

**Group Legal Services Association  
Solo, Small Firm, and General Practice Section  
2014 Annual Conference  
May 1-3, 2014, Las Vegas, Nevada**

---

**How to Build Your Practice and Book of  
Business by Choosing the Right Legal  
Panels to Join**

---

**Friday, May 2**

**2:10 pm – 3:10 pm**

**Presenters: Noah Davis, InPacta PLLC  
John R. Wachsmann, Wachsmann & Associates PC**



## **Noah Davis**

Noah Davis received his B.A. in Political Science and Psychology from the University of Central Arkansas (UCA) where he attended on a football scholarship. After graduating from UCA in 1995, Noah went on to the University of Arkansas School of Law where he graduated with honors in 1998. Following law school and a brief stint as a judicial law clerk with the Arkansas Court of Appeals, Noah traveled to Australia where he worked towards a Master's degree in International Commercial Law from the University of Melbourne. Upon his return to Seattle, Noah sought to develop an international commercial law practice with an emphasis on Southeast Asia. From then until now, his general practice firm IN PACTA has developed a strong practice in such areas as business organizations, corporate advisory, insurance, real estate, intellectual property, litigation and securities, and has, at times, grown to as many as six lawyers. Recent cases include: a successful defense of allegations of international Trademark infringement (including an opposition to domestic registration) before the United States Trademark Trial and Appeals Board (involving U.S. and Chinese companies); the successful dismissal of a million dollar lawsuit filed against our clients (an accounting firm) for breach of contract and breach of intellectual property rights; and a successful appeal in the United States' Ninth Circuit on behalf of personal injury plaintiffs against Holland America Cruise Lines.



## **John R. Wachsmann**

John is the principal at Wachsmann & Associates, PC. (1990-present) He maintains a full caseload and manages staff of six, including 3 attorneys. The office does significant legal work as a provider attorney. He also worked at Hyatt Legal Services as a Staff Attorney and a Managing Attorney (1985-1990) Mr. Wachsmann's experience with API - he has been a member since 1996, he was a board member from 2000-2009 and was President from 2007-2008. He has spoken at several API Conferences and served on numerous committees such as program planning, membership and webinar.

# **How to Build Your Practice and Book of Business by Joining the Right Legal Plan**

Panelists: Noah Davis, IN Pacta PLLC, and  
John R. Wachsmann, Wachsmann & Associates, P.C.

This session will explore the different types of legal plans from those that are employer sponsored to those that offer discounted legal fees. Experienced panel attorneys will discuss practice considerations, caseloads, payment issues, and their experiences being involved with numerous legal plans. This session is for you if you are new to the group and prepaid legal industry and are interested in building your book of business, but don't where or how to start. Legal plans come in many shapes and sizes, from large plans to small, from participant prepaying to an employer paying on behalf of employees. There are also different qualifications for different plan panels, and different volumes of business, all of which will be tackled in this one-hour can't miss presentation.

## I. Types of Plans.

In a prepaid legal plan, moneys are paid in advance to defray the cost of legal services furnished in the future to persons enrolled in the plan.

The prepaid access plan is designed to provide easy access to a lawyer for legal advice and other non-complex preventive services at low cost. An access plan provides an enrolled member with specified basic legal services at no additional cost, plus other services at discounted legal fee rates. The basic service may include telephone advice, brief office consultations, a simple legal document, a letter written by the lawyer. If the plan member wants or needs services beyond the covered service, the client and the lawyer will agree on a fee for that service based on the plan's fee schedule or hourly rate. For these additional services the member-client pays the lawyer directly.

The comprehensive prepaid plan goes considerably beyond the access plan in the amount and type of legal services provided. Generally, all plan benefits are available to the plan member at no additional cost once the prepaid premium has been paid. Typical sponsor-employer chosen benefits include unlimited legal advice on appropriate subjects, negotiations with adverse parties, drafting legal documents such as contracts, wills and deeds, and representation in court.

### A. Elements of a Plan

### B. Costs to the Plan Member

## II. Obtaining New Clients

As solo or small firm attorneys we sometimes have to either re-discover how to market to attract new clients or else re-invent ourselves or our practice. That's where legal plans come in. They market for you!

## III. Why People (i.e. our potential clients) Choose Legal Plans.

To save money! Though, first, the person must overcome any perceived stigma or suspicions attached to the notion of a legal plan.

### A. Alternatives to Choosing a Plan

1. Full Rate
2. Pro Se
3. Bar Referral Services
4. Unbundling

## IV. Discussion of Specific Plans and How to Sign Up

- A. ARAG
- B. Hyatt Legal Plans
- C. Country Wide Legal Plans
- D. Union Privilege

## V. What You the Provider Need to Know and Do Once a Plan Member selects you.

- A. Detailing the Contact
- C. Interacts with the Administrator
- D. Representing the Client
- C. Issues/Problems

## VI. The Group Legal Services Association (GLSA)

- A. GLSA provides information
- B. GLSA monitors developments
- C. GLSA educates its members

- D. GLSA presents networking opportunities
- E. Our members
- F. All of the largest and most well known plans are run or serviced by current GLSA member provider attorneys.
- G. Advantages to Provider Practice