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SUMMARY KEYWORDS

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00:01
Morning, everyone.

00:05
Thank you for spending your Saturday morning in the law library. You know, I hope it's educational. This is a second part series to solo and small law firm practice management series. We're going to cover finance and technology. Just show of hands how many people were at series one. Okay, so that's almost all of you. Okay. Yeah, cuz we have a little bit of overlap, because some of the topics do touch on each other. But, you know, it'll be different. And I'm David Seto, I'm filling in for Eric dancy, who is supposed to be here. I do wills and trusts and Car Accident, Personal Injury at King Seto and john, in Sorrento Valley. And you know, and we have Philip Shapiro, who can introduce itself. Well, I

01:14
probably knew a lot of you when you were last. But Phil Shapiro. I do mostly criminal defense work. And as David said, if you were to get arrested on the way home, take one of my cards. But there is some overlap. This is not as much fun as the first week, but we'll try to make it fun. But it's, it's really important because of the the product names and so forth. If any of you are have experienced with with one of these technologies, if you could let us know your experience quickly so that if it's good or bad, we'd like to know, and we're going to take a break so that you can feed the meters at 1030. But, you know, if you have to get up for any other reason, go ahead.

02:09

Okay. Okay, it's so law firm technology. Types of hardware, computers, printer and scanner. Software, you know, just a general overview right now. Office stuff. Document generating. Telephone, fax, yeah. Lawyers use too many faxes, research tools, etc. What are some of the tech things we'll cover today? So first hardware. And then I threw in some shoot wise in that. Switching over.

03:02
Okay, there we go.

03:07
All right, let's see.

03:09
I threw in some ABA rules. But I guess it wasn't enough to get legal ethics credit. Out of the out, throw in some more next time. So California switching to the ABA model rules. And as part of legal ethics, you are required to keep up to date with technology. And, you know, the common way that comes up is 1.6, which you have to keep the client information confidential. So different kinds of hardware. You know, you can have a desktop computer or a laptop computer.

04:00
Let me ask you a question. I'll be interrupting, first of all, because I can't hear. And secondly, to make this as much real world as David and I can do. How many of you, at the end of your emails have a statement about confidentiality of some sort or another? Everybody has a different one? Do you think that that is going to protect you? State Bar is if you call up the state bar or if you look up the cases you'll find it. We can't count on it. It's better to have it than not to have it but take a look at it every once while you'll find out the cases are probably followed by some other case by now. But take a look at the least updated

04:55
Sure. All right. Who you ever used a typewriter before? Okay. That's a lot. Who here has used the typewriter at a law firm before? Okay. So for the people who haven't used a typewriter, the flaw of the typewriter is, you know, people make typos. And when you use it, typewriter, you can't fix it. Although they do have the little correction tape thing that doesn't work very well. So, you know, now Plus, you also put the carbon paper in the back. Oh, yeah, I've used the carbon paper too. So now everyone uses computers. And when it comes to computers, you know, desktop versus

laptop, some of that is related to the type of law practice that you're going to do. So, which was in the first presentation? So? Are you gonna have like a regular, nice corner office somewhere? Or are you going to do a virtual office, you know, at the 11th floor, on the law, at the County Bar center, you know, or just like a mailbox somewhere and then meet clients at Starbucks. If, if you're gonna do all these mobile stuff, you know, desktop, probably won't work for you.

06:30
laptop.

06:32
You know, like, and there's different kinds of hardware that people like, Microsoft Surface Pro, some lawyers swear by it, Mac books, iPads, you know, if anyone has a question, you can go ahead and interrupt. You know, like, whichever one you use, please put a password on it. You know, you don't want to accidentally lose this somewhere. And then have all your client information like exposed. If you do like, you know, a lot of different areas of law, you'll have like social security numbers and stuff in your files. And you don't want that stuff to get out of there.

07:12
You really should. And there are some cases with the State Bar. I, because I can't say no to anybody. I was on this ethics committee, the state bar for what five years. Now I'm going to solo and small firm. So I'll give you some real stuff.

07:36
The

07:40
if you have a computer that you're you're sharing, if you're doing scanning, or faxing a lot of faxing. In my office, the building is all on one wireless system. When I scan something every once in a while another lawyer will bring it bring it into me because it came in it came to their printer because of some configuration problems. So make sure if you're scanning in your faxing, that they're secure and they're going to the right place I mean I know it sounds foolish but I'm not alone. There's a lot of people that have to be very careful with their scanning and faxing. How many of you use your printer copier? It affects how many how many of you have an online electronically fixed I still like I still like the mechanical way but we're not heading that way. We're heading towards doing it by electronics.

08:47
And so yeah. Okay. I don't know why that one's paperless office. I hear paperless office thrown around. I haven't actually seen one yet.

09:10
You know, especially I look at all these big law friends with a big copier scanner printer and they have way bigger files than I do. Like the the better that scanning and printing equipment. Seems like the more pages you're going to use to print out which is what happened to our law firm. But you know, you can certainly use a hybrid. there there's multifunction, you know, printer scanner, copier, fax, you know, it's only like 100 bucks. Everyone scares but the swears by scansnap which is like $300 it can scan both sides of the paper at the same time, which is especially helpful when opposing counsel is trying to save on postage. And, you know, doesn't want to pay the extra 50 cents and, you know prints on both sides to annoy you. You can get an industrial copier, they're like, a couple $1,000 USD or, you know, 50,000 new are 15 It's a small crappy one. The newer equipment will also OCR the pages as they come in, which means that when you scan it into a PDF, it'll be readable by your computer right away, which is very handy. Because you know, I, when I graduated, we still did our document production through paper. And I still remember going through a stack of paper this thick trying to find some magical keyword on some contract or whatever. But with OCR stuff, you can send it through the computer, and then you can run a search for the magic keyword that you're looking for. And you don't have to read through all of those. Unless you're purposefully trying to build ours, which you know that you got to do that you got to do that.

11:17
I might be saying something that I'm the only person on earth that has this problem. But when you're scanning, you know, and you have your scanner, set up such that or you haven't changed it so that it just has a serial number for the scan or some sort of a numbering system. Do yourself a big favor, and, and default or, you know, work, work your scanner, so that you can put in a descriptive title always sounds Elementary, always put the date as part of your title.

11:57
And,

11:59
and the reason I'm saying that I'll give you a real life experience that I got a call about a month

ago from a guy so there's this Phil Shapiro the lawyer and I, you know, right away, I said, I've got what am I buying? So I said, Yeah. And he said, My mother died. Now I said, I'm sorry to hear that, you know, can I ask what how I'm involved, the way you did her will, at that will was done 21 years ago. And had I not at that time, especially been very careful about putting dates on all of my Well, those days that it was probably copy paper, but it had an I put the dates, I was able to retrieve 21 year old stuff just by putting in by date. So we get lazy and I know it often we get lazy and we just scan something and it's got some kind of a random number on it. And we don't give it a name and a date. My Secretary knows by now that I'm going to yell at her when she does a letter. I said it might be Macmillan police report, but I always put the date down. It's much easier to retrieve and if you have to write. as often happens. counsel says the opposing counsel says I never got that letter or worship declined said I never I never got that letter. Here I'm going to lose you but I still use WordPerfect I still think WordPerfect is good good for good for us. Oh Word Perfect. I know all these people that were born after 1890 in system but anyway, I it's upright that will never end until the two of us will go on. But with make sure that to you. Like I say put the date in and

14:04
on my emails.

14:06
Only because I've been in trouble for not doing it not because I look forward. But I always label each email and archive it into into its own box. Otherwise, you're going to have 2000 or 3000 emails in there and no way of retrieving one single one. And you will have to believe me you will have to Sunday.

14:32
No, that's a good idea. Like even if you're like emailing some third party about a case to put your clients name somewhere in the email or in the subject line so you can find it

14:46
and put it this is another this is because of my quirks I suppose but I have a 10 second delay on my email setup. Because I'll say something that I should upset, it'll give me 10 seconds to delete that email or change it that 10 seconds is probably saved me from being sued. Because I have, you know, I get mad at somebody and you say some, so put a delay on your email, most emails can do it.

15:21

Software. Okay. So the software type you need will depend on your law practice type. If you do litigation, versus, you know, transactional stuff is like generic productivity software, you know, Microsoft Office, you know, just like $100 a year, if you're still a student, or just a regular home non business user, Microsoft will give you a discounted rate of $150. I don't know if any of you are still, you know, students or anything. Open Office is always free. But not as good as word like, there's a few documents that for some reason, it wouldn't open correctly. And when I use the old version, Open Office, it would crash and then wipe out my file. So I don't like to use it. It's not worth the hassle. Acrobat Pro. If you deal with PDFs a lot, then you you have to get it and it's, you know, 300 500 bucks, you know, for a desktop. It's worth it. You just have to, you just have to pay it. They also sell like monthly subscriptions now on it's like 20 a month or something like that. But it has all sorts of features that you'll need. GIMP versus Photoshop. One thing that annoys me to no end is I asked the client to send me a copy of a document. And then they take out their phone. And then they go click, and then they then they email it to me. And a lot of times their technique is terrible. The worst one of all is like the guy who was sitting in his car after a car accident and called me. And then he sent me like, I guess his insurance information. And it was dark in his car because the accident happened at night. And then he put it on his lap. And then all I saw was like, blurry lap and like some white there was some kind of paper. I'm like, do that at home? More like that was his injuries? Yeah, well, maybe that will he maybe he got a concussion and something so he wasn't thinking straight, I don't know. But anyway, so if you don't like when you get these documents, there are apps that can help them take the picture is better, like camscanner. But you can also do some basic Photoshop to like, make it much better. And GIMP is the free version of Photoshop, which you know, we're not graphic artists. So for our needs, that'll work just fine. GIMP also has a batch feature. So if the client sends you 50 pages of blurry stuff, you can have it automatically Photoshop 50 of them at the same time.

18:32

How many of you do criminal work? Glad to see somebody is left caring about the misunderstood. You're gonna get if you do criminal work, or any sort of work where there's words, written and discovery. Make sure even though the law Well, I'll say this backtrack, even though the laws changed, I still always send out a Brady letter letter demanding all discovery, I still believe that you've got to protect yourself. that's beside the point. So you know, you can call me or something, I'll send you the Brady letter, but it covers all the discovery. But what David said it sounds it sounds almost obvious. But if you're going to be changing some evidence through Photoshop or something, you have to be careful that the other side doesn't say that you're manufacturing evidence. So you know, be sure they know what the original picture looks like. And also if you get as you get discovery, as you know, especially my prep, we get a lot of discovery from the DEA from the district attorney's office. It happens to be on their own proprietary stuff, so they charge you $10 per CD and then You can't play it on your I would say 50% of the time, we cannot play

their discovery. If that happens to you, you know, don't be afraid of, of telling them that you're going to, you know, they're avoiding giving you discovery when they give you a discovery that that can't be opened up. Okay.

20:26

And then just to go back real quick on like the disk thing. Since you mentioned disk, a lot of laptops don't have discs now. But for legal purposes, we still get a document production as like a CD. So you got to get an external DVD reader, right, or something like that, you know, to read that stuff. Or if you do PII, you'll get like, an X ray or something in a desk, and it's like, what the heck do I do with this,

20:58

we're starting to get more and more thumb drives, that costs $15 from the DA, but anyway, and they use a serial number, you have to put in a password, you have to put in what, it also doesn't work. But anyway, so make sure if you're going to get discovery, and that kind of format, you know whether or not it's case sensitive, you're going to go nuts. But if if when you get discovery, like this electronic discovery, and you can open it up and use it the first time. Just, it's time to pray, and thank God because it doesn't happen that often.

21:35

Software more specialized stuff like hotdocs document assembly. It can be used in the litigation context, like there's like a database with your clients info. And then you open up the hot docs and, you know, whatever type of thing you're doing on a case, and it'll spit out like a standardized letter. hotdocs is also used for wills and trusts software. So you type in your clients name and their kids. And then you'd select Options about, you know, what do they want to do with their assets, and then you push a button, and then a nice 100 page will and trust comes out, and you're not doing the old fashioned thing that some lawyers still do, which is you have a template, and then you forgot to change the old clients name, the will and trust and then the client thinks you're unprofessional. You know, it's something like that. So please don't don't use a template,

22:35

Word template, don't get caught in that don't get caught up in that thing where you're when you make a will, or in my case, some motion. And you charge the client and the client says, All you did was cut and paste. And I said, Yeah, but I decided what the cut and paste. don't back off. And while you didn't take it five hours to do it took it. Well, that's, you know, that's what you're paying for is us to decide which paragraph should go in there. So don't back off with that cut and paste.

We do it. I mean, I don't know that I ever seen an original motion in the last. Yeah, how you doing? And make sure like, take the name, take the old names.

23:22
And if it's some other law firm that did it, make sure to take their name off. There's also specialized productivity software, like hotdogs has stuff for wills and trusts, like other companies license their software to use it to make wills and trusts. If you do something like bankruptcy, you'll deal with bankruptcy pro or best case is biggest company. You know, like it's considered, you know, malpractice to do a bankruptcy work without using like a special software because there's so much data that you have to feed in there and keep track of let's see, for litigation, there's like form software, trying to remember the name of it. Do you remember what it is? I mean, obviously I don't use

24:14
it 90% of the time go to the court website for a lot of foreigners but the San Diego County Law Library has some great stuff log on to their website, they have some really good really good forms and and form letters and stuff and of course Judicial Council for pre printed forms I you know, I was kind of told by some of these lawyers from these big firms that when they get Judicial Council responses or interrogatory is something they they kind of figured Okay, so the other guy has no money to use in Judicial Council form. You know, I first of all, I don't buy It because they're charging by the hour, they're not going to do something on a judicial council form. They're gonna say they're doing an original set of form docs, you know, stuff that's really unique, like do speak English with ease. Yeah, and some of these important questions, but use Judicial Council forms. Obviously, you all know that one of the big reasons is it's been, the court has considered that every question and every item on that is not subject to objection. Unless it's some, some weird thing. So use these Judicial Council forms when you can.

25:40
Yeah, definitely use the Judicial Council form. Like if, if you're doing a lawsuit, you know, the Judicial Council has sampled templates for, you know, lawsuit complaints. And that is, I mean, it doesn't look as professional but it will, you know, kind of nudge you on all the elements of, you know, breach of contract or, you know, an injury or whatever, it's so that you don't forget, and then get demurred, which is even more embarrassing.

26:13
I suppose most of you have something to fill in the forms that are on, you know, you can get off

the line. In criminal law and and Family Law, they get different colors, for different motions for different. That's why I stopped practicing Family Law, they, they sent back some motion said it was the wrong shade of green. I decided that wasn't worth it. But we have different colors. And what I do and what is I've got golden rod and I've got yellow, and I've got these colors that I print up the Judicial Council form or settlement form. That's 90% of the time handwritten, people fill in the space of the judges get in the other side gets one that's typed in. I've heard more than once many times. Where'd you where'd you get this from? I mean, it's, it's actually printed up with the with the responses or it takes a little bit more time. But if you can possibly get the color paper that the court wants, and print it out, using your your computer, it makes it it makes it different to anything.

27:30

paperless office, like OCR software, and you got to OCR is a new thing, you got to do it somehow. hydrocracking if you're a litigator, you have to keep track of time, which is the most annoying part of being a lawyer. Well, crappy clients too. But there's a lot of software for time tracking. I think time matters is one of the more common ones unless they change their name by now. They're always emerging and changing names, Excel, time 59 there's all in one packages that keep track of everything, which I'll go into at the end. So that the time tracking stuff like as a timer, and then you enter in your case name and your matter. And then you don't have to worry about it the end of the month,

28:26

we look at it, it is a pain to put in seven minutes or 23 minutes or point six or point eight or whatever. And I I'm guilty of not doing it all the time, especially in criminal law where it's an emergency, they're there jail, and you got to run over there. I've been brought to the State Bar four times in my 32 years. So far, I've gotten no problem at all these four times, but three of them had to do with time where the was where the client said he didn't spend that much time with me, you know, and in those days, you had to go up to LA to the bar court. They weren't on your side. But each time I was able to thank god reprint out my you know the itemized time in and you know, itemized an itemized invoice does not say phone call 23 minutes. That's not it. And as you know clients do not understand because they watch television. They do not understand that a lawyer does not walk into a courtroom get called up, you know make their pitch and leave and they can understand why you put down two or three hours of court time. I always tell the client Come with me next time. I'll show you what waiting is all about. Okay,

30:09

we're gonna get into it further. But when you look at several timekeeping programs, right, and I, I

don't want to push you to give up, like, but anyone in particular that you think especially for somebody maybe starting out or some program that will get them really up and running and keeping tracks, that is like the hardest part that I'm keeping track of everything. Crazy.

30:32

Yeah, it, it is really hard. Like when you start out, Excel can be okay, you know, Excel, you already have the fi it anyway, as part of Microsoft, you know, office. And Excel, you can you can keep track of day by day, and then it has, you know, math stuff, so you can add up all the things. And then I would, like I said, I'll get into more on and but I would use like an all in one, after you have a couple of cases. Because even if you only have like two cases at a time, then Excel is, you know, enough, or if you like five cases at something, but once you get to like 10, then it's like, okay, I can't, you know, I can't do this anymore.

31:20

I think what you're bringing up is a point that we should have maybe stated earlier, when you look through here, don't just stop your brain and say there's no way I can afford, you know, unless you were born rich or you're married, rich, you're not going to be able to afford all of these things. But what was said then the last seminar that overhead is overhead is evil. And these things don't seem to go down in price. And so you have to be careful not to overextend yourself, but get paranoid. You know, the client is watching you at all times. You know that in a state bar is certainly watching you at all. Because you have a question.

32:08

Yeah, I just made a comment response to your question. I ended up getting Clio check that was like 60 bucks a month. And it's incredible. manages your time, it sends out your bill it holds your documents and keeps all your clients names and contact info, your telephone calls in there, you can upload all your documents on unlimited space, you don't need another separate Dropbox for cloud fills out that way as well.

32:40

And also with Clio, and some of you know, Trump's obvious but make sure you have on your phone too, because you're not always going to when you're out at somebody's house interviewing or whatever. Time on your phone.

32:56
You have to do your taxes at the end of the year. It will save all that as well.

33:02
If you want a payment system lawpay connects to

33:05
Clio. And if you are a bit extra, like 20 bucks a month. I tell people that there's an ATM they can you.

33:25
Let's see model rule one. Actually, I should probably read state this for the recording. So she over there asked me What was your name again? Pamela? Okay. Pamela asked, Is there a time tracking software you recommend since time tracking equals Money, Money equals being a lawyer versus, you know, outside or something? And I'd said I'll get to that later. But you know, try them all the cheap one is Excel. And then Valerie, right. Okay. Then Valerie said, Oh, I love Cleo, which is one of those all in one. Things like I think it's like 50 to 100 a month for that. But if it helps you collect, you know, your bills and stuff, then it's worth it. And I like I said I'll get into all the other ones later. So model rule 1.1, which I accepted, because it's pretty long. A lawyer doesn't necessarily need special training or prior experience to handle a legal problem which they are not familiar with. A new lawyer can be just as competent as an experienced lawyer. I'm just as good as you feel.

34:40
I'm BCE before the computer era, and law school, we won't even know what any computers we actually wrote blue books and had had to look at the professor. He couldn't look at Your, you know your phone all day. Those sound like hard times, of course, for the first few years, early years of computers that the court did not accept any kinds of judicial council forms or anything. On one side, they had to be two sided, heel to toe. And you try to figure that out in the early days when you had your Atari or you how to print that way. And they finally decided maybe they should come up to these days.

35:37
A lawyer can provide adequate representation in a wholly new field through necessary study for a

lawyer may accept representation where the requisite level of competence can be achieved by reasonable preparation. And of course, they don't define any of those. So like, and I guess, as an aside, like, a doctor friend told me like, oh, why don't you get into this field? Is there any like, you know, residency, or anything you guys have to do? I'm like, No, to be a lawyer. There's no residency for anything. Like, you can basically do whatever you want. It's like, oh, thank you should do this. And that and that. And they're like, no, it's, it's a lot of work to, you know, to get ready for all that stuff.

36:24

I suppose you suppose you didn't know an answer to a question? I know that I'm the only one here that can. But suppose you didn't know the answer to a particular question. You haven't dealt much in that field. And you call up somebody that graduated law school with your something in you, you get a real quick answer. Do you put in your billing, your detailing that you conferred with, you know, with Pamela Brown, about the subject or don't you? You better do it. And, you know, because of the new rules that talk about you can have it's malpractice. If you by the way, if you refer a client or a prospective client to another lawyer, and that lawyer malpractices somehow that can be referred back to you because you so be kept by the State Bar now says we were at a meeting two weeks ago, and one of the questions was about about mentioning if you talk to somebody else, and they say you got to put down the person's name. The client has to know that you've asked another person to question 99% of don't care.

37:40

Again, so part of the preparation, which everyone learns in law school, you got to do the research databases, Lexis Westlaw. newer ones like fast case. There's Google Scholar. And right now there's like, and there's a deal on Lexus for like, small law firms that I think it's like 100 or 200 a month. For a small firm. It's something like that law more reasonable than it used to be. was last still expensive, but it has everything in there to get the good on? Yeah, Westlaw is the best. Yeah,

38:18

let me give you a hint of how to save some money on these on these products. Also, I also pitch you should join, consider joining one of the sections in the California Lawyers Association. Thank God, not the California bar anymore. Now the California Lawyers Association. I chaired the solo small, firm, and you know, people don't have an understanding here. And I'm sure most of you fall into this group of being solo practitioners. Now, there's a difference within the state bar, but five lawyers or less, someone say seven words or less, but it's considered to be a small firm 86% of the lawyers in California are in a solo or small firm, not these big firms. Don't control don't rule anymore. So if you join a section, solo and small firm, I'll give a pitch for that. Or no. I'm saying it

now. Because of all these hundreds of dollars a David so much. It's $95. It's a one time charge per year, you'll get a newsletter that will help you stay up to date in technology. And, and also when you call up one of these places to order something, you can tell them you belong to a section to tell them which section you belong to. Many of them will give you 10 or 15% discount still made and we're making deals with most vendors to give a discount. So don't be afraid to ask for a discount.

40:02

If it's an I didn't put in there, but if it's your first five years as a lawyer, cb continuing education, and the bar will give you a year of access to their database, and they have all sorts of secondary sources, you know, that can help you to do last stuff. The law library also has these databases for free, that you can access. Yes, thank you, Lisa. I remembered. And then if you know another way to get not free, but cheaply is you can hire an intern from a law school to help do your research for you. Since you know free interns are not not really that kosher. But you know, that the interns need experience. So you can give them like research to do. And Google Scholar is, it's, it is good for doing research. But don't use it to cite check or shepardize something since that's not what it's meant for.

41:13

We had three weeks ago, there was a bench bar meeting at the county bar, we're sitting at a table with three judges. And one of us asked a question, you know, how is this computer generated age changing? motions, or dch. And, and all three of them said that people are going to Google and going to and just take in the first paragraph of something or taking the last paragraph of something and putting that in as a as part of their motion. It's so obvious. And so like I say, I was, I grew up in the before they had all that stuff, Abacus to me was a thing that you counted on. But make sure that you're that, that you know how to use a logbook. We haven't forgotten how to use a logbook. If you want to see something that say I go to law library, all the books are still on the shelf with gusto. So learn how to you know, go back to your logbook, and make sure you've updated your citations and also tell you this and make sure you understand the correct way to cite. They still use the blue book. My day we had the blue book from Harvard, but learn how to say these judges were saying that that some of the ways that are being cited out of the computers are not correct. They're just local citation rules wherever the information comes from, that just want to make sure if they'll have you used to Google Scholar before, no, I that to me, there's the two worst words. Okay, Google. I have too many grandkids.

43:01

But, you know, just in case you guys don't know, Google Scholar is a part of Google where all the

reported cases for you know, federal and many states are dumped in there. So it's not just like the regular Google that you can search. But there's the the unpublished cases, there's not as many of those in there. And, you know, so that, that makes it not as good and it doesn't have site check. But it does have the reported cases, and it does report by you know, the different reporting citations in there. So you can use it. And then, you know, like, find the excerpt for the part that you want to use and inside it correctly.

43:47

We had a we had a question during the break, I think was a very good question. And because I want to look smart, I hope to get the answer from you guys. Suppose you're doing an estate wills or trusts, you're doing an estate. And and the relatives aren't very close with the with the deceased. And you've got to get their paperwork, how do you get those passwords? How do you get into their emails or their communications that have that show? deposits and withdrawals and so forth? And I don't know the answer to that is a program that does it. I'm quite sure you can't just, you know, on television, they have these under undercover people that do that stuff. But I don't know if there's a program that can tell you what the passwords are.

44:49

So I don't know if there's a program for that either. Hackers, right, you can hire a hacker, the good you know, go to Google Are you and type, you know, hacker, it's something I'm sure YouTube hasn't ran. Yet some of that is, that's why, you know, if you do estate planning, you tell people like you should do an estate plan, and you should put it somewhere where it can be found. And it's good to list the assets. Because, you know, unlike, you know, in Phil's day, or, you know, or I guess, early of my day, you don't get your bank statements every month, or your retirement statements every quarter in the mail. So or, you know, even life insurance, you know, papers, so someone passes away, and everything's a delivery, nobody will find out, you know, it's like the tree falling in the forest with nobody around. But even even your own practices of dollars,

45:52

your own practice. Does somebody know your passwords? I mean, what, why, and I, my paralegal who knows more than me about my office, my paralegal has a, when we change, we have a sheet called passwords. She has it, she keeps it. So I figured both of us aren't gonna croak at the same time, I guess. There's a science called the last pass. And every time you enter a new password, it just picks it up automatically. Don't you have to have a password to get into it? password and get some passwords? You know, vaults like that there's several programs

46:35
that like, so when our office does an estate plan, like the power of attorney says that we have, you know, the, the, the property agent is also the agent for all the digital assets. And then the the wills that our office does says like, the executor is also in charge of all the digital assets. So if need be, can go to court and get a court order and hopefully, you know, Google or, you know, Chase or whatever will let you know, find out

47:08
what's big, it's a great question. And I think maybe we ought to put that down as part of our interview with clients that, you know, if especially in estate planning that they should, or in my case, in criminal law, where they're going to be in jail for several years. You know, that, you know, is there someone else that knows your passwords?

47:31
And so, I so to answer the question, I don't know how to hack in there. I don't know if that. And I just know how to get in there legally afterwards. They're prepared beforehand. So anyway, the second part of the presentations on payments, you know, so for payments, we have to remember model rule 1.15. Funds shall be kept in a separate account maintained in the state where the lawyers office is located, or elsewhere with the consent of the client or third person and also when there's like safeguarding client property. So paint like payments. Traditionally, we lawyers love checks. I still love checks, a good settlement check is always welcome. But clients today don't have a bunch of money sitting in their checking account anymore. I saw a statistic where, you know, the average person cannot find like half of people can't find $400 in their checking account to cover it some emergency like, you know, like their tires blew up or something. So if they can't cover $400, how are they going to cover a $2,000 retainer. And that's where lawyers need to get in with the 21st century and learn how to take credit cards. There's different ways of taking a credit card. You know, there's a POS system, which is like a big, complicated, expensive thing that retailers use. There's like a square up or square that used to plug into the the audio port of your iPhone until they took out the audio port of the iPhone. You know, just to it was a good two years while we had that audio port that did square replaced it with a new type of square. You can do it through lightning or I guess you could do it through Bluetooth or Wi Fi and I haven't looked into urban then mo Yeah,

49:46
there's a lot of different apps. Yeah. Do you think is more secure phone, the iPhone? Or what's the other one? Android which do you think and there's no question about it. If you go to any expert

Android is much more secure than the iPhone much more secure. They've been trying to the people with the iPhone has been trying to make it but any any expert any book you read will tell you that compare the two and the androids are harder to break into now. They're yet but careful what you put on your phone and be careful what your clients write to you, obviously for security work, but you wait until one of your clients if you're in criminal gets arrested in the DEA subpoenas their phone records, you can't believe what people leave on their phones, I use a program called C cleaner, which the police use. And it's not that expensive. But get yourself a probe every night, I delete, make sure I delete stuff. And of course, as you know, those of you that are into the ones and zeros. When you delete a program, it doesn't kick it off the hard drive, it just changes its name slightly so so the computer doesn't see it. But get a program that swipes your pages you've looked at in your computer. You can't believe how many I have clients that have Pornhub I never got on there. All those, all those stuff that came from a search warrant. But do it for yourself, be sure to swipe your phone get a good program to delete in your computer. Sorry,

51:45

square up PayPal stripe. Now, the thing with using these these types of, you know, Credit Card Services is there is a merchant fee. There, it's like depends on the credit card, it's like two or 3%. So when you you know when someone pays you $100 through PayPal, you know you only get $98 in your bank account. And then if someone's paying an advance retainer, then that basically means you're commingling your clients funds.

52:21

Can you charge the Can you charge the client for your fees and credit card?

52:27

And different states say different things about them good, quite intelligent, I would be safe and just say no. So like the Yeah, go ahead. Credit Card. You could but I don't recommend that. The question is, can you rig it so that the one of these payment systems goes to your iolta account? And I believe the answer is yes. Although I wouldn't do it because they take 2% off the top and that that's kind of like commingling your clients money. Love pay, that's what I'm getting into. That's the next line below that, you know, so. So that so you when you're starting out and you're just doing you know, flat fee stuff, or you're you've done the work and then you send out an invoice, you know, go ahead and take PayPal for that. That's, you know, there's no ethical dilemma with that. But if you're, you're doing advanced retainers where the work is unearned, you should get like a special, you know, State Bar compliant payment system.

53:36

Let me tell you a quick thing about trust accounts. I'd like to bring the real world in when I say I've been I've had four occasions in front of the state bar, and one of them was involved with a trust account, I get a $25,000 settlement check a pose. This is a law school such as I go $25,000 settlement check from State Farm. I go to the Chase Bank or Wells Fargo in this case, and I give it to them. And for some reason I asked the teller how long till I can use that money. She said three days. I don't even know why I asked. God put that into my armamentarium. So she said three days and she gave me a receipt that said not the deposit will be good in three days. On the fourth day like a good attorney, because the rules say that you have to release the money as soon as it's available. On the fourth day I said to check to the doctors the medical bills. This is a pie case I sent the checks to the clients and then I last check I wrote to me make sure that I wrote mine the last second day because I wanted to show a different date while I wrote mine. Three weeks later, I got a registered letter from the state board that I had bounced a check in my trust account. I went over The bank and I said, How's this possible? And they said, Well, you should have waited five days. I said, and I don't know why. But I kept that receipt, it said three days. And I showed it to the Vice President of that Wells Fargo downtown. And he said, this is a mistake. And I said, well, so when I got good at what I put in front of the stapler, I showed that and it saved my life. Because showed that there was the banks for the head, the bank guy write a letter that my understanding was three days. The chief judge of the State Bar court up in LA said to me, she's really a nice lady, she said, but you know, feel good business judgment should have told you that it's five days. So if I wrote in five days, it was three days, wouldn't I be violate? Yes, I would be late because I didn't do it. So I don't have to tell you that you're going to get one way or another. But I said trust account, these banks are mandated to report a violation. Guaranteed.

56:02

And I guess, very quickly on the trust accounts, like have like some system for managing your trust account. Like have your own deposit slips, if you're depositing in the trust account with like different colors and different color checks. You know, some people have a different bank than the operating account. But then I feel like that adds a bunch of delay. So just have some system and stick with it. So you don't mix up the checks of trust account printed on it. Because if if you go to the bank teller and tell them to deposit your check, and even if you tell them put it in my iolta account, they're like, which one is that you have two checking accounts right here, they look the same to me. So you know, absolutely get your own deposit slips made.

56:51

So they don't put any of you do any minors cases where you have minors compromised to do PII. And it's a minor, and you settle a case, by law, you have to open up a bank account to put the settlement in there till they're 18. And you have to handle that very carefully. And you only I don't

know, used to be limited to 15%, you can get a third of the settlement. For some reason with kids, they limited the lawyers amount of money. And they also made it harder for you to resolve the case. So if you do minors cases, and you've set up an account, read up on that, how to do that. I think it's 25. Was it 25. That's why I got out of it couldn't be raised.

57:39
So like, for payment systems, there's different kinds of payment systems, they're supposed to be trust account compliant. So you know, like, I'd suggest you try them all. and see which one you like, do some research.

57:55
Up until last year, up until last year, the State Bar still had a rule on the books that you had to show a hard copy of your trust account. I guess they didn't know about computers, but you'd had to you had to have a ledger sheet. And somebody found it last year, and they finally changed it and said that it can be computer driven.

58:18
Thank you. There's law pay, there's law charge. There's stuff embedded into the all in ones like Clio and my case have a built in. I'm not sure if like lob case pier or the like all these systems have been built in

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time slip, you know.

58:46
And then

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in the state bar compliant ones, like what they do is when the client swipes a card for $1,000 $1,000 will show up in your trust account. And then the 3% that $30 fee will be deducted from your operating account. So when it comes time to, you know, reconcile your trust account, all the dollars are right there. The money's not commingled, you know, like it's easy to do your accounting at the end of the month.

59:23
And then, what do you do when the client when the client asks you, when you explain that you have to put the money in the new rules, you have to put the money in a trust account, you can only pull up into your general fund what you learned. You all know that one of the new rules is very specific about that we used to be able to to say you're giving me $5,000 to ensure that I'm going to be ready for you when you need can't do that anymore. You have to put it in a trust account. So then the client says you will will I get interest from Does the client get interest from trust account money? No, we all know where to go. It goes up to the State Bar,

1:00:09
it goes to the state bar, which sends it to the legal aid fund. So if you're like, if you're a defense lawyer, and you have like your iolta account, you know, it must be great knowing that your money is going to the opposing side, you know, your that your interest is paying for the opposing side, you can you can tell the opposing side that I'm paying your bill.

1:00:39
Let's see.

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All in one productivity software. So people have mentioned Cleo, I guess Cleo has a lot of advertising here. I use my case, my case has like a local San Diego office. There's practice Panther, rocket Mater, and Mike his case here. All sorts of different stuff. Many of them have like a free monthly trial. And, and then after that, it's like 50 to 100 a month per user, depending on what the user is. So some of them have like a lower rate for legal secretaries or paralegals or something as opposed to attorneys. And the advantage of doing these sorts of things is they have calendaring. You know, blowing at statute limitations is number one, or number two, on malpractice suits. You know, please don't do that. They have like checklists and tasks, so that you can figure out what you need to do on your case, they have document assembly. So kind of like on the form software, you put in your clients name and their address, and their matter. And then, you know, like, I put in like claim number and insurance company, name and policy number and then book, the letter of rep comes out for each case, it's

1:02:16
a violation, the State Bar gets us on. The number one is, for 20 years has been communication issues with the client, not with a client, see, my lawyer never calls me my lawyer never talks to me,

I didn't know any, which is what we're talking about. Document emails, you know, billing, spoke with Mr. So and so not with client, but put the name down, and so forth. Just be defensive, and know that someday, if you're in there long enough, you're going to get that same letter I've gotten a few times, the State Bar wants you to resolve the issue. And my suggestion to it's not in the seminar, my suggestion to, if you get that dreaded letter, respond the same day, Tommy got the letter you're working on. I've talked to so many investigators with the State Bar. And they say that, that if the biggest problem is, is the lawyers don't respond, and you have to keep writing. So respond, you know, your and, and try to get some sleep. Okay?

1:03:37

The due time tracking, a lot of them will do your time tracking for you. And then you can put it into an invoice like it combines the several steps, so it's less intensive, you can put them into an invoice. And then they also do payment processing. So you can just email the invoice to the client, and then a link will come up. And then your client can put in their credit card number. Or if they have, you know, money in their checking account, they can do an E check, I think 90% of the time I get like a credit card or debit card payment as opposed to an E check. And then you get your money in your you know, your operating account later. Or in your trust account depending on what you're asking him for them.

1:04:20

You also have to pay when they transfer from their bank to your bank. service fee. I don't think

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for each check. I'm pretty sure it's less I don't know if there is

1:04:32

I mean, I think about yourself till the client, you know when they come. I mean I always tell them. I gave a talk over at Cal Western I was taught in the they asked me to send your 30 years of being a lawyer. What's the most exciting thing that it's happened? Tell us an exciting thing and I said I'll tell you it happens every once in a while when a client says Do you accept cash? You know, these groups looked at me and I said You know, you still got to put some food on the table, folks. So I don't particularly care for paying the credit card company 3%. But if the client pays you through a check, I don't get charged back and goes, 100% of it goes into my checking account, if they do their check to your check. And there are several programs that do that every bank has one. Right? On Venmo, for just like smaller.

1:05:29
For Venmo, you can use Venmo. But one thing to remember is that Venmo debit transactions are reversible. So it's kind of close to a credit card. So if someone's making a big payment to you on Venmo, just be careful that they don't reverse it.

1:05:46
They also have Venmo also had I'm not bad mouthing Venmo a lot of people who use it, but they also had an issue last year where they were somebody broke in and got a lot of their data. And so, you know, make sure because then if something happens with your money to state bars gonna get a charge. I mean, it's a good service, but I, I'm just worried about it. Now, what do you do if somebody likes it?

1:06:19
Well, if what he means if someone tries to do a chargeback on you

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called a MasterCard.

1:06:29
Okay, well, if someone does a charge back on you, then you get your own chance to dispute it, too. If you use this state bar compliant systems, if they do a chargeback, it won't get charged back to the iolta account. It'll be paid, it's supposed to be paid out of your operating account. And then, you know, then it's up to you to basically fix the the amount in your iolta account. Because if the chargeback goes through, I think you should take the money out of your iolta account, you know, put into the operating account, since it's not the client's money anymore. They already got it back. But yeah, the question was, what do you do if you get a chargeback?

1:07:14
or other issues with that related to representations?

1:07:19
What do you mean? Is this person going to be your client from from your aid? Or is there just disputed that one transaction? Well, I know it depends on what the chargeback was about. Right.

And like, if it was the initial retainer, then, you know, I wouldn't even like it's it's someone, you know, I hadn't really done any work, or even just a little bit of work, and they wanted me out. I'd be like, okay, you know, like the one hour of work $300 is not worth the hassle, just you know, customer service. You know, you go to the restaurant and the food isn't good, they give you a free meal. Consider it like that. If it's a big bill, then you can dispute it, but it's a lot of hassle for you. Yeah, I

1:08:05

mean, this is a real issue. I mean, in criminal law, I tell the clients, you know, if you mess with me, if you if you don't pay, if we don't cooperate, you have to be a little bit less poetic with criminal and criminal. And if you don't pay an I have a standard, I say, I'll be embarrassed in court. If I have to, you know, to try to get out of this case out. I'll be embarrassed in court. But I'll be able to eat anything I want for dinner and you won't. So many, many years ago, we used to be able to many, many years ago, we used to be able to say in court. I don't know. I guess this is all right. We're not going to do anything to me. I'm 80 years old. But anyway. We used to say Mister, I still have to interview Mr. Green, Your Honor. And the judges knew that that meant you were still owed money. And you could get a one time extension on the case. Can't do that anymore. You say who's Mr. Green?

1:09:17

And then, just as something to add to your question, like, if someone does a charge back to you, like what is that work on your, you know, attorney client relationship, like the clean way to do it would be refund the money and then file a suit in small claims for up to $10,000 for whatever they you did work on that you didn't get paid. Because if you sue your client for unpaid bills, then like some insurance, some malpractice insurance carriers will use that to set your rates because they think that you could get countersuit for malpractice or perhaps you're not good at communicating with clients and You're, you know, a claims risk for them. But they generally exclude Small Claims suits from that.

1:10:06

What are you going to? What do you think your clients gonna do in many cases, if you sue them, you're going to end up being sued back from Alper Adele just I've done it twice, twice. I've gone to small claims court twice. The person has said, you mail, they got ahold of some other lawyer, that's a tool for malpractice. He's got insurance, both times persevered. In fact, one time the State Bar judge said, Your problem is fail. You didn't charge enough, the guy didn't respect you. So but learned, I don't have to tell you this, just learn to swallow it instead of using small claims. And we have a small claims clinic right here if you need. Anyway. That's my advice to sorry, go ahead.

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And then just to just to follow up on that, it seems like we would probably want to also make send a letter to that client say, it appears that you know, you've severed our client attorney relationship, you know, yeah. Some type of personality on that.

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Yeah. But well, this is not a legal ethics seminar. But yeah. When the legal when the relationship ends, you should send a letter, advise them of any statute limitations, or anything that needs to be done. If there's work that is in progress, you know, you should give them the case file so that they can finish it. You know, all this other stuff

1:11:30
ended Priority Mail, by the way, it costs you five bucks. And also, I don't know if we posted stuff here. We're not going to get into ethics, but we want you back, right?

1:11:47
Internet? Yeah. Does anyone here remember life before the internet? Those are fun, you know, that when Facebook was an actual book. And web meant a spider web. So anyway, web hosting. If you're gonna be your own attorney, you should probably have a website. If you don't, you look kind of like a dinosaur. Everyone, when they want to hire a lawyer, the first thing they do is they double check to see if there's a website. So you know, have one there's different ways of doing the website. Like some easier ones that the do. So wiziwig, what you see is what you get are or like Squarespace or Wix, they have like free versions that that you can use that it's like a drag and drop template and you've moved stuff around. And then then you just click OK. And then you have a website. Now the problem with those tools, they're proprietary, and they're not as optimized. So the web pages tend to be slower, their SEO is not as good some of them may have paid paid templates, the hosting may cost more. But if you're just starting out and you don't know anything and you don't have a lot of time and money to get started, you should you know consider

1:13:26
one of those first you can put Pay Pal I have multiple say that say do not pay pal and I are going on one day face off. But anyway, you can pay pal will do it for you for free. Or you can go with I think a couple of the other companies banks, you can put on your website, a button to make payments. And this forces and that's what I told clients that will go to my website. Here it is and

you can pay from there it forces them to go to the website and they can read more about you and look at all the great things that you've had your friends put on there. And, and so but it forces people in your website and by the way, once a month whenever if you're doing it by hosted place, you'll be getting a traffic report of some kind take a look at it. First of all, you'll find it most calls it from an 800 number from somebody trying to sell you something but take a look and see what the geography is of people calling you. It's interesting

1:14:34
if you have more funds or perhaps you're more tech savvy you can you know the pros use a WordPress website

1:14:45
but don't put a column with a with the Hall of Justice is you every every lawyer has the same day I have a picture Yeah. I have one have a jail cell opening it up. People are coming.

1:15:01
Although I took the Hala justice on myself, Oh, when I get to save on the copyright royalties that way, all of in justices. Yeah, WordPress, all the big pages like, you know, CNN, CNBC, they use WordPress as their underlying, you know, like tool, you can hire someone to do it, it's like 1000 bucks or something. And then generally, a lot of them charge like a monthly fee for maintenance, which boggles my mind, like, it's on someone else's computer. What maintenance is there. But that's how they do it. And then to host it. There's a lot of hosting companies, one of the oldest ones that went public A long time ago now is GoDaddy. And then there's newer ones, Bluehost and hostgator. It's like 1020, a month, something like that. When you first open your web page, they give you a big discount. So they'll say, do you want to buy three years, and it's only $10 a month, or something like that. But then when it comes, when the three years is over, they're like, Oh, well, now it's like 50 a month. So if you can, you know, try getting it for more number of years to lock in the discount, because they know it's a pain to to move your webpage five years later, you know, like the one gigabyte and stuff that's in there to a different company.

1:16:36
Which which brings us if you have a domain name, I mean, my website is p shapleigh. So, and I was using email, I mean, Gmail from my aim, and it's occurred to me that that looks lousy. I mean, Gmail, a client gets something with your name and Gmail. So I'm starting to, you know, I think for marketing purposes, to use your domain name. It just looks more professional. Now, some lawyers, I've gotten their email, you get arthritis, by the time you get done typing their long, you know,

lawyer who practices in San Diego and enjoys the sun calm. You know, so keep it simple, but make it descriptive, but use for your email use, use your domain name or some name other than Gmail looks better. Right?

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And if you love Gmail, like you can have, you know, Google running your email server, you know, it's, it's like 10 or 20 a month or something like that. G Suite. Yeah.

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Supposed to be a lot more secure than G. Don't use Outlook and don't use aol.com. Yeah, please. No. aol.com. Your mail you have you have mail. Then those days? Yeah, no. Yeah. Yeah.

1:18:08

Facebook page, might as well have a Facebook page, if you know how to do it, it can be great. This is not a marketing presentation. So you know, it can be part of your marketing.

1:18:21

To have a Facebook page. I just have to say before I can sleep tonight, if you have a Facebook page, don't let it sit, you know, bring it up and look and see. Because some people that are angry with you, or maybe angrier or you think you're somebody else, put something on there, that really is inappropriate. And that's the first thing I do when I get a new client is I look on their Facebook, and on their social media. I see some guy that got a DUI, and he's got the Facebook holding up a pitcher of beer, you know, and stuff like that. You know, that's all discoverable Facebook and so forth. So be careful. What's yours? What's on yours? And what are your clients? Right? Yes, ma'am.

1:19:10

Sure. And then there's Google Plus is not around anymore. It got discontinued. Does anyone here remember Google Plus? No, I guess it was. They didn't market it very well. Google Plus was Facebook. Sorry, Google's attempt to make their own Facebook. I think they'd started like three years ago, and nobody used it, and it closed down this year. Good. Unfortunately for that question, we had a question over here. We do have a question

1:19:42

that came in late so perhaps you covered in the beginning, telephones just having one phone that

you use for both.

1:19:51
I will get to that. Next. Please remind me though in case I forget, since my wife reminds me all the time that my memory is not that great.

1:20:02
By the way, Google

1:20:05
Google Plus is not around, but there is like Google Maps. So you know, no matter where you are like, you have to meet a client in physical space eventually. So like, you can have like a Google Maps pin of your law firm. And then you can put some pictures of yourself in there. It's, it's good for marketing and makes it easier for you to be found. I didn't put that in there. But you should do that.

1:20:31
If any of you have gotten phone calls from a company that says that they're a golden Google, whatever, and and Google one or two on page one of Google, that's got to be the biggest page in the world. Because every lawyer is going to be on page one, I tell them that I want to be on page three, how do I arrange that? That becomes the end of the phone call? I said that 100 times.

1:21:01
Okay, that that was like next is what's your insane? telephones. A lot of lawyers use a messaging service for after hours calls. Like, you know, you can decide to use one or not. Since clients, you know, seem to love calling at seven 7pm on a Sunday, and not leaving a voicemail. Cell Phone only. I know it's some more common criminal lawyers. Trying to remember the name of that movie. What's that movie with? Like Matthew McConaughey, the Lincoln Lawyer. Yeah, that one I love that movie. But the Lincoln Lawyer he his office, his his Lincoln, giant car. And then he has like a chauffeur drive him around the court and stuff in his like files are in the back of the back of his trunk or something. He gets like drive to the jail and meet his clients. And he only needs a cell phone, he doesn't actually need a physical office or anything. So some Criminal Lawyers can actually do that. Like, they just have that cell phone. You know, they get some calls, sign up the new client, get the retainer. I mean, I don't know if, if that's true. But that's what I've heard from a few.

1:22:23
I have my cell phone on my business card for a while. But I learned a lesson.

1:22:31
If you do use your cell phone, you can also set up another alternate phone number on through Google Voice and connect it to yourself. So you know when it's your business line. And that's great. Yeah, that is

1:22:45
that's on the last. That's on the last line. Yes, thank you. Skipping ahead. The common was like if you if you just have one cell phone, you can set up a separate phone number, which, you know, that's on the end. Some people have two cell phones, because you asked a question earlier, and I'm doing it for the recording, like whether you have one cell phone or two. My business partner has two cell phones, you know, so that if he gets a call on one, and it's like, after hours, I get voicemail, you know, like, and then they call five times like, Okay, well, maybe I have to take this and hopefully it's not wasting my time. You know, you can have a landline. at&t actually still does landlines. But there's also the cable company can do your landline. It's more for like if you have a fax machine. You can do a voice over IP, landline. There's different companies that do that. You know, tried several of them to see what works, don't sign up for a long term contract. can't emphasize that enough if you'd sign up, because there will not do that if you sign up for a three year contract with a really crummy company. And then they're dropping your calls all the time, you'll be very unhappy, your clients will be very unhappy.

1:24:11
So you know, you go into Starbucks, and you can use their public Wi Fi. Be very careful with that. And especially if they not necessarily Starbucks, but if you go into a public place and they say do you want to use a Wi Fi? And it's $10 and $5. If you get consumer reports that tell you that's a heck as a big scam that these these are oftentimes people stealing passwords and stealing information. So, you know, Starbucks, I would suspect is probably trustworthy, but be very careful on it public that these public hotspots

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and Have you considered in the hybrid system that you're using just one phone, it helps to have two separate phone numbers on the phone. So you can use Google Voice, you can use Skype. And then this way, after hours, you can disable the business phone and just let it go to voicemail on

and not get bothered. If you have a cell phone, you should probably get one of those blocking apps for all that spam callers. There are so many spam callers, and they call in all sorts of different languages. You know, please know what language I'd speak before you spam me, I don't know. Or maybe I can learn a different language from them. Storage. Okay. Almost done. Model rule 1.6 c requires a lawyer to make reasonable efforts to prevent inadvertent or unauthorized disclosure of clients information.

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So,

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you know, like physical spaces, getting more expensive, you know, every, every year, especially in San Diego. So our office tries to do it, you know, we scan and store a lot of that stuff on the cloud. There's a ton of different services for that. There was like a race in cloud storage of people, you know, outdoing each other to see how many gigabytes free that you can get, I think it was they were up to like 50 or something,

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or 100.

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But then they're like, back down again, I think it's like 20, gigabytes free, something like that. Dropbox, Google Drive G Suite.

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What's the What do you think's the recommended amongst these computer magazine? What's the recommended size of your office computer? How many? I pushed my first one was 10k. But but they want you they suggest is 256. gigs. Yeah, whatever happened to, you know, small letters, one page. But anyway, yeah.

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There's a bunch of different cloud services, you should try to find one you like, if you're using Gmail for your, for your email on your website, like you might have G Suite included for free. So that'll save you. One thing is, you can, you can toss out an old document after you tried it. But one

big exception is estate plans. If you have an original signed estate plan, you cannot throw it away. It's illegal. You know, so don't take your clients original signed estate plans, give it back to them. I talked to this old attorney, he's like, yeah, we have this whole room full of old wills and trusts that we're not allowed to throw away. And, you know, we're mad, because the partner that did estate plans retired. And these are all of his old files that are sitting in there, like, you know, costing the firm like a fortune to, you know, definitely don't, you know, keep those papers, state plans. What's the best way to handle that? Your fee retainer that you're going to be giving the client the original? Or do you have a separate document, I just give it back to them? You know, and I mean, I'd scan like a copy and stuff. So you know.

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So it's not done, it works? Well.

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Because it's kind of a PVS operating document and then

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save it on your computer then, like uploaded to

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cloud? Is there anything that you think that works best?

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In your own personal practice on how

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to make sure that you've got constant update of stuff that's backed up?

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So the question is, like, if you're dealing with a document and you want to make sure it's updated, or backed up, or whichever, and so that question touches on two different things. So one is like, you know, having a backup, like a lot of these storage things, if your files are saved into like, you

know, your, your sink box, then automatically update. And then the second thing your, it seems like you're talking about is version control. Because if you have like one document on your desktop, and you're working with them one in your sink box, like those will be two different versions. Especially if you're working in a team, and it's it's a mess to have different versions of the same motion.

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I think you should and you should have I I've done it and because of Almost losing my mind when my computer crashed. And I thought of 30 years ago, I had a backup 256 gig backup this, you can get a Costco for 70. And it's plugged in all the time into my hard drive. So every night, it's making a duplicate of everything I've got on my computer. I mean, in the old days, when a hard drive went out, you just left and moved out of the country. But now Now, of course, it's digital. And so, you know, you don't necessarily lose it. But I still remember that sleeping when that hard drive crash.

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Yeah, like, they call it hard drive crash, because the hard drive is a magnetic disk. And then there's like, a head that looks like a record player that goes on top of the thing. And when it crashes, that means the little record player thing physically crashes into your hard drive and wipes out all your data. And that's where the term comes from. But yeah, you got to get it backed up

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the digital. If you can call up some and have your hard drive, if you have the old spinning type, like I have, have it changed to a to a digital hard drive. And yeah, solid state. Sorry, go ahead.

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So I started right now everything in the cloud. And you know, just, I haven't slept that way. And I did need to work on my hard drive. And But you just said something you said, download everything from your computer. So I'm really safe in the cloud, it should automatically take off, right?

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Yeah. So right, yeah, that's what I was talking about, like depends on how you set up your working, like, it'll sync between the cloud in your own work on the desktop. And some of those different ones have, you know, a version control, like we use Dropbox, if you dig in deeply in your Dropbox,

and you're working on the same file over a week, it'll save several different versions of the file that you're working on. Like, if you realize like, I don't know, maybe your kid got on your computer and typed a bunch of stuff on topic or emotion or something like that, that you could go back and find the old version of it's not too far back, and then recover it. You know? I think this is from the old presentation. So you know, if anyone has extra stuff to talk about,

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let me just say this is a marketing thing. And I guess it's not really in this, but I gotta say, somebody comes in your office and, and wants a will or a trust done, and I don't do wills or trusts it? Do you say I don't do wills and trusts, I'm sorry, and they leave. If you do, then you're better, you better marry rich, because they have a list of referral people that you trust, and have this because that client in two years is going to have something in your area. Don't ever let somebody leave. So I have a list of all referral of each kind, that we have the different kinds of law, I know that I'm not going to do well in trust anymore. So have people that you can trust to do the wills. Thank you. I've got a sheet that has plumbers on it over the years. We've never had a good experience and a client comes in that's just moved into town. I'll say if you need some good names. You know, these are all things that maybe a client will think well of you in a couple of years when they when their sons in jail. didn't marry rich. or stop working? Yeah. Are you folks involved in virtual office space? Yeah. Someone told me was that might be a violation the user Wi Fi. Have you ever seen? Yeah, I mean, there's a was a really good article in one of the State Bar of committee in the Criminal Law Section. And it is an issue, especially if you have knowledge that they've had problems getting getting scammed. You know, it's all that's what state bar is going to come at you with is that you should have known what, you know, sometimes you so they can come back on you and ask you, if you if you were aware? Well, I just I mentioned Starbucks, because that's probably everybody's, everybody's been in one. I don't know, when it doesn't go to the next I drink tea. And in terms of this, if you want to talk about

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virtual workspace, in the, in the olden days, they call in like vegan sweets. Yeah, sorry, if even it's a bunch of lawyers sharing office together, and they're not in there all the time. And they just have like a table, and then all the rudder guides and stuff around one wall. You know, like, the rent is cheaper, you get to work with other lawyers and share ideas and referrals. Especially if you're a litigator, like you know, litigation is lonely, and it's good to have other people there to bounce ideas off and then work with, then there's, today we we work, I still don't know what we work does, but it looks kind of similar to that concept.

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It's good for I mean, there's certain kinds of law work, a virtual office is a is a empty space, it's just dynamite for these office building, where they can't get enough people to come in. So they set up and people large, you'll rent it for a day. And you'll have clients come in, and they're impressed with this. But I you know, don't underestimate I know, there's one lawyer and she's a young lawyer, and she's got a business card, she's got up and down the state of California, she has offices and I can, I can see the address is their virtual office. And, and but I, you know, I would hope that she doesn't have clients that see that, but virtual offices are very good I, I spent eight months here in the law library sitting I'm sorry, like, sitting down there, and I see somebody looking up something and I, if they were dressed nice, like, Hey, you need any help. Receiving mail at the location where you're just, it's a good point. Don't underestimate the first place, it's, as you probably know, it's against State Bar rules do use a peel box. And although they've just changed, it used to be you couldn't use a peel box, in your headings, emotions, and so forth, it had to be a place that you couldn't see receive service, the zoo, state law, well, I don't know if state law but the new state bar rangement made is that ups stores and the stores like that, that have these mailboxes, they have to accept service. And they're considered to be an address for service. The government refuses to do that with peel boxes with with your so you can't use a peel box. You know, US postage. But you can use ups stores.

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If you're if like with these virtual offices, as somebody who has offices in various cities, you know, he or she's not going to be in all of those places at once. So if people are sending mail or clients to check on their services, learn about things for people with scan in the mail and you receive it electronically.

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There probably are, but I haven't used one yet. Like a virtual office is good if you have to be in different cities, right? So like our main offices here in San Diego. And then we have like a virtual one in Irvine to meet, you know, some orange county clients. And once for whatever reason, someone mailed to our Irvine office instead of our San Diego office. So I'm like, Where's my package? And then they're like, Oh, we mailed it to your office. I'm like, what was the address? And like, oh, shoot, I just called the guy in Irvine. Like, can you please, you know, mail that to less than San Diego? You know, I mean, we do go there like, I don't know, once a month or something. And then they just mailed it to us. Don't Don't fall for and I say this because I've done it. Though. I've had it one time I had eight different lawyers mailing stuff to my ob using my office as a mail drop. And you know, I never had printing money. I thought that's I just did as a favor, but you're gonna find yourself. You know, they're calling you you're getting up, you're signing FedEx for somebody else to still do it. Because it's tempting. But don't let other people you service where

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somebody can get my mail. But you know, just from time to time sort of things that we're scanning things are interesting to me. But I feel like there would be issues because whoever's doing it is opening

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its confidentiality and stuff. And yeah, I don't know how that will, I would just pick it up. Since you know, I don't want other people that see it.

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Like I say, you can use you can use. I know, when I get a new emotion, and it's not a DA or when it's a private attorney, one of the first things I look at their bar number to see just how young they are probably, but also, I take a look at their address. And I'll generally Google it. I hate to use that word, I generally Google it and see if it's not a UPS Store. That gives me more momentum. But, you know, there's times where you have to use what you have to you. was somebody over here to question? Are you aware of the cloud ever? Having been compromised? I'm waiting for that cloud before let's hear about the Neanderthal period. I don't, I don't know that it's

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been what the cloud is. It's a human thing. So it's fallible, of course, it's been compromised, like Experian got hacked and they have, like, you know, all of our social security numbers in there. The rule is only that we have to follow like reasonable, you know, precautions on something like that

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Don't put your clients to another, and this is going off track but rather just put the last four numbers of associate Curie number but x x if they don't, like, you know, I mean, I you don't want to be the one that gets broken into and all that so security them so just use the last four numbers. There's 9000 places that get the whole social security number if they want but shouldn't be from your office. Now we got y'all scared about doing this.