



Oregon Law Institute
of Lewis & Clark Law School

Representing Family and Closely Held Businesses

Unique issues are at the heart of every small business. Representing them requires a broad understanding of many practice areas. Our experienced faculty from diverse areas of practice will help you manage the intersection of business strategies, family dynamics, taxes, and estate planning.

Friday, February 25, 2011

**Oregon Convention Center
777 NE Martin Luther King Jr. Blvd.
Portland, Oregon**

5.75 General and .5 Ethics MCLE Credits

SCHEDULE

- 8:15 a.m. LATE REGISTRATION AND DISTRIBUTION OF MATERIALS
- 8:45–9:30 **Employment Law Concerns for Small Businesses**
- Wage and hour traps
 - EEO considerations
 - Union organization
 - Employee handbook and other at-will issues
- *Richard F. Liebman*
- 9:30–10:15 **Top 10 Intellectual Property Issues Small Businesses Confront—How to Advise Your Client on IP Issues**
- Confidentiality—when and how to share ideas
 - Selecting an appropriate trademark
 - Using internet images for the business website
 - Software licensing
 - General business branding
 - Copyright and trademark registration
 - Common mistakes and misconceptions of patent law
- *Brooklyn Baggett*
– *Rich Roberson*
- 10:15–10:30 BREAK
- 10:30–11:15 **Divorce and the Role of the Business Lawyer**
- Divorce, legal separation, and dissolution of a domestic partnership
 - The role of the trusted advisor
 - Discovery, depositions, and protective orders
 - Business valuations
 - Minority discounts and marketability discounts
 - Stock redemptions, money awards, and tax issues
 - Document drafting: stock pledge agreements and security instruments
 - Estate planning and premarital agreements
- *Laurel P. Hook*
- 11:15–12:00 **Dealing with Distressed Customers and Suppliers: Bankruptcy Primer for the Non-Bankruptcy Lawyer**
- Negotiating tactics, liens and security, risks of dealing with a potential bankrupt
 - Continuing business with a debtor: cash collateral, relief from stay, priority of claims
 - Giving back what you've gained: preference and avoidance actions
 - Getting paid: proofs of claim
- *Ann K. Chapman*
- 12:00–1:15 LUNCH (on your own)

SCHEDULE (cont.)

1:15–2:15	Tax Planning for Closely Held Businesses <ul style="list-style-type: none">■ Tax strategies in entity formation■ Planning for business expansion■ Employee incentives■ Planning for the sale of the business<ul style="list-style-type: none">– <i>Mark F. LeRoux</i>– <i>Michael J. Millender</i>
2:15–2:30	BREAK
2:30–3:30	Estate Planning for Owners of Closely Held Businesses <ul style="list-style-type: none">■ Succession planning and transfers■ Estate and gift tax issues■ Valuation<ul style="list-style-type: none">– <i>Emily V. Karr</i>
3:30–4:15	Internal Investigations: Ethical and Practical Challenges <ul style="list-style-type: none">■ Understanding the context and who controls the information■ Identifying your client: the corporation and/or individuals■ Responding to subpoenas, voluntary disclosures, and whistle-blower claims■ Recognizing when separate counsel is needed and joint defense agreements■ Knowing when to obtain conflict waivers■ Detecting and handling incriminating information<ul style="list-style-type: none">– <i>Janet Lee Hoffman</i>
4:15 p.m.	ADJOURN

Program Faculty

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LIVE PRESENTATION

Portland – 2/25/11

Oregon Convention Center
777 NE MLK Jr. Blvd.

MCLE CREDIT

*Representing Family and Closely
Held Businesses* will receive

5.75 General and **.5** Ethics
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VIDEO REPLAYS

Please register at least one week prior to the replay date.

Bend – 3/11/11

Replay 8:30 a.m.

Bryant Lovlien & Jarvis
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Harrang Long Gary & Rudnick PC
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Medford – 3/4/11

Replay 8:30 a.m.

Kellington Krack Richmond
Blackhurst & Glatte LLP
23 Newtown Street

Portland – 3/16/11

Replay 9:00 a.m.

Oregon Law Institute
Gus J. Solomon Courthouse
620 SW Main Street, Ste. 706

Representing Family and Closely Held Businesses

Friday, February 25, 2011

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TUITION

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- ☐ **\$179** Early registration (*received by February 21, 2011*)
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CONFIRMATION: Confirmation will be sent via e-mail.

CANCELLATION POLICY: Tuition minus a \$20 handling charge will be refunded if the cancellation request is *written and received* by Monday, February 21, 2011.

NEED ASSISTANCE: If you are a person with a disability, please let OLI know in time to make any necessary accommodations for you.

TUITION ASSISTANCE: A limited number of scholarships are available based on financial need. Contact OLI.