

GLSA Annual Conference

October 5-7, 2023

Join **Group Legal Services Association**
in Music City USA-
Nashville, Tennessee
GLSA ~ an organization whose
members are committed to
Access to Justice

Early Bird registration
rate available until
September 1, 2023

YOUR REGISTRATION FEE INCLUDES:

- Friday and Saturday Breakfasts
- Opening Welcome Cocktail Reception
- State of the Industry Session
- Thursday Awards Luncheon
- Friday Networking Event and Cocktail Reception
- Hospitality Suite Throughout Conference
- Twelve (12) CLE Education Sessions & Networking!
- Refreshment Breaks throughout the Conference

Attorneys!
Network with Legal Plans
while obtaining
CLEs!

Legal Plans!
Register for a space to exhibit
and recruit
new attorneys!

CONFERENCE SCHEDULE

Thursday, 10/5/23

| | |
|-----------------|--|
| 8:00am-5:00pm | Registration |
| 8:00am-5:00pm | Hospitality Suite Open |
| 8:45am-9:45am | CLE session-Ethical Issues |
| 9:45am-10:00am | Networking Break |
| 10:00am-11:00am | CLE session-Diversity in the Legal Profession |
| 11:00am-11:15am | Networking Break |
| 11:15am-12:15pm | CLE session-State Regulation of Legal Services Plans |
| 12:15pm-1:45pm | Group Luncheon with Awards and Candidate Speeches |
| 2:00pm-3:00pm | CLE session-Generative AI and the Challenges of Running Today's Small Law Firm |
| 3:00pm-5:00pm | Legal Plan Bootcamp! |
| 5:00pm-6:00pm | Cocktail Reception Sponsored by Legal Resources |
| 6:00pm- | Dinner on Your Own In Nashville |

Friday, 10/6/23

| | |
|----------------|---|
| 7:00am-5:00pm | Registration Open |
| 7:30am-8:30am | Deluxe Breakfast |
| 7:00am-8:00am | CLE session-Ground Breaking AI Cases in Legal Insurance in the European Union |
| 8:00am-8:30am | A Special Welcome from Across the Pond |
| 8:30am-9:00am | How Does the European Union Regulates AI? |
| 9:00am-10:00am | CLE session-AI & Human Collaboration-A Game Changer for Access to Justice |
| 10:00-10:15am | Break and GLSA Board of Directors Ballots Due at Registration Desk |
| 10:15-11:15am | The State of the Industry! |

NETWORKING

A CONFERENCE FILLED WITH NETWORKING OPPORTUNITIES FOR ATTORNEYS, LEGAL PLANS, TECH COMPANIES AND ALL THOSE COMMITTED TO ACCESS TO JUSTICE!



CONFERENCE SCHEDULE

(continued)

Friday, 10/6/23 (continued)

- 11:15am-11:30am Networking Break
- 11:30am-12:30pm CLE session-Bioethics-Why Should it Concern the Legal Plan Industry?
- 12:30pm Announcement of Elections
- 12:30pm-2:00pm Lunch On Your Own in Nashville
- 2:00pm-3:00pm CLE session-ERISA Update
- 3:00pm-3:15pm Networking Break
- 3:15pm-4:15pm CLE session-FCRA Changes and the Effect on Legal Service Plans
- 5:00pm-6:00pm Cocktail Reception
- 7:00pm-10:00pm **Optional Activity**
Grand Ole Opry Show

Saturday, 10/7/23

- 8:00am-12:00pm Registration Open
- 8:00am-9:00am Deluxe Breakfast
- 9:00am-10:00am CLE session-The Fountain of Youth
- 10:00am-10:15am Networking Break
- 10:15am-11:15am Roundtable-Unions, Trustees, Plans & Attorneys
- 11:15am-12:00pm New GLSA Board Meeting
- 12:00pm Conference Ends

Optional Activities

- 12:00pm-2:00pm Country Music Hall of Fame & Museum
- 1:30pm-3:30pm Grand Ole Opry Backstage Tour
- 1:00pm-3:00pm Brewery & Distillery Tour

ACCOMODATIONS

NASHVILLE MARRIOTT AT VANDERBILT UNIVERSITY



Nashville Marriott at Vanderbilt University is located adjacent to Vanderbilt's campus and just a short drive to downtown to get the best of both collegiate and honkytonk worlds!



A Travelers' Choice
Award-Winning Hotel!



Nashville Marriott at Vanderbilt University-
Nashville, Tennessee

[Click here](#) to book your stay!

Group Legal Services Association Don't Miss the Networking Opportunities at the Annual Conference!



For the First Time!

LEGAL PLAN OPERATIONS BOOTCAMP

Transform Your Business

An intensive, expert-led bootcamp designed to revolutionize the way you approach your legal plan business. The insights you'll gain here are so potent, so transformative, that we might not be able to offer this again.

Here's a sneak peek:

Building a Robust Network: Learn the strategies to create a formidable network of attorneys, ensuring you have the best minds on your side.

Becoming Indispensable: Discover the secrets to positioning your firm as an essential provider, making you the go-to choice for clients.

Operational Excellence: Dive deep into designing operations that streamline your service offerings, ensuring efficiency and client satisfaction.

Stay Compliant: Get updated on the latest in compliance requirements, ensuring your firm operates within the legal framework.

First Impressions Matter: Master the art of creating unforgettable first impressions, setting the tone for lasting client relationships.

**The bootcamp is more than just a learning
experience—it's a promise of transformation.**

**A promise that your business will never be the same
again.**

CLE EDUCATION SESSIONS

AI & Human Collaboration: A Game Changer for Access to Justice

A global thought leader, Professor Katz will speak to our membership about the future of legal services and how the partnership between humans and AI will change the game, how generative AI and data science will shift the legal paradigm, improving access to justice and legal protection. He will share his thoughts on the critical role of human participation in the digital transformation journey and the importance of adapting to change. *Presenter: Daniel Katz, Professor of Law at Illinois Tech & Director of The Law Lab*

A Special Welcome from Across the Pond—GLSA & LPI Collaborative

A special welcome livestreamed from Bucerius Law School in Hamburg, where the Legal Protection International Conference is in session! GLSA and LPI's strategic partnership is in full swing, as we offer our members a seat at the European table of insurance providers and attorneys. Learn how industry professionals are embracing rapid changes in the law due to AI. What can Americans learn and adopt?

Presenters:

Antje Fedderke, Legal Protection Int'l aisbl

Simon Warr, President of Legal Protection Int'l, Wayne Hassay, GLSA President

How Does the European Union Regulate AI

What is the legal framework for AI? What is the potential impact of the new laws on the legal protection industry and how is legislation being shaped?

Presenter: Yordanka Ivanova-EU Commission FCRA – The Overlooked Tool for Consumers

25% of Americans have an error on their credit report. Members of legal plans should be encouraged to check their credit report for accuracy frequently. Errors should be disputed. Sadly, credit reporting agencies and furnishers frequently refuse to respond to disputes properly. When they fail to fix errors, the FCRA provides a mechanism to get the errors fixed and get damages to the consumer. We will talk about the nuts and bolts of the FCRA and how it can be integrated into a legal plan or law practice.

Presenter: Stuart Price, Resolve Law Group

Ground Breaking AI Use Cases in Legal Insurance

GLSA's strategic alliance with Legal Protection International offers our members exposure to global thought leadership. Invigorating, informative and illustrative, this session will offer cutting-edge examples from industry experts.

Presenters:

Colin Carter – Legal Engineer at Coop Rechtsschutz (Switzerland)

Michael Rogocki – Data Scientist at ROLAND Rechtsschutz (Germany)

Peter Heise – Allianz (Germany): AI Along the Insurance Value Chain – Insights from a Market Leader

ERISA Update

Katherine Hesse is back! As a respected resource to union plans, Ms. Hesse will update our attendees with recent guidance from the Department of Labor, as well as offer best practices for plan sponsors, fiduciaries, record keepers, and plan participants.

Finally, we will turn our attention to the impact of recent rulings and carve out a plan for compliance.

Presenter: Katherine A. Hesse, Murphy, Hesse, Toomey & Lehane, LLP

Generative AI and the Challenges of Running Today's Small Law Firm

The rapid rise of generative AI has provided yet one more proof point that the world in which today's small law firm operates is anything but stable. Even as awareness of generative AI tools like ChatGPT grows, there remains a great deal of hesitancy around its potential application to legal work. This session will explore some of the ways generative AI may actually be able to improve the productivity of lawyers in small law firms by boosting output and minimizing administrative work.

Generative AI has the potential to help address each challenges reported by small law firms, but as this session will point out, lawyers and firm leaders need to know what to look for in an AI solution and how to effectively and confidently deploy it.

Presenter: Mark Haddad, Thomson Reuters

CLE EDUCATION SESSIONS

State of the Industry

GLSA's uniquely dynamic discussion between legal plans and network attorneys. What is new on the Access to Justice landscape? Attend and listen, as well as offer your perspective. Two For One-Education, as well as Networking!

Panelists: Legal Plans, Attorneys, Tech Firms and You! Moderator: Allen Rodriquez, One400

Regulation of Legal Services Plans – A View From a Former In-House Counsel & State Regulator

Hear from a former state insurance regulator and in-house counsel of a legal services plan.

Essential for in-house counsel and management; helpful for plan attorneys!

Learn about the different regulatory “overlays” that affect legal services plans, focusing on insurance regulation and rules of professional conduct. Mr. Allen will explain the purpose of each level and type of regulation and necessity of clear strategy legal plans must have – internal controls and contracts; and external licenses or filings.

With greater understanding of the underlying themes and methods of this regulation, you should be in a good position to assure compliance. The talk will be presented in terms of concrete statutes and rules with key provisions clearly highlighted and explored.

Presenter: Kenneth Allen, Consultant and Former In-house Counsel to a Legal Services Plan and Former State Insurance Regulator.

Diversity in the Legal Profession

Join an exciting discussion led by panelists who will address the current diversity landscape in the legal profession and how it has been shaped based on the events in the last fifty years. What has been learned from history in the United States and what does the future hold? A dynamic discussion!

Presenters:

Steven W. Zachary, Managing Attorney at Zachary Law Group and William Thrush, Shareholder and Managing Principal of Friedman, Framme & Thrush, P.A.

Bioethics: Why Should it Concern the Legal Plan Industry?

As outlined in a recent Hein Online newsletter, Kenneth De Ville noted that lawyers are increasingly asked to participate in discussions that intertwine legal, clinical and medical-ethical concerns. With the increased participation of lawyers in this types of discussions, what are the ramifications? Dr. Warren will address Group Legal Services Association conference attendees with a keen knowledge of our industry and how it is impacted.

Presenter: Dr. Rueben C. Warren, Professor and Director of Bioethics at Tuskegee University, National Center for Bioethics in Research and Health Care

Roundtable-Unions, Trustees, Plans, & Attorneys

GLSA-The Industry's Home for **ALL** Legal Plans wants to hear from **YOU!**

Attend this peer-to-peer discussion which will provide for small group dialogue to gather unique insight, offer your POV and energetically answer all your questions!

This collegial exchange of information is unparalleled and a “do not miss!” for legal plans, trustees, unions and attorneys. *Please submit topics to: awaggoner@glsaonline.org*

Ethical Issues for Lawyers When Doing Business with Non-Lawyer Third Party Payors & Marketers

Legal & Business Ethics Including but Not Limited To:

Competence, Scope of Representation, Diligence, Communications, Fees, Confidentiality of Information, Conflict of Interest with Current Clients, Duties to Former Clients, Imputation of Conflicts of Interest: General Rule, Declining or Terminating Representation, Advisor -Lawyer's Role As Communications Concerning a Lawyer's Services and Solicitation of Clients

Presenter: Matthew Wade Torres, Esq. Babun & Torres, P.A.

UNIQUE EXHIBITOR & SPONSORSHIP OPPORTUNITIES

CONFERENCE EXHIBITORS—Exhibit at the conference and take advantage of ALL the year-long, extended exposure! Your booth will be incorporated in our meeting space for unlimited, continuous access to conference attendees! Plus! Your “Seat at the Table” is reserved at the State of the Industry Panel! See the benefits and prices in GLSA’s Annual Sponsorship Brochure by Clicking Here: [Events](#)

CONFERENCE SPONSORS—Enjoy a special designation as a conference sponsor, as well as recognition at the conference and all year long, including a listing in all of the conference materials and the website! Choose from the following opportunities:

| | |
|---|--|
| LANYARDS | Capture attention with your company name/logo around each attendee’s neck! \$750 |
| BADGES | Your firm’s name/logo will adorn each member—sponsor the badges and the exposure will be great! \$1,000 |
| CLE SESSIONS | Your firm’s name will be featured on signage outside one of the twelve (12) CLE sessions planned at the conference! Plus, all CLE sponsors will also be featured on all conference materials! \$500 |
| OPENING NIGHT WELCOME RECEPTION or FRIDAY COCKTAIL RECEPTION | Welcome attendees by sponsoring a bar during the opening night welcome reception on Thursday evening <i>OR</i> Support Access to Justice by sponsoring the Friday night cocktail party! Company name/logo featured on table tents, cocktail napkins and all conference materials! \$2,500 Each |
| SIGNATURE COCKTAIL SPONSOR | New This Year! A special cocktail named <u>after your firm</u> and featured at the Annual Conference cocktail receptions! \$1000 |
| THURSDAY CONFERENCE AWARDS LUNCHEON | Your firm will be the WINNER when its name/logo are featured on each table at the prestigious Conference Awards Luncheon. Company name/logo on signage and all conference materials as well! \$1,500 |
| NETWORKING BREAKS | Attendees love to network between sessions! Spotlight your firm by sponsoring a coffee and/or snack breaks throughout the meeting. Company name/logo on signage and all conference materials! \$500 |
| FRIDAY DELUXE BREAKFAST | Start everyone’s day out right by sponsoring the deluxe breakfast on Friday! Your company name/logo will be featured on table tents on each table, as well as on signage and on all conference materials. \$1,000 |
| SATURDAY BELUXE BREAKFAST | Leave the attendees with a lasting impression by sponsoring Saturday morning’s breakfast before members hit the road! Company name/logo on table tents, signage and on all conference materials! \$1,000 |
| PROMOTIONAL INFO | We will place your firm’s promotional materials in our conference materials for maximum exposure to our membership. \$1,500 |
| TABLE PLACEMENT | For even more exposure, we will place your firm’s promotional materials on each table for the duration of the conference sessions! \$2,000 |
| OPTIONAL ACTIVITIES | Amazing opportunities to showcase your firm! Contact awaggoner@glsonline.org for details and pricing. |

REGISTRATION FORM

First Name: _____ Last Name: _____

Title: _____ Name on Badge: _____

Company /Firm _____

Address: _____ City: _____ ST: _____ ZIP: _____

Phone: _____ Email: _____

_____ Bill to Card type: _____ Name on Card _____

Card # _____ Exp date: _____ Code _____

Billing address: _____ City: _____ ST: _____ ZIP: _____

Phone: _____ Email: _____

Amount to be charged on card \$ _____ Signature: _____

Please list state (s) in which you seek CLEs:

- Your Registration Fee Includes:**
- Friday and Saturday Deluxe Breakfasts
 - Opening Welcome Cocktail Reception
 - State of the Industry Session
 - Thursday Awards Luncheon
 - Friday Networking Event and Cocktail Reception
 - Twelve (12) CLE Education Sessions & Networking!
 - Hospitality Suite Throughout Conference
 - Refreshment Breaks throughout the Conference

Cancellation Policy
Full refunds will be given if notification is submitted in writing prior to Aug 31, 2023. Cancellation notices received between Sept 1 and Sept 15, 2023 will receive a 50% refund.
Cancellation notices received on or after Sept. 16, 2023 will unfortunately not receive a refund.

Hotel
The conference will be held at the **Nashville Marriott at Vanderbilt University**. A limited number of rooms are blocked at a special conference rate of \$245 per night. [Click here](#) to reserve or call the hotel to book your stay at (615) 321-1300

Special Requests
Accessibility: _____

Dietary Requirements: _____

Payment
Visit www.glsaonline.org and click on "Annual Conference" to register online with your credit card.
OR complete the form above and mail with your check to: Group Legal Services Assoc-GLSA, PO Box 1693, Arlington Heights, IL 60006

Conference Fees

| | | | | | |
|---------------|----------------|-------|---|----------|-------|
| Members | (until 9/1/23) | _____ | @ | 695.00 = | _____ |
| | (after 9/1/23) | _____ | @ | 745.00 = | _____ |
| Social guests | | _____ | @ | 595.00 = | _____ |
| | Guest Name: | _____ | | | |
| | Guest Name: | _____ | | | |

Non-members: _____ @ 995.00 = _____

Optional Events:
Choice of Sponsorship- _____ @ _____
Grand Ole Opry Show-Fri _____ @ 125.00 = _____

Music Hall of Fame or Opry Backstage Tour -Saturday _____ @ 55.00 = _____

Brewery & Distillery Tour-Sat _____ @ 75.00 = _____

Processing Fee
(for credit card payments) _____ **25.00**

Total \$ _____