



The MBA Solo & Small Firm Committee presents

Intake & Closing

Thursday, March 21, 12-1:30 p.m.

Hotel Monaco, Alder Creek Room, 506 SW Washington St., Portland

The workshop discussion will be led by the following attorneys: **Lee Wachocki**, Practice Management Advisor with the Professional Liability Fund; **Marisa Moneyhun**, probate and adult protective proceedings solo practitioner in downtown Portland practicing; and **Andy Green**, personal injury and criminal defense solo practitioner in downtown Portland.

Intake topics will include:

- Different approaches to the intake process,
- Best practices for conflict checks, and
- What to include in your retainer agreement.

Closing topics will include:

- What to include in your closing letter
- Capturing everything that belongs in the 'client file,'
- What to do when your client owes money, and
- Best practices for file retention and destruction.

Lunch is provided.

The MBA will apply for one hour of CLE credit.

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Send form and payment to:
Multnomah Bar Association
620 SW 5th Ave Ste 1220
Portland OR 97204
Fax 503.243.1881 (for credit cards only) Ph 503.222.3275

Register me for the workshop as indicated:

- MBA Member \$20.00
- Non-MBA Member \$60.00

Payment Options:

- Check (enclosed) *or*
- Visa MasterCard American Express

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