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Present

THE CHIEF FINANCIAL OFFICER'S FORUM

May 19-20, 2005

The St. Regis, New York City

Co-Chairs:

Greg Dolan

Chief Financial Officer
White & Case LLP

J. Mark Santiago

Managing Director
International CoSourcing Group

Conference Highlights Include:

- Dynamics of Profitability – What Separates the Very Profitable from Everyone Else?
- Outsourcing Law Firm Operations
- Outsourcing, From the Back Yard to Bangalore
- Budgeting, Financial Forecasting and Reporting
- Business Intelligence for Compensation Analysis and Client Profitability
- Improving Your Numbers – Implementing Change
- Best Practices Approach to Law Firm Profitability Analysis – Howrey Simon Perspective
- Hold on to Your Wallets – Technology Round Up
- What Your Managing Partner Needs From You and What You Need From Your Managing Partner
- Life After a Merger
- Risk Management
- Pension Plans
- Where the Past and the Future Meet – What I Have Learned in the Past 25 Years and What Should You Expect in the Next?

The
Definitive
MANAGEMENT SERIES

ALM EVENTS

THE CHIEF FINANCIAL OFFICER'S FORUM

This Program is Designed for:

- Law Firm Chief Financial Officers
- Executive Directors
- Finance Managers
- Budgeting Professionals
- Financial Analysis Specialists
- Partners in Charge of Firm Administration, Accounting & Financial Planning
- Members of the Executive Team Faced with Critical Financial Decisions

Beyond the Basics – Moving Your Firm to a Higher Level

The business of law is changing every day. Yesterday's information, technology and analytics will not meet the challenges of tomorrow. This program is designed to challenge your current thinking and provide you with tools and ideas that will assist you in moving your firm to the next level.

Together the faculty and delegates will delve into and thoroughly discuss important business issues including:

- How are other firms really doing?
- Administrative support paradigms
- Budgeting and forecasting
- Profitability and returns
- Professional relations within your firm
- The future of law firm technology
- How to manage a merger
- Risk management
- New strategies for funding your firm's pension

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The Chief Financial Officer's Forum
May 19-20, 2005
The St. Regis Hotel, New York City

As part of The Definitive Management Series – eight unique programs focused on the essential concerns of specific executive levels running today's firms – "The Chief Financial Officer's Forum" is a two-day, information-packed program designed to address the financial needs of today's law firms.

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Agenda

Thursday May 19, 2005

9:00 - 9:15 AM

Welcome and Opening Remarks

9:15 - 10:00 AM

Dynamics of Profitability – What Separates the Very Profitable from Everyone Else?

- Presentation of five year profitability analysis updated to include preliminary 2004 data
- Description of the key quantitative and qualitative factors separating the most profitable firms from the pack

Presented by

Lucinda J. Tambourine
Director
The Citigroup Private Bank
Citibank F.S.B.

10:00 - 11:00 AM

Outsourcing Law Firm Operations

Outsourcing, from the back yard to Bangalore

This panel will discuss the different approaches that major law firms have taken to outsourcing administrative functions to third-party providers. Key topics to be addressed include:

- Tradeoffs between US and offshore outsourcers
- The legal and liability issues involved in sending client data to independent third parties
- What type of cost savings can be achieved and when do they materialize
- What functions are candidates for outsourcing and does location (US or offshore) affect your choices?
- Data security, integrity and redundancy

The panel will provide insight into the pros and cons of domestic and foreign outsourcing and discuss what the future may bring.

Presented by

J. Mark Santiago
Managing Director
International CoSourcing Group

Jason Brennan
Director, Legal Services
OfficeTiger LLC

Patrick Tisdale
Chief Information Officer
Orrick, Herrington & Sutcliffe LLP

11:00 - 11:15 AM

Mid-Morning Break

11:15 - 12:15 PM

Budgeting, Financial Forecasting and Reporting

Join us to learn how a proven "Best Practice" methodology, built upon a robust Business Intelligence platform, has empowered Dewey Ballantine, Howrey Simon and many other AMLAW 200 law firms with a state-of-the-art Budgeting, Financial Forecasting and Reporting solution that delivers results in real-time, improving accuracy, removing manual effort, and taking the pain away from working with static disconnected spreadsheets. The session will discuss the following:

- The Pain and Business Process prior to an implementation of a BI solution for Budgeting Forecasting and Reporting
- Best practice approach – Budgeting Methodologies
- Business and Process Benefits to the firm and finance team
- Additional business areas that the BI platform can be used to improve other business processes, i.e. Profitability Reporting and Analysis, Partner Compensation Analysis etc.

Presented by

David Libesman
Founder and Chief Technology Officer
Satori Group, Inc.

Thomas O. Mullikin
Controller
Dewey Ballantine LLP

Ilya A. Alter
Financial Analyst
Howrey Simon Arnold & White, LLP

12:15 - 1:30 PM

Luncheon

Hosted by TAX AND BUSINESS SERVICES



1:30 - 2:30 PM

Business Intelligence for Compensation Analysis and Client Profitability

Gathering business intelligence for partner compensation

- Using business intelligence software to assist in partner compensation
- Researching alternative vendors
- Defining system requirements and system capabilities

Working with the Compensation Committee

- Important performance metrics for partner compensation
- Factoring client profitability into the process
- Balancing the various measures in the process

Presented by

Todd S. Lundy
Lead Managing Director
Law Firm Strategy Group
American Express Tax & Business Services

David F. Morrison
Chief Financial Officer
Heller Ehrman White & McAuliffe LLP

2:30 - 3:30 PM

Improving Your Numbers – Implementing Change

- Balancing your lawyers and your workload
- Pushing for budgets - time and financial
- Timely billing and collection
- Controlling costs
- Better utilization of technology
- Managing non-paying clients
- Managing non-compliant partners
- Easy cost savings measures you may not have considered
- Managing your non-lawyer staff and your workload

Presented by

Michael R. Marget
Managing Director
Garden Carton Douglas LLP

Audrey H. Rubin, Esq.
Chief Operating Officer
Butler Rubin Saltarelli & Boyd LLP

Barry A. Rosenthal
Chairman, National Law Firm Consulting Group
American Express Tax & Business Services

3:30 - 3:45 PM

Afternoon Break

3:45 - 4:30PM

Best Practices Approach to Law Firm Profitability Analysis – Howrey Simon Perspective

The Howrey Approach

- Value of profitability analysis
- Why profitability reports can be divisive
- Historical practices
- Need for detailed profitability analysis

What is Profitability?

- Productivity v. Profitability
- Two verticals of analysis
- Components
- Three methods of analysis

Live Demonstration of Profitability Reports

Methodology Overview of Profitability Analysis

- Calculating compensation
- Costs used
- Calculating overhead

Implementation of a BI Solution

- Prior to a business intelligence solution
- Addressing the need
- Profitability solution roadmap
- Business benefits

Presented by:

Ilya A. Alter
Financial Analyst
Howrey Simon Arnold & White, LLP

Barbara Preston
Chief Financial Officer
Howrey Simon Arnold & White, LLP

4:30 - 5:30 PM

Hold on to Your Wallets – Technology Round Up

This segment is designed to give you the most up-to-date information on technology impacting your daily operations. Experts from leading technology firms, together with a prominent CIO, will participate in an interactive discussion led by Monica Bay.

Moderator:

Monica Bay
Editor-in-Chief: *Law Technology News*
Editorial Director: *Law Firm Inc., Small Firm Business*
ALM

Panelists:

Donald Jaycox
US CIO
DLA Piper Rudnick Gray Cary US LLP

Brad Smuland
Vice President Information Technology
Merrill Corporation

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Joe Romanowski
Vice President of Product Strategy
ZANTAZ Inc.

ZANTAZ demonstrates how organizations can reduce the high costs of processing electronic data for discovery by eliminating the middleman broker. Learn how to utilize your existing email and file management systems to fulfill legal and regulatory document requests for your legal counsel anytime and avoid risks and delays associated with third-party processing. Through case studies, we will discuss how Information Retention & Discovery Management (IRDM) processes have evolved to help manage information assets more effectively for legal requests.

Dave Weber
Vice President, Products
ADERANT

ADERANT develops front and back office business applications for professional service firms. Our solutions are built on Microsoft .NET and Web Services for seamless integration, simplified deployment, rapid adoption and easy maintenance. Designed to fit the way you work today, ADERANT's flexible architecture can adapt as your business grows and changes. ADERANT translates business data into information that accelerates both the quality and the speed of decision-making to create a more predicative and profitable business. The results are better visibility into business performance and total spend, while maintaining firm compliance and minimizing risk.

5:30 PM

Cocktail Reception

Hosted by



Agenda

Friday May 20, 2005

9:00 - 10:30 AM

Aligning the Stars: Leading the Professional Services Firm

Outstanding firms align stars across business lines, geographies and even generations. This session will focus on understanding how successful firms create and sustain alignment via

- Strategy
- Development
- Culture
- Leadership
- Careers

Presented by

Walter Kiechel III
Editor At Large
Harvard Business School Publishing

10:30 - 11:15 AM

Mid-Morning Break

11:15 - 12:15 PM

What Your Managing Partner Needs From You and What You Need From Your Managing Partner?

Increasingly, CFO and individuals responsible for financial management of law firms are relied upon to provide not just numbers but insight, analysis and interpretation of the firm's performance. This topic will explore from the Managing Partner perspective what types of data and analysis help manage a firm. Topics include:

- Proactive financial analysis
- What is profitability, really!
- How to be prepared for merger due diligence
- Partner vs. employee mindset

Presented by

Nicholas Tortorella
Executive Director
Kramer Levin Naftalis & Frankel, LLP

12:15 - 1:15 PM

Lunch Break

1:15 - 2:00 PM

Life After a Merger

- Strategic considerations in matter intake
- Implications for the lateral partner process
- Implications for practice management
- Tracking cross-border work flow

Presented by

Jeffrey F. Liss
Co-Managing Partner -U.S.
DLA Piper Rudnick Gray Cary U.S. LLP

2:00 - 3:00 PM

Risk Management and Internal Controls

- Risk management issues – operational, financial and reputational
- Impact of international operations on the law firm risk profile
- Assessing your internal control environment
- Common internal control problems
- Expanding role of the internal audit function

Presented by

Greg Dolan
Chief Financial Officer
White & Case LLP

Steve Wrede
Partner
Ernst &Young LLP

3:00 - 3:15 PM

Afternoon Break

3:15 - 4:00 PM

Partnership Retirement Benefits: Return on Equity or Retirement Program?

- Creating a program aligned with business strategy
- Generational issues and partnership fairness
- Comparing the perceived value to its true cost
- Establishing a program that transfers Firm value to its partnership

Presented by

John J. Fiore
National Leader of Human Capital M&A Services
Deloitte Consulting LLP

Joseph A. Rosalie
National Leader of Global Employer Rewards
Deloitte Consulting LLP

4:00 - 4:45 PM

Where the Past and The Future Meet – What I Have Learned in the Past 25 Years and What Should You Expect In the Next?

- How the practice of law has changed
- How the people becoming lawyers have changed
- Impact of technology and other major catalysts for change
- Speculations on the future

Presented by

John C. Feldkamp
Executive Director
Sidley Austin Brown & Wood LLP
New York, New York

4:45 PM

Conference Adjourns

Registration

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