

ALABAMA STATE BAR



# ANNUAL MEETING

20



17

GRAND HOTEL

POINT CLEAR

July 12-15



## Welcome to the 2017 Alabama State Bar Annual Meeting!

A few weeks before the 2016 annual meeting in Sandestin, I was finalizing the agenda that I wanted the Bar to pursue during my tenure as State Bar President. As I reviewed the ambitious agenda, I asked myself what did all of these projects have in common. Some of the agenda items dealt with helping members of the Alabama State Bar, other items were directed at helping people that lawyers serve and still others involved helping our Association.

At the same time, I had just finished teaching a lesson on Luke 10, the story of The Good Samaritan. With that story in mind and with the agenda before me, it was clear that this year would be devoted to the idea of “Love Your Neighbor”. With the approaching 2017 annual meeting, my year at the helm is almost complete. The 2017 annual meeting is a culmination and reflection on how well we loved our neighbors this year and what we can do to improve in the future. I am glad we can celebrate our achievements this year and determine how we can carry this idea forward during our annual meeting at The Grand Hotel in Point Clear. My family absolutely loves spending time here. It exudes an aura of warmth and southern charm. Visitors are relaxed and wonderfully content as they stroll around the beautiful and historic grounds of The Grand Hotel. The activities available at the hotel cater to those who prefer doing very little to those who want to be adventurous. For example, some will want to enjoy the world class spa while others will want to take advantage of a fishing expedition in the Bay.

In this setting, we will gather together to fellowship and learn. The meeting this year is programmed around four tracks – Business of Law/Technology, Future of the Profession, Helping/Service to others, and Mind, Body, Spirit, Wellness. Some of the speakers include:

1. Dr. Jack Hawkins who will give us insight into the future of education and how it affects the law profession
2. Brent Buchanan, president of Cygnal and one of the most well respected political strategists in the nation, talking about public service in the political arena
3. Ashby Pate, an exceptional Alabama lawyer, who will inspire all of us to “Be The Light”
4. Pam Bucy Pierson, an extraordinary teacher, helping us understand the business of being a lawyer
5. Michael Ethridge, a visionary lawyer from South Carolina, who created and developed the best health and wellness program among Bars in the United States
6. Attorney General Steve Marshall who possesses the integrity and intellect to pursue justice and mercy on behalf of Alabamians

In addition, there will be some wonderful opportunities for each one of us and our families to fellowship together. I am most looking forward to President’s Closing Night and Children’s party. The food will be good and the children’s activities will be fabulous, but the highlight will be the band, The Main Attraction. This band from Atlanta will ENTERTAIN you and your family. I know that my wife and kids will likely be the first ones on the dance floor.

I hope you greatly enjoy the annual meeting this year. I look forward to spending time with you.

Sincerely,

J. Cole Portis

# MAXIMUM ATTAINABLE MCLE CREDIT A T - A - G L A N C E

Wednesday .....	5.0 credit hours
Thursday .....	5.5 credit hours (includes 2.0 ethics)
Friday .....	5.0 credit hours
Saturday .....	2.0 credit hours
Wednesday – Saturday .....	17.5 credit hours (includes 2.0 ethics)

NOTE: A total of 38 hours of MCLE credit programming is offered during the annual meeting. MCLE materials are available on-line at [www.alabar.org](http://www.alabar.org) to all attorneys who register for the annual meeting. Some workshops and seminars will have paper handouts of MCLE materials in addition to the on-line materials.



**During your stay** we encourage you to take time to enjoy the world-class facilities of the Grand Hotel Point Clear Resort & Spa Marriott. Resort activities include bike rentals, biking trails, jet-skiing, kayaking, sailing, jogging/fitness trails, sauna, table tennis, horticultural and historical property tours, fitness center, resort shopping, volleyball, horse shoes, Fairhope historical bus tours, croquet, tennis, children’s program, salute to the military and firing of the cannon at approximately 4:00 pm near the croquet lawn followed by afternoon tea and cookies in the lobby rotunda, golf, fishing poles and bait, driving range, food for the resort’s resident ducks, morning coffee in the lobby, and a bayside putting green. For further information call or drop by the Concierge’s desk located in the main building near the registration check-in.

*Look for our specialty beverages throughout the annual meeting:*

- Captain America
- Mobile Bay Sunset
- Grand Bourbonade
- Upscale Mojito Twist



AWARD-WINNING LUXURY IN

# MAZATLÁN

Alabama State Bar 2017 Annual Meeting  
Grand Prize Giveaway



## REGISTER TO WIN

A WEEK LONG TRIP IN MAZATLÁN, MEXICO AT THE EMERALD BAY PUEBLO BONITO

### 3 BEDROOM 3 BATHROOM PRIVATE VILLA

*with your own pool and hot tub with daily housekeeping service*

All brought to you  
compliments of



# CLE TRACK PROGRAMMING



**Business of Law-Technology**



**Future of the Profession**



**Helping/Service to Others**



**Mind. Body. Spirit. Wellness**

## Alabama State Bar Annual Meeting

**WEDNESDAY, JULY 12, 2017**

*NOTE: All functions are in the Conference Center unless otherwise noted. The Card Room, the Lagoon Room, and the Sky Lounge are located in the historic main building above the lobby rotunda. Some events may be held outside.*

**10:15 am – 12:15 pm**



**KEYNOTE PRESENTATION: Law-Justice and the Holocaust - The Role of Judges in Safe Guarding Democracy**

**(2.0 hours MCLE credit)**

**Joint CLE with District and Circuit Judges**

(Open to all annual meeting registrants)

*Grand Ballroom North*

Speaker: Dr. William F. Meinecke, Jr., Washington, D.C.

*Sponsored by the Alabama District and Circuit Judges and the Alabama State Bar and presented by the Law, Justice and Society Initiatives, United States Holocaust Museum, Washington, D.C.*



Meinecke

**Noon – 6:00 pm**

**Refreshments upon Arrival**

*Grand Ballroom Foyer*

*Sponsored by the Litigation Section of the Alabama State Bar*

**Noon – 7:00 pm**

**2017 Annual Meeting Registration**

*Grand Ballroom Foyer*

**1:00 pm – 2:30 pm**

**Alabama Law Foundation Board of Trustees Meeting**  
*Sky Lounge, Main Building, Third Floor*



**1:00 pm – 4:00 pm**



**Poverty Simulation & Economic Justice Seminar**

**(3.0 hours MCLE Credit)**

*Magnolia Ballroom 4*

(Pre-registration required)

Speakers: Kristina Scott, Executive Director of Alabama Possible, Birmingham; Caren E. Short, Staff Attorney, Economic Justice Project, Southern Poverty Law Center, Montgomery; Emily C.R. Early, Staff Attorney, Economic Justice Project, Southern Poverty Law Center, Montgomery

Alabama Possible is a statewide nonprofit organization that seeks to remove barriers to prosperity in Alabama through education, collaboration, and advocacy. Their research-driven work is designed to broaden relationships and enhance capacity building, with a focus on addressing systemic poverty. This interactive course requires a minimum of 37 participants and will accommodate a maximum of 80 participants.

*Sponsored by the Volunteer Lawyers Program of the Alabama State Bar*



Scott



Short



Early

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**WEDNESDAY, JULY 12, 2017**

*(Continued from page 5)*

**2:00 pm – 3:30 pm**



**Effective Memory Skills:  
Making Your Case with a Better Memory**

**(1.5 hours MCLE credit)**

*Azalea Ballrooms C-F*

Speaker: Paul Mellor, Success Links, Richmond, VA

**General Session:** Our speaker presents highly interactive, informative, and fast moving seminars on Memory Skills throughout America. His passion for teaching has helped improve the minds of attorneys and legal professionals by showing them they can be more productive and efficient with a better memory. Participants will take with them the ability to remember names and faces; the confidence for getting through a day without the fear of forgetting; and the knowledge and application to retain information. You'll learn from a memory master how fun and easy it is to remember names and faces, speak without notes, beat absent-mindedness and gain control of your day without the fear of forgetting. The answers are already in your head.

*Sponsored by the Alabama State Bar*



Mellor

**3:00 pm – 4:30 pm**

**Board of Bar Commissioners' Meeting**

*Azalea Ballrooms A-B*

Guest Speaker: Artur G. Davis, Esq, Executive Director, Legal Services Alabama, Montgomery



Davis

**3:45 pm – 4:00 pm**

**Procession to Daily Firing of Cannon**

A tradition at the Grand Hotel. Listen for the drums, and watch the parade around the Grand Hotel grounds, concluding with the firing of the cannon near the croquet lawn. A salute to today's military and those who have passed through this historic resort.

**4:00 pm – 5:00 pm**

**Afternoon Tea at the Grand Rotunda, Main Building**

Join friends for complimentary afternoon high tea and cookies. Service is fireside which is decorated with an eclectic mix of Oriental exotica and English traditional furnishings.



**6:00 pm – 7:30 pm**

**Opening Reception and Family Night Dinner, Pool and Beach Party**

(No charge for registrants and children 17 and under – \$35.00 for additional adults 18 and over)  
*Pool Beach (Grand Ballroom North backup in case of inclement weather)*  
Outstanding food, music and fun for adults and children  
*Sponsored by the Alabama State Bar*

**6:00 pm – 7:30 pm**

**Balloon Artists and Games**

*Pool Beach (Grand Ballroom North backup in case of inclement weather)*  
*Sponsored by the Alabama State Bar*

**7:45 pm**

**Ringling of the Bell at Sunset**

A southern tradition that signals the end of the day and the beginning of the evening. Let the bell's toll remind you to enjoy a family evening at the Grand Hotel and create memories for a lifetime.

**8:00 pm – 9:00 pm**

**Rock & Roll BINGO Family Fun**

(No charge)  
*Sky Lounge, Main Building, Third Floor*  
Fast, Fun, Interactive! Bingo with a twist. 45-second song clips and hints instead of numbers.  
Listen in; Sing along; Rock out!  
Perfect for ages 10 - 100.  
*Sponsored by the Alabama State Bar*



# THURSDAY, JULY 13, 2017

**7:00 am – 8:00 am**

**“Friends of Bill W.” Meeting**  
*Magnolia Ballroom 1*

**7:00 am – 11:00 am**

**Bay Fishing**

(\$160/person – includes 4-hour fishing plus refreshments)  
(Ages 12 and older) Pre-registration required – all equipment and artificial bait furnished  
*Meet at the Marina at 6:45 am*

**7:30 am – 5:00 pm**

**Registration**

*Grand Ballroom Foyer*

**7:30 am – 9:00 am**

**Continental Breakfast and Coffee Bar**

*Patio*

*Sponsored by the Regions Institutional Trust Services*

**8:00 am – 5:00 pm**

**Legal Expo 2017**

*Grand Ballroom South*

Meet representatives from suppliers who tailor their products and services to the legal community. Be sure to have your drawing card signed by the exhibitors so you can enter to win prizes!

*NOTE: The Legal Expo is intended for registered lawyer attendees and their office administrative staff. We regret that children unaccompanied by a parent cannot be admitted to the Legal Expo.*

**8:30 am – 9:30 am**



**PLENARY SESSION:**

**Wellness for the Profession:  
Strategies and Activities That Work**

**(1.0 hour MCLE credit)**

*Grand Ballroom North*

Speaker: R. Michael Ethridge, Attorney at Law, Charleston, SC  
The most intelligent, gifted, thoughtful, and ethical people we know are lawyers. Even though the actual practice of law can be crazy-making, lawyers themselves are a rather remarkable group. Nevertheless, our work can be soul killing, and our profession is frequently maligned. Why is it that there is so much suffering among those involved in the practice of law? How can such a remarkable group be held in such low regard in our communities? And what's to be done about it? Most importantly, what would happen if lawyers began to



**Ethridge**



engage each other in honest conversation around these questions? We start this conversation today.

*Sponsored by the Alabama State Bar*

**9:00 am – Noon**

**Kiln Company (pottery)**

**Playing in the Mud**

(Ages 10 – 17) (\$40/person)

*Sky Lounge, Main Building, Third Floor*

Learn to make a pinch pot step by step in this three hour educational workshop. Clay is a tactile medium. Come work with clay making two vessels and learn the complex process.



**9:30 am – 9:45 am**

**Break – Visit Legal Expo 2017**

*Grand Ballroom South*

**9:30 am – 11:30 am**

**Refreshments**

*Patio*

*Sponsored by Rimkus Consulting Group, Inc. and the Alabama State Bar*

**9:45 am – 10:45 am**

## *Breakout Sessions*



**Seersucker and Civility: How to Dress and Behave Like a Lawyer**

**(1.0 hour MCLE credit)**

*Magnolia Ballroom 4*

Speaker: William H. Haltom, Jr., Lewis Thomason, Memphis, TN

Mr. Haltom is a trial lawyer with over 40 years' experience, and is former president of The Tennessee Bar. A popular speaker, he is the author of six books and has been a newspaper and magazine humor columnist for over 20 years. He has served as chair of the *ABA Journal*, as well as other magazines.

*Sponsored by the Alabama State Bar*



**Haltom**

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## THURSDAY, JULY 13, 2017

(Continued from page 7)

2017 Annual Meeting & Legal Expo



### How to Address the Reality of Alcoholism, Addiction, and Mental Health Issues Among Alabama Attorneys

(1.0 hour MCLE credit)

*Magnolia Ballroom 2*

Speaker: Robert Thornhill, Director, Alabama Lawyer Assistance Program, Montgomery

The incidence of alcohol use disorders, stress and anxiety among attorneys is on the rise. Come hear how the Alabama Lawyer Assistance Program can be utilized to assist legal professionals.

*Sponsored by the Alabama Lawyer Assistance Program of the Alabama State Bar*



### Alabama Dispute Resolution: How Are We Using It?

(1.0 hour MCLE credit)

*Azalea Ballrooms A-B*

Moderator: H. Harold Stephens, Bradley Arant Boult Cummings LLP, Huntsville

Panel: James N. Walter, Jr., Capell & Howard, PC, Montgomery; Elizabeth Couey Smithart, Union Springs; Phillip E. Adams, Jr., Adams White Oliver Short & Forbus, LLP, Opelika; Melanie Merkle Atha, Cabaniss Johnston Gardner Dumas & O'Neal, LLP, Birmingham

*Sponsored by the Dispute Resolution Section of the Alabama State Bar and the Alabama Center for Dispute Resolution*



### Public Service in the Political Arena

(1.0 hour MCLE credit)

*Beachside Room*

Speaker: Brent Buchanan, President and Founder, Cygnal, Washington, D.C., Montgomery, AL

If you are considering public service



Buchanan

now or in the future, come hear one of the most knowledgeable political consultants in the industry. His firm serves as a resource for business owners, political candidates, and elected officials who are searching for “the right answers”. Learn how to navigate the landmines in this field. Lawyers render service – to their clients, their profession, and to their communities.

*Sponsored by the Alabama State Bar*



### Standardization of Legal Opinions Governed by Alabama Law

(1.0 hour MCLE credit)

*Azalea Ballrooms C-F*

Presenters: Timothy J. Tracy, Partner, Balch & Bingham LLP, Birmingham; L. Susan Doss, Partner, Bradley Arant Boult Cummings LLP, Birmingham

*Sponsored by the Business Law Section of the Alabama State Bar*

**10:45 am – 11:15 am**

**Break – Visit Legal Expo 2017**

*Grand Ballroom South*

**11:15 am – 12:15 pm**

## Breakout Sessions



### Lawyers in Search of a Soul: Building a Better Profession

(1.0 hour MCLE credit)

*Magnolia Ballroom 4*

Speaker: R. Michael Ethridge, Attorney at Law, Charleston, SC  
Mike has spent the better part of the last 30 years earning his living in the world of litigation. His practice focuses primarily on the representation of insurance companies and their insureds. As a



Ethridge





civil trial lawyer he has litigated cases in state and federal courts throughout Georgia and South Carolina, serving as lead counsel in numerous jury trials in both states. Over the years of maintaining a busy litigation practice, he has observed how difficult this profession can be. Even though he is still engaged in the full-time practice of law, he is committed to helping lawyers find ways to live lives that are healthier, more balanced and much more fulfilling. That is a lofty goal of most Alabama lawyers. Come hear from one of your colleagues in another state who might not have all the answers, but who has begun some serious exploration of the questions.

*Sponsored by the Alabama State Bar*



**Attorney Advertising in Alabama: The Concerns, The Law, New Issues and Effectively Marketing Your Firm While Maintaining Compliance with the Rules**

**(1.0 hour MCLE Ethics credit)**

*Azalea Ballrooms A-B*

Speaker: Mark B. Moody, Assistant General Counsel, Alabama State Bar, Montgomery

*Sponsored by the Alabama State Bar*



**Scams Targeting Attorneys: Will You be a Victim?**

**(1.0 hour MCLE credit)**

*Azalea Ballrooms C-F*

Speakers: Tazewell T. Shepard, Sparkman, Shepard & Morris, PC, Huntsville; J. Vincent Swiney, Swiney & Bellenger, LLC, Homewood

This program will highlight scams aimed at attorneys, from phony emails and counterfeit checks to bogus claims and settlements. The speakers will discuss actual examples of fraud targeting attorneys and the consequences of successful scams, such as the attorney's potential liability to his own bank and ethical concerns about missing trust account funds. The program will also provide ways to spot a potential scam and how to do business with real foreign clients.

*Sponsored by the Solo & Small Firm Section of the Alabama State Bar*



**The Alabama Budget and Budget Process**

**(1.0 hour MCLE credit)**

*Beachside Room*

Moderator: J. Othni Lathram, Director, Alabama Law Institute, Montgomery

Speakers: Senator Arthur Orr, Senate District 3, Decatur, Chairman, Finance and Taxation Education Committee; Senator Lee "Trip" Pittman, Senate District 32, Chairman, Finance and Taxation General Fund Committee

*Sponsored by the Alabama Law Institute*



**Business Law Section Annual Meeting**

*Magnolia Ballroom 1*

David D. Dowd, III, Burr & Forman LLP, Birmingham, Business Law Section Chair

**Noon – 12:30 pm**

**Bloody Mary and Mimosa Reception**

**Honoring Phillip W. McCallum, Alabama State Bar's new Executive Director and wife, Kelley**



The McCallum's

*Patio*

*Sponsored by the Alabama State Bar*

**12:30 pm – 1:30 pm**



**"Love Your Neighbor" Buffet Luncheon**

(\$40/person)

*Grand Ballroom North*

Speaker: R. Ashby Pate, "Be the Light," Lightfoot Franklin & White, LLC, Birmingham

Presiding: J. Cole Portis, Beasley Allen Crow Methvin Portis & Miles, PC, Montgomery, 141st President, Alabama State Bar



Pate

This luncheon is a new feature of our annual meeting, and a signature event you do not want to miss. You will leave hopeful, encouraged and inspired.

*Sponsored by the Alabama State Bar*

**12:30 pm – 3:30 pm**

**Solo & Small Firm Section Business Meeting and Social**

*Bucky's Lounge*

**1:30 pm – 2:00 pm**

**Break – Visit Legal Expo 2017**

*Grand Ballroom South*

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**2:00 pm – 3:00 pm**

## *Breakout Sessions*



**Labor and Employment Law Update:  
Recent Developments and Their Impact  
on Employment in Alabama**

**(1.0 hour MCLE credit)**

*Azalea Ballrooms A-B*

Presenters: Abby Morrow Richardson, Partner, Richardson Law Firm, LLC, Mobile; Kathryn Morris Willis, Partner, Burr & Forman LLP, Mobile

*Sponsored by the Labor & Employment Law Section of the Alabama State Bar*



**KEYNOTE PRESENTATION: Legal  
Industry Trends: In-House/Outside  
Counsel Roundtable**

**(1.0 hour MCLE credit)**

*Azalea Ballrooms C-F*

Moderator: Beau Grenier, Chairman of the Board and Managing Partner, Bradley Arant Boult Cummings LLP, Birmingham

Panel: David M. Benck, Vice President & General Counsel of Hibbett Sports, Inc., Birmingham; M. Stanford Blanton, Managing Partner and Executive Committee Chair, Balch & Bingham LLP, Birmingham; Gregory S. Curran, Chairman, Maynard Cooper & Gale, PC, Birmingham; J. Patrick Darby, Executive Vice President, General Counsel and Corporate Secretary of HealthSouth Corporation, Birmingham

The legal industry continues to change dramatically and rapidly due to globalization, consolidation, technological advances, alternative service providers, and changing client preferences and models. A panel of large law firm managing partners and in-house general counsel will discuss these trends and the evolving relationship between inside and outside counsel.

*Sponsored by the Future of the Profession Task Force of the Alabama State Bar*



**Current Issues in Criminal Defense Law  
(1.0 hour MCLE credit)**

*Beachside Room*

Presenter: Michael P. Hanle, Jaffe Hanle Whisonant & Knight, PC, Birmingham

*Sponsored by the Alabama Criminal Defense Lawyers Association*



**Primer on Qui Tam Actions against  
Federal Government Contractors**

**(1.0 hour MCLE credit)**

*Magnolia Ballroom 2*

Presenters: Jerome S. Gabig, Wilmer & Lee, PA, Huntsville; Richard J.R. Raleigh, Jr., Wilmer & Lee, PA, Huntsville

In fiscal year 2016 the federal government recovered \$4.7 billion under the False Claims Act. If your client does business with the federal government, your client needs to be forewarned and forearmed about the False Claims Act.

*Sponsored by the Government Contracts Section of the Alabama State Bar*



**Developments in Campaign Law in  
Advance of 2018 Elections / Alabama  
Ethics Act: Recent Opinions and Rulings**

**(1.0 hour MCLE credit)**

*Magnolia Ballroom 4*

Moderator: Matthew C. McDonald, Jones Walker LLP, Mobile

Panel: Thomas B. Albritton, Alabama Ethics Commission, Montgomery; Cynthia P. Raulston, Alabama Ethics Commission, Birmingham, Matthew D. Fridy, Wallace Jordan Ratliff & Brandt, LLC, Member of House of Representatives, Judiciary Committee, Montgomery; Dennis R. Bailey, Rushton Stakely Johnston & Garrett, PA, Montgomery; Edward A. 'Ted' Hosp, Maynard Cooper & Gale, PC, Birmingham

*Sponsored by the Elections, Ethics & Government Relations Law Section of the Alabama State Bar*

**2:00 pm – 4:30 pm**

**Refreshments**

*Grand North Corridor*

*Sponsored by the Alabama State Bar*



**2:30 pm – 4:00 pm**

**Children's Poolside Ice Cream Social**

*Tom Sawyer's Playground at the Grand Pool*

(Recommended for all children ages 12 and under)  
Ice cream and drinks will be served.

*Sponsored by Insurance Specialists, Inc., Alabama*

**3:00 pm – 5:00 pm**

**Break – Visit Legal Expo 2017**

*Grand Ballroom South*

**3:15 pm – 4:15 pm**

**Pro Bono Celebration Task Force Meeting**

*Magnolia Ballroom 2*

**Non-Resident Members Section Business Meeting**

*Magnolia Ballroom 1*

Timothy P. Chinaris, Belmont University College of Law, Nashville, TN, Non-Resident Members Section Chair

## 3:15 pm – 4:45 pm



### **Implicit Bias: A Frank and Continuing Conversation from the Bench's, the Educator's and the Practitioner's Perspectives**

(1.5 hours MCLE credit)

*Azalea Ballrooms C-F*

Panel: Judge John H. England, 6th Judicial Circuit, Tuscaloosa County, Tuscaloosa; Judge P. Dale Segrest, The Segrest Law Firm, Tallassee; Elizabeth H. Huntley, Of Counsel, Lightfoot Franklin & White, LLC, Birmingham; Cassandra W. Adams, Professor and Assistant Dean, Samford University, Birmingham; Christina D. Crow, Jinks Crow & Dickson, PC, Union Springs  
*Sponsored by the Women's Section and Diversity Committee of the Alabama State Bar*

## 3:30 pm – 4:30 pm

### **Report of the Law Schools and Legal Education Task Force to Law School Deans**

*Magnolia Ballroom 3*

*Sponsored by the Law Schools and Legal Education Task Force of the Alabama State Bar*

## 3:45 pm – 4:00 pm

### **Procession to Daily Firing of Cannon**

A tradition at the Grand Hotel. Listen for the drums, and watch the parade around the Grand Hotel grounds, concluding with the firing of the cannon near the croquet lawn. A salute to today's military and those who have passed through this historic resort.

## 4:00 pm – 5:00 pm

### **Afternoon Tea at the Grand**

*Rotunda, Main Building*

Join friends for complimentary afternoon high tea and cookies. Service is fireside which is decorated with an eclectic mix of Oriental exotica and English traditional furnishings.

## 4:30 pm – 6:00 pm

### **Celebrate Diversity/Inclusion Gathering**

*Patio*

*Sponsored by the Diversity Committee of the Alabama State Bar*

## 5:00 pm – 6:00 pm

### **The Alabama Lawyer Editorial Board Meeting**

*Magnolia Ballroom 3*

## 5:00 pm – 6:30 pm

### **21st Annual Alabama State Bar Volunteer Lawyers Program Reception**

(No ticket required)

*Sky Lounge, Main Building, Third Floor*

*Sponsored by: McCallum, Methvin & Terrell, P.C.; Harris, Caddell & Shanks, P.C.; Copland, Franco, Screws & Gill, PA; Rosen Harwood, PA; White Arnold & Dowd P.C.; Gilpan Givhan, PC; Sasser, Sefton & Brown, P.C.; Beasley, Allen, Crow, Methvin, Portis &*

*Miles, PC;*

*Cumberland School of Law; Ball, Ball Matthews & Novak, PA; Baker Donelson, PC, Jinks Crow & Dickson, P.C.*

## 6:00 pm – 7:30 pm

### **Children's Party and Dinner with the Trolls**

*Grand Ballroom North*

Children ages 5-12 are invited to play games, have their face painted, make a Troll craft and enjoy a children's meal while their parents attend law school receptions.

*Sponsored by Insurance Specialists, Inc., Alabama*



### **Samford University Cumberland School of Law Alumni Reception**

*Azalea Ballrooms A-B*

*Sponsored by Samford University Cumberland School of Law*

### **The University of Alabama School of Law Alumni Reception**

(\$15/person)

*Magnolia Ballroom 4*

*Sponsored by The University of Alabama School of Law*

## 6:30 pm – 7:15 pm

### **Cocktail Reception**

(By invitation)

*Lagoon Room, Main Building, Second Floor*

*Sponsored by the American Bar Foundation*

## 7:15 pm – 9:00 pm

### **American Bar Foundation Dinner**

(By invitation)

*Lagoon Room, Main Building, Second Floor*

Speakers: Dr. Wayne Flynt, Professor Emeritus in the Department of History, Auburn University, Auburn; Wilson A. Schooley, Sullivan Hill Lewin Rez & Engel, San Diego, CA (Atticus Finch's *To Kill A Mockingbird* closing argument delivery)



Flynt

## 7:30 pm – 8:30 pm

### **Jones School of Law Dessert Reception for Alumni and Friends**

*Beachside Room*

*Sponsored by the generosity of Faulkner University Thomas Goode Jones School of Law*

## 7:45 pm

### **Ring of the Bell at Sunset**

A southern tradition that signals the end of the day and the beginning of the evening. Let the bell's toll remind you to enjoy a family evening at the Grand Hotel and create memories for a lifetime.



## FRIDAY, JULY 14, 2017

### 7:00 am – 8:00 am

**“Friends of Bill W.” Meeting**  
*Card Room, Main Building, Second Floor*

### 7:00 am – 11:00 am

**Bay Fishing**  
(\$160/person – includes 4-hour fishing plus refreshments)  
(Ages 12 and older) Pre-registration required – all equipment and artificial bait furnished  
*Meet at the Marina at 6:45 am*

### 7:30 am – 8:00 am

**Legal Specialization Coffee**  
(No charge)

*Magnolia Ballroom 2*  
Speaker: Angela Parks, Director of Regulatory Programs, Alabama State Bar, Montgomery  
If you want to learn what legal specialization certifications are available to you as a member of the Alabama State Bar, come and listen to this brief presentation. Learn how you can become certified and advertise your specialty.  
*Sponsored by the Alabama State Bar*



### 7:30 am – 8:30 am

**Early Morning Breakfasts**

**Past Presidents’ Breakfast**  
(Open only to State Bar Presidents)  
*Magnolia Ballroom 1*

**The University of Alabama Order of the Coif Breakfast**  
(No charge)  
(By invitation)  
*Magnolia Ballroom 3*

**Leadership Forum Alumni Breakfast and Meeting**  
(\$30/person)  
(Open to all Alabama State Bar Leadership Forum Graduates)  
*Beachside Room*

Speaker: Paul J. DeMarco, Parsons Lee & Juliano, PC, Birmingham  
*Sponsored by the Leadership Forum Alumni Section of the Alabama State Bar*

### 7:30 am – 9:00 am

**Continental Breakfast and Coffee Bar**  
*Patio*  
*Sponsored by Regions Financial Corporation*

### 7:30 am – Noon

**Registration**  
*Grand Ballroom Foyer*

### 8:00 am – Noon

**Legal Expo 2017**  
*Grand Ballroom South*  
Meet representatives from suppliers who tailor their products and services to the legal community. Be sure to have your drawing card signed by the exhibitors so you can enter to win prizes!

*NOTE: The Legal Expo is intended for registered lawyer attendees and their office administrative staff. We regret that children unaccompanied by a parent cannot be admitted to the Legal Expo.*

### 8:30 am – 9:30 am



**PLENARY SESSION: The Future of Education in Alabama and Its Effect on the Legal Profession**

**(1.0 hour MCLE credit)**  
*Grand Ballroom North*  
Speaker: Dr. Jack Hawkins, Jr., Chancellor, Troy University, Montgomery  
*Sponsored by the Alabama State Bar*



Hawkins

### 9:00 am – Noon

**Kiln Studio and Gallery (pottery)**  
**Throw me some clay!**  
(Ages 17 and older) (\$60/person)  
(Minimum of 6, Maximum of 24)  
Have you ever thrown clay on a wheel? In this activity, you will make your own pottery vessel from start to finish in the Kiln Studio and Gallery, 60 N. Section Street, downtown Fairhope.

### 9:30 am – 9:45 am

**Break – Visit Legal Expo 2017**  
*Grand Ballroom South*



9:45 am – 10:45 am

## Breakout Sessions



### Best Ways to Handle Social Media in Your Law Practice

(1.0 hour MCLE credit)

*Magnolia Ballroom 1*

Speaker: Keith Lee, Associate's Mind, Birmingham  
Publication after publication states that "social media continues to take the world by storm as millions of people communicate and network on Facebook, Twitter, Instagram, LinkedIn, YouTube and individual blogs every day. Its reach now extends to the practice of law, and has led to an explosion of state and federal court opinions involving some aspect of social media. Lawyers cannot afford to ignore the impact social media has on their practices. Older lawyers who prefer not to engage stand to lose clients through online marketing and face sanctions or even malpractice claims by failing to keep up. Younger lawyers well-versed in the ways of online communication may be so cocky that they run afoul of ethical issues that can likewise lead to sanctions." [Oklahoma Bar Journal archives] Our speaker today is on the cutting edge of the legal issues created by the technology revolution.  
*Sponsored by the Alabama State Bar*



### Beyond APTI – A Comprehensive Approach to Public Safety and Criminal Justice Reform in Alabama

(1.0 hour MCLE credit)

*Azalea Ballrooms A-B*

**Criminal justice/sentencing issues as the unjustness of civil asset forfeiture, collateral consequences in Alabama as loss of voting rights and difficulty in obtaining a job**

Moderator: Frank Knaack, Alabama Appleseed, Executive Director, Montgomery  
Panel: Joyce Vance, former U.S. Attorney, Northern District of Alabama, Birmingham; Ebony Howard, Associate Legal Director, Southern Poverty Law Center, Montgomery; Jordan Richardson, Senior Policy Analyst, Charles Koch Institute, Arlington, VA; Courtney Michaluk, Policy Analyst, Manuel H. Johnson Center for Political Economy at Troy University, Troy  
*Sponsored by the Alabama Appleseed Center for Law & Justice, Inc.*



### Alabama Law Institute 2017 Legislative Update

(1.0 hour MCLE credit)

*Azalea Ballrooms C-F*

Moderator: Othni J. Lathram, Director, Alabama Law Institute, Montgomery

Presenters:

R. Cameron "Cam" Ward, chairman, Alabama Senate Judiciary Committee, Senate District 14, Alabaster; Michael L. Jones, Jr., chairman, Alabama House of Representatives Judiciary Committee, House District 92, Andalusia

*Sponsored by the Alabama Law Institute*



### The Business of Being a Lawyer – Economics, EQ and Finance: What Every Lawyer Should Know

(1.0 hour MCLE credit)

*Magnolia Ballroom 4*

Speaker: Pamela Bucy Pierson, Research Professor of Law, The University of Alabama School of Law, Tuscaloosa

*Sponsored by the Business Law Section of the Alabama State Bar*



### Family Law Update and Business Meeting

(1.0 hour MCLE credit)

*Beachside Room*

Speakers: T. Shane Smith, Vella King & Smith, Birmingham; Joan-Marie Sullivan, Law Offices of Joan-Marie Sullivan, Huntsville

*Sponsored by the Family Law Section of the Alabama State Bar*

### 10:00 am – Noon

#### Chef-Lead Pizza Party

(\$35.00 per person)  
(Children ages 6-12)  
(Parent/Guardian must bring child)  
(Class size maximum of 30 children)

*Patio*

Learn to pull and toss pizza dough with the Grand Chef and build your own unique pizza from a variety of toppings and sauces.



### 10:00 am – 2:00 pm

#### Refreshments

*Grand North Corridor*

*Sponsored by the Alabama State Bar*

### 10:45 am – 11:15 am

#### Break – Visit Legal Expo 2017

*Grand Ballroom South*



**11:15 am – 12:15 pm**

## *Breakout Sessions*



**KEYNOTE PRESENTATION: Future of the Profession: How the Delivery of Legal Services Affects Main Street's Bottom Line**

**(1.0 hour MCLE credit)**

*Azalea Ballrooms C-F*

Speaker: Judy Perry Martinez, Former Chair of the ABA Commission on the Future of Legal Services, Of Counsel, Simon, Peragine, Smith & Redfearn, LLP, New Orleans, LA



Martinez

The legal profession is in the midst of rapid change. The influences of not only technology but innovative thinking are bringing forth new delivery models, new regulations, and new players. Individual lawyers, law firms, in-house law departments, and bar associations must lead in ensuring that the best of what the legal profession has to offer in terms of quality, efficiency, and ethics is at the foundation of innovations. Join us as Judy Perry Martinez, former chair of the ABA Commission on the Future of Legal Services, and current special advisor to the newly created ABA Center for Innovation, shares her view on what the future holds and how you can provide greater access to legal services and grow your bottom line.

*Sponsored by the Future of the Profession Task Force and the Leadership Forum Alumni Section of the Alabama State Bar*



**Getting & Keeping the Business: A Discussion with In-House Counsel**

**(1.0 hour MCLE credit)**

*Magnolia Ballroom 4*

Moderator: Andrew B. Freeman, Partner in Charge, Adams and Reese LLP, Mobile

Panelists: Mary Scott Hunter, Corporate Advisor for Compliance, Ethics and Risk, Intuitive Research and Technology Corporation, Huntsville; Norman Jetmundsen, Jr., Vice President and Associate General Counsel, Vulcan Materials Company, Birmingham; Jennifer L. Roselius, North Region Counsel, D.R. Horton, Inc., Daphne; Tony Zana, Vice President, Secretary and General Counsel, Intergraph Corporation; Deputy General Counsel, Hexagon AB, Madison

*Sponsored by the Business Law Section of the Alabama State Bar*



**Hurdles Low and High: Standards of Review on Appeal**

**(1.0 hour MCLE credit)**

*Azalea Ballrooms A-B*

Moderator: Aaron G. McLeod, Adams and Reese, LLP, Birmingham

Panel: Tommy E. Bryan, Justice, Supreme Court of Alabama, Montgomery; Marc J. Ayers, Partner, Bradley Arant Boult Cummings LLP, Birmingham

*Sponsored by the Appellate Practice Section of the Alabama State Bar*



**Introduction to Lawyer University: Overview of Courses Available – Marketing, Technology, Business Planning and Trends in Substantive Law**

**(1.0 hour MCLE credit)**

*Magnolia Ballroom 2*

Lawyer University was created to provide Alabama State Bar members with an easy and inexpensive way to obtain the skills they need to thrive in the changing legal climate of the twenty-first century. Lawyers must now juggle business planning, client development and marketing, and law firm technology, while trying to find time to practice law. In addition, they have to cope with a shifting legal landscape that sees some practice areas disappearing while alternative legal services providers, such as Legal Zoom, move in to provide consumer services that were once “bread and butter” work for law firms. Come learn what Lawyer University can do for you.

*Sponsored by the Lawyer University Task Force and the Practice Management Assistance Program of the Alabama State Bar*



**Current Topics in Bankruptcy: Dischargeability of Taxes and Student Loans and the State of Structured Dismissal**

**(1.0 hour MCLE credit)**

*Beachside Room*

Presenters: J. Leland Murphree, Maynard Cooper & Gale, PC, Birmingham; Jamie Alisa Wilson, Assistant United States Attorney for the Southern District of Alabama, Mobile; Charles M. Ingram, Jr., Ingram, Rice & Parr, Opelika

The panel will discuss recent developments in bankruptcy treatment of student loans and taxes in consumer bankruptcies and the impact of the U.S. Supreme Court's decision in *Jevic* on structured dismissal.

*Sponsored by the Bankruptcy & Commercial Law Section of the Alabama State Bar*



## 12:30 pm – 1:00 pm

### Women in the Law Reception

*Sky Lounge, Main Building, Third Floor  
Sponsored by the Women's Section of  
the Alabama State Bar*

## 1:00 pm – 2:00 pm

### 15th Annual Maud McLure Kelly Award Luncheon

(\$40/person)

*Lagoon Room, Main Building,  
Second Floor*

The Maud McLure Kelly Award recipient is Martha Jane Patton, Executive Director, Legal Aid Society of Birmingham, Birmingham.

This year the Susan B. Livingston Leadership Award will be awarded to Maibeth J. Porter, Maynard Cooper & Gale, PC, Birmingham.

*Sponsored by the Women's Section of  
the Alabama State Bar*



Patton



Porter



### Preserving the Past, Promoting the Future: Leveraging Historic Tax Credits

(1.0 hour MCLE credit)

*Azalea Ballrooms A-B*

Moderator: J. Price Evans, IV, Mississippi Valley Title Services Company, Birmingham

Speakers: Stephen McNair, Ph.D., McNair Historic Preservation, Inc., Mobile; Charles E. "Chip" Tait, Counsel, Burr & Forman LLP, Mobile

*Sponsored by the Real Property, Probate & Trust  
Section of the Alabama State Bar*



### An Update of Substantive Workers' Compensation Case Law from 2016-present

(1.0 hour MCLE credit)

*Azalea Ballrooms C-F*

Moderator: Bernard Nomberg, The Nomberg Law Firm, PC, Birmingham

Speaker: Michael J. Cohan, Webster Henry Lyons Bradwell Cohan & Speagle, PC, Montgomery

*Sponsored by the Workers' Compensation Section of  
the Alabama State Bar*

## 1:00 pm – 5:30 pm

### Golf Tournament

(\$160/person – includes cart, boxed lunch and drink tickets)

*Shotgun Start Azalea Course*

Transportation is provided. Meet at the Valet Parking area at 12:30 pm for 12:45 pm shuttle.

Contact Chip McCallum at 205-335-9100 if you'd like to play golf.

*Sponsored by the Alabama State Bar*

## 2:00 pm – 3:30 pm

### Alabama Access to Justice Meeting

*Magnolia Ballroom 1*

## 2:15 pm – 3:15 pm



### Review of United States Supreme Court Cases – October 2016 Term

(1.0 hour MCLE credit)

*Azalea Ballrooms C-F*

Speakers: John C. Neiman Jr., Maynard Cooper & Gale, PC, Birmingham; Andrew Brasher, Alabama Solicitor General, Montgomery

*Sponsored by the Alabama State Bar*

## 2:30 pm – 3:00 pm

### Women's Section Business Meeting

*Boardroom 1, Main Building*

Allison O. Skinner, Cadence Bank, Birmingham,  
Women's Section Chair

## 2:30 pm – 4:30 pm

### Family Tennis Tournament

(No charge)

*Lakewood Club at The Colony, 18269 Colony Drive*

Transportation is provided. Meet at the Valet area at 2:00 pm for the 2:15 pm shuttle. The tournament will be a round robin; partners will be drawn and players will rotate partners after each match of four games.

*Sponsored by the Alabama State Bar*

## 3:30 pm – 5:00 pm

### Sailing on "The Joshua Schooner"

(\$45.00/person)

*Meet at the Marina at 3:15 pm*

## 3:45 pm – 4:00 pm

### Procession to Daily Firing of Cannon

A tradition at the Grand Hotel. Listen for the drums, and watch the parade around the Grand Hotel grounds, concluding with the firing of the cannon near the croquet lawn. A salute to today's military and those who have passed through this historic resort.

*(Friday continued on page 16)*



# FRIDAY, JULY 14, 2017

(Continued from page 15)

## 4:00 pm – 5:00 pm

### Afternoon Tea at the Grand Rotunda, Main Building

Join friends for complimentary afternoon high tea and cookies. Service is fireside which is decorated with an eclectic mix of Oriental exotica and English traditional furnishings.

## Silent Auction

## 6:00 pm – 8:30 pm

### Women's Section Silent Auction Fundraiser (No ticket required)

*Grand Ballroom South & Corridor*

Take this opportunity to bid on some fabulous items at incredible prices. Mingle with your friends while you shop.

*Sponsored by the Women's Section of the Alabama State Bar*

## 6:30 pm – 9:30 pm

### President's Closing-Night Family Dinner-Dance and Children's Party

*Grand Ballroom North*

Join us as we say thank you to J. Cole Portis for his superb leadership this past year as the 141st president of the Alabama State Bar. He has planned an outstanding evening of fun and fellowship with wonderful food, spirited beverages and music. *The Main Attraction Band* is without question one of the hottest corporate party bands in the country and is now entertaining crowds of 100 to 1,000 all over the Southeast. Casual dress recommended.

*Sponsored by Beasley Allen Crow Methvin Portis & Miles, PC and the Alabama State Bar*



Portis



## 7:45 pm

### Ring of the Bell at Sunset

A southern tradition that signals the end of the day and the beginning of the evening. Let the bell's toll remind you to enjoy a family evening at the Grand Hotel and create memories for a lifetime.

## 9:30 pm

### Barrels and Planks - Bourbon and Cigar Mixer Patio-Beachside

After the presidential party winds down, come out to the patio for a laid back and relaxing close to the day. Sample several cigars and bourbons - the new American



liquor - selected by Daniel Fuernrohr, the resort's beverage manager who recently received national recognition for his bourbon program at the Grand Hotel. Hear Daniel's brief presentation, and enjoy the music of Robert Thornhill. *Sponsored by the Leadership Forum Alumni and Young Lawyers Sections of the Alabama State Bar*





# SATURDAY, JULY 15, 2017



## 7:00 am – 8:00 am

### Freedom Legal Run-Around 5K Run and 1-Mile Fun Run/Walk

(No charge)

Main Entrance, Grand Hotel

Advanced registration is required. First-place male and female attorney winners in the 5K will receive a complimentary registration to the 2018 Annual Meeting in Sandestin, FL. T-shirts will be given to all participants who complete the course. Water provided. Sponsored by Freedom Reporting – Freedom Litigation Support

## 7:30 am – 8:45 am

### Christian Legal Society Breakfast (\$30/person)

Beachside Room

Moderator: Samuel N. Crosby, Stone Crosby, P.C., past president, Alabama State Bar, Daphne

Introductions: Alyce M. Spruell, Rosen Harwood PA, Tuscaloosa, past president, Alabama State Bar; William T. Coplin, Jr., W.T. Coplin, Jr. LLC, Demopolis

Speakers: James Allen Main, Associate Justice, Supreme Court of Alabama, Montgomery; Monet M. Gaines, Assistant Attorney General, State of Alabama, Montgomery  
Sponsored by Rosen Harwood PA, Stone Crosby, P.C. and William T. Coplin, Jr. LLC



Main



Gaines

## 8:00 am – 9:30 am

### Continental Breakfast

Grand Ballroom Foyer

Sponsored by the Litigation Section of the Alabama State Bar

## 8:30 am – 9:15 am

### Women's Section Silent Auction Wrap-Up

Magnolia Ballroom 3

## 9:15 am – 11:15 am



### Grand Convocation: State of the Judiciary

(2.0 hours MCLE credit)

Grand Ballroom North

Presiding: J. Cole Portis, Beasley Allen Crow Methvin Portis & Miles, PC, Montgomery, 141st President, Alabama State Bar

### KEYNOTE ADDRESS:

Steven T. Marshall, Attorney General of the State of Alabama, Montgomery



Marshall

### SPECIAL PRESENTATIONS:

Award of Merit Recipients

William D. "Bill" Scruggs, Jr. Award Recipient

J. Anthony "Tony" McLain Professionalism Award

President's Award Presented in Recognition of Exemplary Service to the Profession

Jeanne Marie Leslie Service Award

Local Bar Achievement Awards

Volunteer Lawyers Program Pro Bono Awards Recipients

Al Vreeland Award Recipient

Walter P Gewin Award

50-Year Member Certificates

Firm/Group Award Recipient

Law Student Award Recipient

Mediation Award Recipient

Retiring Commissioners' Recognition

\*Recognition of Alumni of Leadership Forum

\*Installation of Augusta Dowd as 142nd President of the Alabama State Bar

\*Grand Prize Getaway presented by ISI Alabama, Inc. - must be present to win.

## 11:15 am – 11:30 am

### Board of Bar Commissioners' Meeting

Azalea Salons D-F

## 11:30 am – 1:30 pm

### Presidential Reception Honoring Augusta S. Dowd, 142nd President of the Alabama State Bar

Magnolia Ballroom 4

Augusta S. Dowd, Shareholder, Vice President & Managing Lawyer with White Arnold & Dowd P.C., Birmingham



Dowd

The ability to adapt quickly and make sound decisions in actively-evolving situations is the cornerstone of the firm's reputation. The firm specializes in high-profile litigation, mediation, private disputes and internal investigations. Everyone is cordially invited to meet Augusta's family and wish her well as she assumes the presidency. Enjoy the vintage music of The WingNuts whose entertaining and family-friendly style brings fun and excitement to audiences across the Southeastern U.S.

Sponsored by White Arnold & Dowd P.C. and the Alabama State Bar



# Legal Expo 2017

# Door Prizes

- **Free Marketing Makeover for Your Law Firm/Practice** (Includes branding, logo design, website design, content development, and tailored marketing plans for your firm/practice and up to 3 individual attorneys.)  
\$5,000 value – *Compliments of Cartography Consulting, LLC*
- **1 Free Case Screening**  
\$1,500 value – *Compliments of Parker Consulting and Associates*
- **iPad Mini**  
\$300 value – *Compliments of Sundown Legal Marketing*
- **Set of Luggage**  
\$300 value – *Compliments of Freedom Reporting – Freedom Litigation Support*
- **2 “Club Seat” Tickets & Parking Pass to Tennessee Titans at Nissan Stadium in Nashville, TN (Carolina Panthers – Sat., Aug. 19 at 2pm OR Chicago Bears – Sun., Aug. 27 at 12pm)**  
\$300 value – *Compliments of Huntsville-Madison County Bar Association*
- **Gourmet Goodie Basket**  
\$150 value – *Compliments of Henderson & Associates Court Reporters, Inc.*
- **Guess How Many Minis**  
\$150 value – *Compliments of Henderson & Associates Court Reporters, Inc.*
- **Google Home**  
\$130 value – *Compliments of LocalLawyer.com, LLC*
- **2 Silk Neckties**  
\$100 value – *Compliments of Atlanta Custom Tailors*
- **2 Silk Ties**  
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- **Bare Naked Noodles Gift Basket**  
\$100 value – *Compliments of LocalLawyers.com*
- **Bottle of Wine**  
\$100 value – *Compliments of ThreatAdvice*
- **3 Bottles of RUSH Wine**  
\$50 value – *Compliments of Huntsville-Madison County Bar Association*
- **Amazon Echo Dot**  
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- **Echo Dot** (Uses the Alexa voice service to play music, provide information, read the news, control smart home devices and more using just your voice.)  
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- **Amazon Echo Dot**  
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# ALABAMA STATE BAR

415 Dexter Avenue  
Montgomery, AL 36104  
[www.alabar.org](http://www.alabar.org)

*See you next year!!*

We look forward to seeing you at Sandestin Hilton for  
the 141st Annual Meeting, July 27-30, 2018!