

Syllabus:

Introduction:

- Who I am
 - Roots, the Journeys, the Good stuff
- How'd I get here
 - Law School
 - Law Review
 - Law Interviews
 - Law Rejections
 - The "Fire Drill"
 - The "Decision"
 - The Beginnings
 - Broom Closet Office –not virtual
 - Decision to get more space
 - Decision to hire an intern
 - Decision to make the intern an employee
 - Decision to make the employee an associate
 - Crying
- What can you learn from this course
 - The Ins and outs of a practice
 - Why Virtual may not be for you
- What this course for?
 - The Downtrodden
 - The Poor....maybe.
- How I teach
 - Notes optional

Bankruptcy Practice for the New Solo.

- Why now more than ever is a great time.
 - The clients are there and they are a plenty
 - The time is right.
 - There are so many opportunities
 - Networking with other lawyers on this
- Advantages
 - Little overhead initially
 - Much of it is computerized
 - Can be done "remotely"
 - Well discuss this as I'm not a huge fan, unlike many.
 - You're HELPING PEOPLE
- Software and programs involved
 - EZ Filing
 - Best Case
 - Lexis
 - Billing Software or the lack thereof
- Cost
 - What to bill the client
 - Depends on assets

- What types
 - Reaffirmation Agreements
 - What the fees are
 - Industry standard
 - How and When you should charge more
 - When you should charge less
 - How to register with the Bankruptcy Court in NY
- Marketing
 - Often used, too often misunderstood
 - No to newspapers, yellowpages.com, etc.
 - Citysearch, Yelp.com, Avvo.com, LOCAL sites
- What you'll need
 - Equipment, Admin
- Pro Bono
 - Like "The Secret", but real.
 - Two birds, one stone
 - How to network through Pro Bono
 - Trustees and Pro Bono

Before the Marketing, The Law:

- Means Test (The Simple Version)
 - Constantly updated
 - Found on DOJ site
 - Family size
 - Heads on bed
 - Roommates, grandmas and pets
 - The DEDUCTIONS
 - What to take and when
 - Your bread and butter
- Assets *Under both NY Exemption Law and Federal
 - How to value them
 - Homes
 - Zillow vs. Appraisal
 - Cars
 - Personal Injury Cases
 - IRA, 401k
 -
- Liabilities
 - Secured vs. Unsecured
 - Dischargeable vs. not
 - Child Support
 - Back Taxes
 - Student Loans
 - Medical Bills
 - Cable Bills
 - "Can you pay my bills" bills
- Schedule I/J (Income vs. Expenses)
 - How to use cat food to your advantage

- Statement of Financial Affairs
 - The clients financial life
 - How to complete this correctly
- Transfers of Property
 - A big “Uh oh” moment
 - When and where and to whom and for how much
- Exemptions
 - Federal
 - NY State
- Exemption Planning
 - When exemption planning births Fraud
 - How to properly do it
 - How you know you’re improperly doing it
 - The gut feeling
- The Do’s and Don’t’s
- The Trustee Package
 - Tabs
 - What to include
 - Each Trustees likes and dislikes
 - How to send it
 - How to follow up
 - Notices

The Initial Client Interview

- The questions to ask
 - And also HOW to ask them
 - Valuations
- The questions that aren’t asked but should be asked
- How to know when to ask further questions and about what
- The common questions the client will ask
- The answers
- The Advice to give about credit cards and credit scores
- How to be as thorough as possible
- The Deposit
- The Retainer
- The follow up guarantees
- The Credit Counseling Course

The Meeting of the Creditors

- What to send to the Trustee prior
 - Documents
 - Bills
 - Taxes
 - Bank Statements
 - Caveat
 - HUD-1
 - Loan Statements
- How to Send it
- What to Expect
 - Demeanor

- When to come
 - What to do when you get there
- Prepping the Client
 - This is where you make your money as a lawyer
- What to bring to the meeting
 - Social Security Card
 - Picture ID
 - State ID showing jurisdiction
- Dressing (yes, I'm serious)
- Presentation is everything
- The 21 Questions to Prepare for
 - And the 10 follow up questions
- What happens when it's over
 - How to counsel the client effectively.
 - What if bill collectors call

The Crucial Next Steps-Keeping the Client Happy

- Unsolicited updates.
- How long will the process take to finish
- Credit Score counseling
- Building up credit again
- Value Added services

Finding the Clients-Not Marketing

- Using Video Blogs
 - Relate Relate Relate
- Using FB/Twitter (but not in the usual way)
- Skype
 - Making it Easy
 - Saturday Skype
- Authenticity
 - The reason never to pretend
- Pro Bono work
- Why "Marketing" doesn't work
- Yelp, CitySearch, Avvo
- Blogging
- Networking (without name tags)