the community at large.

CLM in 5 Easy Steps

Thinking of getting your CLM? Here is a quick checklist for getting started.

1. Download the [CLM Application Packet](#)
2. Determine if you meet the [Experience & Employment Prerequisites](#)
3. Fulfill the [Education Requirements](#)

All candidates must complete, within the 24 months preceding the date of application, at least 2 hours of course work in each of the five (5) Management Categories.

4. Determine [when you will take the test](#)

The next application deadline is September 9th, 2013 for the test date of November 18th, 2013. You can now take test at a local testing center.

5. [Submit the Application](#)

For more information please visit the [Chapter's CLM Coaching Page](#). You'll find a list of Chapter CLMs that will answer questions and provide support for preparing for the exam.



AVAILABLE ONLINE NOW AT
THE ALA BOOKSTORE!

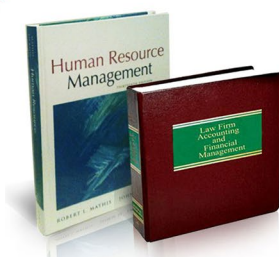
CLM Book Bundles

Enhance your preparation for the CLM Exam

Enhance your preparation for the Certified Legal Manager exam with these two Bundles of CLM recommended study resources:

Book Bundle A: *Law Firm Accounting and Financial Management, Fifth Edition* and *Human Resource Management, 13th Edition*.

Book Bundle B: Four additional CLM recommended texts on selected topics within the Legal Industry/Business Management and Financial Management.



Available from the ALA Bookstore — www.alanet.org/bookstore

Bundle A — Member \$495.00 Nonmember—\$579.00

Bundle B — Member \$265.00 Nonmember—\$319.00

Your connection
to knowledge, resources and networking

Add CLM in a Flash for only \$60.00! Save \$9.95!



Table of Contents

FEATURES

CLM in 5 Easy Steps.....	1
Three-step approach to reducing your tax bill and saving more for retirement	6
Scholarship Drive: 2013-2014	10
Equipment Purchases: New Tax Incentives for 2013	13

IN EVERY ISSUE

President’s Message.....	4
Member Spotlight.....	12
Board and Committees	16
Calendar of Events	16

The Network is published to provide information for the education and benefit of legal administrators, law office managers, managing partners of law firms and others interested in law firm management. Any article or advertising published here or in any prior issue of this newsletter should not be considered to be an endorsement by the South Florida Chapter of the Association of Legal Administrators of the opinions expressed therein or any products(s) advertised. Contributing writers are asked to disclose interests and affiliations that may influence their writing position so that those facts may be obtained upon request.



THE SOUTH FLORIDA CHAPTER THANKS
OUR 2013 BUSINESS PARTNERS
FOR THEIR CONTINUED SUPPORT

- | | |
|--|--|
| ABA Retirement Funds Program | Kouwenhoven & Associates |
| Affinity Consulting Group | Legal Search Solutions |
| Aramark Refreshment Services | New Global Solutions, Inc. |
| Attorney at Law Magazine | Nuance Corporation |
| Beltmann Relocation Group | Orange Legal |
| Burke Process Service | OTS Legal |
| Cintas Document Management | Personnel Management Solutions, Inc. |
| Control Systems Copitrak | Ricoh USA |
| Cort | Robert Half Legal |
| Cresa Partners | Royal Cup, Inc. |
| Daily Business Review | R & R Office Supplies |
| DLE Process Servers | Sabadell Bank |
| Document Technologies (DTI) | Sanford Barrows Group |
| EC Purchasing | Services On Site |
| The Gourmet Coffee Co. | Solomon Search Group |
| GRM Information Management Services | Special Counsel |
| Harvey Bilt Photography | Strategic Professional Staffing & MyMotionCalendar.com |
| Herbert L. Jamison & Co., LLC | Studley |
| International Data Depository | Synergy Creative Group |
| Iron Mountain Information Management | U.S. Legal Support |
| IST Management Services | UPS |
| Kahn-Carlin & Co., Inc. | Western Digitech |
| Kelly Law Registry | |



PRESIDENT’S MESSAGE

Paula J. Lawson, CLM

Genovese, Joblove & Battista, P.A.

Relevant: bearing upon or connected with the matter in hand; pertinent.

How do you stay relevant? Never has this been more important than when the Supreme Court of Florida mandated electronic filing as of April 1, 2013. How did the South Florida Chapter of the Association of Legal Administrators provide relevancy? The Chapter brought immediate, high-quality training on e-filing to our membership and their staff members. As President of the South Florida Chapter, I want share some of the many ways that being a member of this organization keeps me relevant.

Over 14 years ago, when my small 10-attorney firm merged with an 11-attorney bankruptcy firm, I found myself struggling with growing HR issues. One of the partners, John Genovese, mentioned he had heard about an “organization of legal administrators” and suggested I join. This was one of my first steps at becoming and staying relevant as a legal administrator.

Four years later, I became a Certified Legal Manager (CLM), continuing on my mission to stay relevant. Vicki Smith-Bilt and Claudia Hoffman, both already

CLMs, were determined to promote the CLM program within our Chapter. Vicki organized an information meeting at her office where about ten of us met to learn more about becoming a CLM. Five of us decided to form a weekend study group since we all lived in Central and South Broward County. The five of us studied every other Saturday morning for about 8 months. I know for certain I would not have passed the CLM exam without the help of this study group.

As members of this international organization and this local chapter, you have the opportunity many times each month to stay relevant. We hold two monthly educational lunches each month (one in Broward County and one in Miami-Dade). The Chapter also sponsors monthly ALA’s webinars, which are also held in convenient locations in each of the counties.

All professionals must fulfill continuing education. CLMs must also fulfill 36 hours every 3 years in relevant, legal administrative topics. Your current Board of Directors, composed entirely of CLMs, is committed to offering relevant educational topics for its members. In addition to the local Chapter’s educational

offerings, every Regional Conference and Annual Conference offers a wealth of educational opportunities. These are all designed to keep you relevant.

Reading only the listserve will not keep you relevant. How often do you see the same questions asked repeatedly? Building a personal network of professionals, ones you can trust and relate to, far surpasses receiving a couple of responses from people you may or may not know on the listserve. Do you know the administrators to firms that have similar practice

areas of law as yours? Do you know the administrators of firms that use similar applications as you? Do you know the administrators of firms that are similar in size to yours? If not, why not? Attending the monthly chapter meetings is a great way to form these important face-to-face relationships.

Reach out to our business partners and your vendors. They are experts in their products and services. They serve the legal community and must stay relevant or they will be out of business. Listen to what new processes or products are out on

the market place. Your vendors go far in helping to keep you relevant.

So, we come back to my question to you. How do you stay relevant? I invite each of you to reach out to one of the board members or committee chairs to get involved in our local chapter. Attend some of the many offerings of the South Florida Chapter of ALA. Check out the ALA website (www.alanet.org) and South Florida ALA website (www.alasofla.org) for all the educational opportunities ALA has to help you stay relevant.

Paula L. Lawson, CLM
President

My Managing Partner just walked into my office and needs:

Where do you begin?

At the Association of Legal Administrators (ALA) we understand that when you need information, you want it quickly and from a reliable source.



Put your ALA membership to work for you!

ALA Management SolutionsSM offers you access to a competent, experienced team of researchers — and it's FREE to ALA members! Just tell us what you need; we'll respond quickly with the best information available.

Send your questions to infocentral@alanet.org, or call 847.267.1385.

Your connection
to knowledge, resources and networking



Three-step approach to reducing your tax bill and saving more for retirement

By ABA Retirement Funds

We've all heard that old adage that the only certain things in life are death and taxes. Gallows humor aside, paying more than you have to in income taxes is not entirely inevitable. We discuss three common ways to help temper your annual tax burden so that you can save more for your retirement.

1. Contribute to a 401(k) Plan

If you participate in a 401(k) plan, one of the advantages is that your payroll contributions may lower your taxable income, either now or in the future. As you may already know, there are a few methods by which to contribute to your retirement plan: on a pre-tax, an after-tax basis, or a combination of both.

In a traditional 401(k) plan arrangement, your contributions are taken out of your salary on a pre-tax basis—that is, you contribute to your retirement savings before state and federal governments take their share of the rest. Your contributions then grow tax-deferred, which means you don't pay taxes on them until you withdraw money from your account, typically in retirement.

The tax benefit of making a traditional pre-tax contribution is the reduction of your taxable income today. This may be advantageous

to a saver that is currently in his peak earnings or highest tax bracket years. At retirement, you may be earning less money, and therefore be taxed at a lower rate than that would be today. The challenge is that salaries and tax codes are not set in stone, and there's no way to predict what these will be for you—or how your investments will perform until you retire.

Another tax advantaged option to funding a 401k plan is by electing an after tax choice, such as Roth. Roth 401(k) contributions allow a participant to defer his tax payments to retirement. While you will get no deduction up front, your money can be saved year over year in a tax deferred account and when you reach retirement you can withdraw your contributions and earnings tax-free. There are a few conditions to this, however: withdrawals generally must be made after you've reached age 59½ and you must have had your Roth 401(k) account for at least five years.

Choosing Roth 401k may be advantageous to a saver at the beginning of his career, for those making a relatively modest salary, or for those expected to make significantly more in the future. These savers may benefit from

having a lower tax bracket today paying taxes now. In addition your plan investments may grow over the course of your working years which would also be tax free at retirement. While this may seem like an attractive option to many, it's important to consider the Roth rules. If you want to withdraw your savings before the five-year holding period, or before you attain age 59½ you may be taxed and penalized. Additionally, future investment performance, salary levels and tax brackets are not predictable.

Combining pre-tax and after-tax contributions is a potential third option that could maximize the benefits of each choice for certain periods of time. If you have a pre-tax rollover 401(k) where you've consolidated traditional accounts from previous employers, you may choose to utilize a Roth contribution going forward to diversify your tax position. Again, it is always recommended that you seek the advice of a tax professional to determine the savings method that is best for your personal situation.

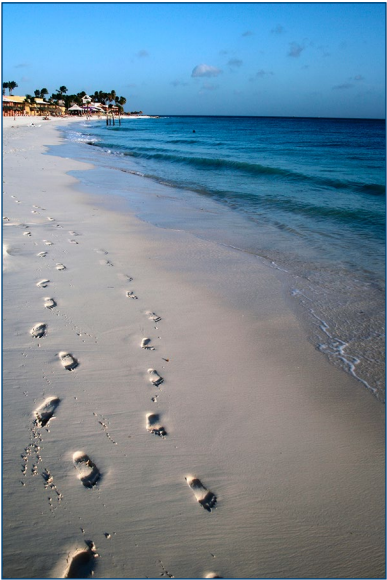
2. Use Tax Deductions and Credits

Tax deductions and credits can be used together to lower your overall tax burden. They are used differently.

First, tax deductions lower your taxable income, thereby reducing the amount of money you're taxed by the government. You may be able to deduct from your taxable income:

- Medical expenses, to the extent they exceed 7.5% of your income;
- Homeowner deductions for mortgage interest and

- property tax bills; and
- Business or personal expenses such as the costs involved in running a side or home business; or
- Charitable donations.



In general, the following items may be used as a tax credit. The amount of the tax credit is applied to your tax bill to lower it:

- Child tax credits for children under 17, if you do not exceed adjusted gross income limits;
- Education credits for your children or yourself if you meet —qualified studentll guidelines and do not exceed adjusted gross income limits;
- Child and Dependent Care credit for children or adult dependents if you do not exceed adjusted gross income limits; and
- Energy-Saving credit for efficient furnaces, water heaters, air conditioners and solar panels in your principal residence.

As the rules and credit amounts change from year to year, you should discuss these issues with a tax attorney or accountant.

3. Choose the Proper Withholding

Getting a significant refund back on your taxes may mean you're having too much withheld from each paycheck, essentially giving the government a free loan on your money. Sure, it's nice to have no tax liability, but this is also money you could have used to invest in your future. Decreasing your tax withholding is an easy way to increase your contribution to your 401(k) plan by a percentage or two. It's money you're already not using or spending. In fact, you may be surprised how saving just 1% more could positively impact your retirement savings over a long period of time.

While this three step approach may prove beneficial to most, you should always consider your specific situation and seek personalized guidance on this complex topic by consulting with your tax professional.

Press inquiries:
Bradley Blewett
Associate Executive Director
ABA Retirement Funds
Office: 312.988.5854
Bradley.blewett@americanbar.org

About the ABA Retirement Funds
The ABA Retirement Funds, an affiliate of the ABA, is dedicated to helping lawyers with their retirement by providing fully bundled retirement solutions for law firms of all sizes. Established in 1963, the organization has nearly 3,800 plans, 37,000 participants, and more than \$4 billion in assets in the ABA Retirement Funds Program (www.abaretirement.com). The information in this article is believed to be reliable. However, this newsletter is distributed with the understanding that the Program is not engaged herein in rendering legal, tax, accounting, investment management or other professional advice.





2013 Board of Directors

We are happy to announce the following individuals have been voted into positions on the Board. From left to right are:
Director - Victoria Allen, CLM; Secretary – Nadean Stone, CLM, MBA;
Director – Lisa Dasher, CLM, CPA; President – Paula Lawson, CLM;
President Elect– Vicki Smith-Bilt, CLM, SPHR; Vice President Membership – Judith Pawloski, CLM. Not pictured: Treasurer – Carole Sheets



APRIL LUNCHEON



THANK YOU TO OUR HAPPY HOUR SPONSORS:
LEGAL SEARCH SOLUTIONS AND U.S. LEGAL SUPPORT



Scholarship Drive: 2013-2014

Carole M. Sheets, Scholarship Committee Chair

For the past 35 years, members of the South Florida Chapter Association of Legal Administrators, their firms and local business partners have supported the Chapter’s scholarship program. This program targets graduating high school students and undergraduate college students in our area. The Applicant, at the time of making application, must be an on-going full or part-time employee or the dependent or spouse of an on-going full or part-time employee of a law firm or branch in Miami-Dade or Broward County that has a representative in good standing in the South Florida Chapter of Legal Administrators. In light of increasing college costs, our scholarship awards are eagerly sought after and gratefully accepted by deserving students. The Chapter was able to meet their goal for the 2013 – 2014 school year due to the generous support from its members, their law firms and our business partners. We are grateful to all those who participated in this year’s scholarship drive:

Adams & Adams, LLP	Peterson Bernard
Akerman Senterfitt	Podhurst Orseck, P.A.
Alexander Reus P.A.	Ratzan Law Group, P.A.
Allen, Victoria	Rice Pugatch Robinson & Schiller, P.A.
Bohdan Neswiacheny (Law Offices of)	Rosen, Edna
Boies Schiller & Flexner LLP	Rumberger Kirk & Caldwell
Chimpoulis, Hunter & Lynn	Sheets, Carole
Genovese Joblove & Battista, P.A.	Stokes McMillan Antunez P.A.
Haliczer Pettis & Schwamm, P.A.	Thornton, Davis & Fein, P.A.
Hess, Tracy	Tracey, Christine
Holland & Knight LLP	U.S. Legal
Kozyak Tropin Throckmorton	Western Digitech Inc
Lawson, Paula	Wicker, Smith, O'Hara,
Lopez, Grace	McCoy & Ford, P.A.
Murray Morin & Herman	Winter & Associates, P.A.
Peters, Bernadette	

This year the Chapter was able to award scholarships to four students:

1. Lauren Ferra - Daughter of Sahili Ferra who is employed at Murray, Morin & Herman, P.A., attending University of Florida
2. Tiara Hester - Daughter of Tata Brown who is employed at Greenberg Traurig, P.A., attending Florida Gulf Coast University
3. Erika Mayan - an employee of Kozyak Tropin & Throckmorton, attending Nova Southeastern University; and
4. Omar Paz - Son of Yamile Castro who is employed at (Kozyak Tropin & Throckmorton, attending Broward College

The scholarship recipients attended the Miami June 12th Luncheon at the Hyatt Regency where they were able listen to Debbie Montero’s, Division Director of Permanent Services at Robert Half Legal, presentation on interviewing issues and techniques. The Chapter would also like to thank the Scholarship Committee members (Arlene Drexler (Akerman Senterfitt) and Carol Stokes (Stokes McMillan Antunez P.A.) for their hard work. If you are interested in joining the committee please contact Carole Sheets at 305-441-1180. We look forward to another successful drive next year.



2013 ANNUAL
CONFERENCE
APRIL 14-17, 2013

Immediate Past-President Lisa Dasher received the well-deserved Platinum President’s Award at the Annual Conference in National Harbor, Maryland. **Congratulations, Lisa!**



Member Spotlight
*Meet Diane B. Stead, Administrator
Chimpoulis, Hunter & Lynn, P.A.*

Firm Size: 30

Years in Field: 26

What do you enjoy most about your job: Working with good people

If I weren't in my current position, I would like to be: Traveling

Favorite TV Program: Good Wife

Last Book Read: The Help

Hobbies: Photography, Scuba Diving



MAY LUNCHEON

Steve Wingert, Past President ALA 2012 -2013 visited the South Florida Chapter on May 7th and 8th where he presented at luncheons in Broward and Miami-Dade. His topic was “Leadership, Relationships & the Power of Diverse Teams.”



Equipment Purchasing- New Tax Incentives for 2013

By: Dean Morrison, Summit Funding Group

Section 179, which provides for the immediate expensing of qualifying assets, was scheduled for a precipitous drop in usefulness in 2012 and beyond. The provision allowed for the immediate write-off of up to \$500,000 in assets in 2011, but only \$125,000 in 2012 and \$25,000 in 2013. The fiscal cliff deal changed all of that with big and very surprising news! Section 179 has received a nice boost for the 2013 tax year. This is due to the passage of H.R.8: American Taxpayer Relief Act of 2012 (The "fiscal cliff / fiscal crisis" bill). To read details, download the 154 page H.R. 8: American Taxpayer Relief Act of 2012 , Section 179 has been enhanced for the 2013 tax year increasing the deduction limit to \$500,000 with the limit on capital purchases being increased to \$2,000,000

and bonus depreciation set at 50%. Another important detail:

2012's old limit (\$125,000 deduction) has now been raised to \$500,000 as well. This means qualifying purchases you made in 2012 can now take advantage of the new, higher deduction limits.

As in previous years, Section 179 Deduction is available for most new and used capital equipment, and also includes software and all of the services ancillary to that specific implementation including training and consulting costs. Similarly, the amount of qualifying assets that can be placed in service before a reduction in the limitation is required has been increased from \$500,000 in 2012 and

\$200,000 in 2013 to \$2,000,000 in both years. Furthermore, the definition of “qualifying assets” will continue to include computer software in 2013, as the new legislation extended this piece of Section 179 for one year. Bonus Depreciation is useful to very large law firms spending more than \$560,000 on new capital equipment in 2013 and also firms with a net loss in 2013 qualify to carry-forward the Bonus Depreciation to a future year. When applying these provisions, Section 179 is generally taken first, followed by Bonus Depreciation.

\$150,000 in new equipment, technology or software/services for less than \$100,000? Would it change your business strategy? Could it Improve efficiency or reduce operating costs? The government is giving you a gift buried in 2000 pages of tax code. Writing off more provides a strong financial incentive to buy equipment, technology or software systems...Or buy more than originally planned because you get more for your money.

Dean Morrison is the National Business Development Manager for Summit Funding Group. To learn how financing and the Section179 deduction can help you build a stronger bottom line, contact us today at dmorrison@4sfg.com or by phone at 888-470-3902
*The material provided is for information purposes only and is not meant to provide tax or financial advice. Please consult with your tax advisor. For most recent and up to date information refer to www.irs.gov.

\$150K ASSET EXAMPLE

Equipment Purchase	\$150,000.00
Section 179 Deduction	\$150,000.00
Bonus Depreciation	\$0.00
Normal 1st Year Depreciation	\$1,100.00
Total 1st Year Deduction	\$150,000.00
Cash Savings	\$52,500.00
Net Equipment Cost	\$97,500.00



2013 LEGAL EXPO



2013 ANNUAL PICNIC



SOUTH FLORIDA CHAPTER, ALA

2013-2014 BOARD OF DIRECTORS:

PRESIDENT

[Paula J. Lawson, CLM](#); Genovese, Joblove & Battista, P.A. 305-349-2300

PRESIDENT-ELECT

[Vicki Smith-Bilt, CLM](#), Greenberg Trauig..... 305-579-0765

VICE PRESIDENT - MEMBERSHIP

[Judi Pawloski, CLM](#), Peterson Bernard..... 954-763-3200

SECRETARY

[Nadean Stone, CLM](#), Ratzan Law Group 305-374-6366

TREASURER

[Carole Sheets](#); Murray, Morin & Herman, P.A. 305-441-1180

DIRECTORS

[Lisa Dasher, CPA, CLM](#); Wicker, Smith, O'Hara, McCoy & Ford..... 305-448-3939

[Victoria Allen, CLM](#); Rogers, Morris & Ziegler, LLP 954-462-1431

COMMITTEES:

AWARDS

[Paula J. Lawson, CLM](#)
Genovese, Joblove & Battista, P.A.

BUSINESS PARTNER RELATIONS

[Bernadette Peters, CLM](#)
Horr, Novak & Skipp, P.A.

CHARITY

[Grace Lopez](#)
Weil, Gotshal & Manges LLP

NEWSLETTER

[Gary Smith](#)
Richard & Richard

PAST PRESIDENTS

[Lisa Dasher, CPA, CLM](#)
Wicker, Smith, O'Hara, McCoy & Ford

PHOTOGRAPHER/HISTORIAN

[Yvonne Iturralde](#)
Adams Adams Baca McMillen

PLACEMENT-ADMINISTRATORS

[Lisa Dasher, CPA, CLM](#)
Wicker, Smith, O'Hara, McCoy & Ford

PROGRAMS

[Marie Colón](#)
Littler Mendelson

REGIONAL COUNCIL

[Lisa Dasher, CPA, CLM](#)
Wicker, Smith, O'Hara, McCoy & Ford

SCHOLARSHIP

[Carole Sheets](#)
Murray, Morin & Herman

SOCIAL LIAISON

[Helmut Gaensel](#)
Quintairos, Prieto, Wood & Boyer, P.A.

WEBINARS

[Jackie Fleites](#)
Bilzin Sumberg Baena
Price & Axelrod, LLP

[Sarah Lyons](#)

Holland & Knight, LLP

WEBSITE

[Jackie Fleites](#)
Bilzin Sumberg Baena
Price & Axelrod, LLP

Calendar

July 17, 2013

2:00-3:00 pm

Webinar: Negotiate the Lease: Maneuver the Maze of Real Estate Options (OM)

Free to Chapter members In Miami @ Horr, Novak & Skipp, P.A. or Bilzin Sumberg In FTL @ Holland & Knight

July 17, 2013

5:30-7 pm

Broward Happy Hour sponsored by Orange Legal

August 13, 2013

12:00-1:30 pm

Broward Monthly Lunch Meeting
The Tower Club
Topic: A Supervisor's Guide To Promoting Diversity And Preventing Unlawful Harassment, Discrimination And Retaliation

August 14, 2013

Miami Monthly Meeting

12:00-2:00 pm

Hyatt - Miami
Topic: A Supervisor's Guide To Promoting Diversity And Preventing Unlawful Harassment, Discrimination And Retaliation

SAVE THE DATE!

2013 Bowling

for the Cure

September 26, 2013

5:30 - 8:30 pm

GO TO

WWW.ALASOFLA.ORG

TO REGISTER FOR ANY OF THE ABOVE EVENTS