

NALSC[®] NEWS

PRIOR EVENT TESTIMONIALS

Thank you for another wonderful symposium. Truly great program and so much fun to connect in person.

Love this!! Trevon was very inspirational and the conference was AMAZING!!! Great to see and catch up with everyone!

Really well done conference. Pendry and SD was a great spot. Lots of great networking and breakout sessions. Learned a lot and had a great time!

This is the conference you need to be a part of if you want to get to know key players in the industry. While it's a competitive industry, you can always find someone in the crowd that's willing to share their knowledge and experience.

The conference was amazing. So well organized and so enjoyable. The location was just amazing, the hotel and staff were beyond helpful and friendly. The food was unreal. The sessions and presentations were very enjoyable and the networking was excellent.

NALSC opened my eyes to what the recruiting world is like, being that I started recruiting just 6 months prior! With such a niche field, it was fun to interact with people who deal with the same day to day issues/successes and can relate. I gained a lot of confidence about my knowledge base and it was encouraging to see what success looked like from people who have been in the industry longer!

My first conference and I confirmed it makes sense for me to attend, even though I am on the firm side. Tips on clarifying needs of firm for recruiters were a good reminder. Enjoyed meeting new colleagues.

Great to meet colleagues and law firm recruiters. Learned about what the partners like to see in the recruits. Saturday morning was highly useful, talking about the real issues we face as recruiters. Giving the recruiters a chance to bring up what was important to them.

In This Issue

Page

- President's Message 2
- Maximizing Your Conference Experience 4
- Top 5 Takeaways from the Symposium 5
- Where's the AI? 6
- NALSC Membership Growth 7
- Board Member Profile: Connie Rinaldi, Esq. 8
- B+I Committee Action 9
- Are You Certified? 10
- Neurodiversity in BigLaw 10
- Law Firm Advisory Committee Report 13
- U-LPQ Update – A Case in Point 14
- Counsel's Corner: When is a Law Firm Partner a "Partner"? 15
- Lateral Partners and Ethics Landmines 16



NALSC 2025 Annual Conference

February 27-March 1
Miami, FL

- Hotel AKA Brickell
- Akerman LLP (for 2/28 networking reception)



NALSC 2025 ANNUAL CONFERENCE: 2/27 - 3/1 at the Hotel aka Miami (waitlist only)

Happy New Year!

It is exciting to report that 2024 was NALSC's most successful year in its history on many fronts and we look forward to another blockbuster year in 2025.

The Fall Symposium in Washington, DC was another sell-out event, with meaty content that provided real, implementable advice and excellent networking opportunities with our colleagues in the NALSC Community. Our keynote speaker, three-time Paralympic wheelchair basketball gold medalist and Secret Service professional Trevon Jenifer wowed us with an inspirational talk and received a standing ovation, the only one in NALSC history, as far as I know. The response from Symposium attendees was positive:

- "Well done! The conference was terrific!"
- "Love this!! Trevon was very inspirational and the conference was AMAZING!!! Great to see and catch up with everyone!"

We especially want to thank Pillsbury Winthrop Shaw Pittman LLP for hosting our closing cocktail party in its DC offices. In the past, we held our Fall Symposium in the conference space of one of our generous law firm supporting members; however, due to our increased membership and strong demand for in-person event attendance, we have outgrown law firm conference spaces. We met this welcome challenge by adopting a new hybrid model for our two annual in-person events, the Annual Conference in the Spring and the Fall Symposium. We now hold program sessions at a hotel conference facility and our closing cocktail party/dinner events at the close-by offices of a law firm supporting member. This has been a successful solution, but means that we will be seeking law firm venues and support for our conference and symposium cocktail parties in the future. To that end, I welcome discussions with any of our law firm supporting members who would like to host us and showcase their office space!



L-R: Stephanie Ankus, Valerie Fontaine, Melissa Peters, Stuart TenHoor, Trevon Jenifer

In addition to the Conference and Symposium, NALSC continues to deliver on its mission of providing its members with education and information on trends and issues in the marketplace. To that end, over the past several months, the Strategic Planning Committee has planned and executed a robust series of online programs on topics such as Small Search Firm Collaboration; In-House Recruiting; The Latest on Labor and Employment for Legal Recruiters; War Stories: Laugh, Cry, & Celebrate; Placing Partners; Mental Health for Recruiters and Candidates; and Secrets to Success: Tac-

President's Message



by Melissa Peters, Esq.

ABOUT THE AUTHOR:
Melissa Peters is the President of NALSC. Melissa is also Founder of MP Legal Search, LLC

P: (917) 620-9387

E: mpeters@mplegalsearch.com

W: www.mplegalsearch.com

tics, Tools, & Tech Gadgets.

We also released several new episodes of our Recruiting Stories Podcast series introducing members of our Board and the headquarters team as well as special guests such as our acclaimed Symposium keynote speaker Trevon Jenifer, and our own Joe Ankus, who spoke further on the important issue of mental health for recruiters and candidates. Thank you, Jordan Abshire, and the Website/Social Media Committee for all your hard work in producing these programs.

I also want to give a shout out to the amazing job that our committees are doing. They all have been extremely active, meeting regularly, and implementing new programs and initiatives, some of which you can read about in this newsletter. We greatly appreciate the work done by the Advisory Committee, which is comprised of representatives of NALSC's law firm supporting members and provides support and expertise to the NALSC Board.

We look forward to seeing everyone at the Hotel AKA Brickell in Miami, FL on Thursday, February 27th (beginning at 3pm ET) to March 1st (ending at 11am ET). Highlights of what's in store include:

- In our opening Session, **Be a Player in Your Own Game, Not a Piece in Someone Else's**, Seth Makowsky, founder of [Poison Pawn](#), combines game theory with elite-level coaching to guide the most exceptional performers in the world to improved decision-making with extraordinary results.
- **Back to Basics: Candidate Outreach Strategies and Role Playing**
- **Building a Business Case for Partner Candidates**
- **Targeted Growth through Opening Offices, Group Acquisitions, and Lateral Hires**

- **Safely Navigating the Attorney Movement Minefield** - Back by popular demand, HWG LLP ethics partner Hilary Gerzhoy will identify potential hazards and reveal how to navigate around them ethically for the successful placement of associates, counsel, partners, and in-house lawyers.
- **Employment Issues in the AI and Virtual/Hybrid Environment** - How can we get into or stay out of trouble when using AI in the recruiting process? What licensure and tax issues impact a virtual or hybrid law practice? Does it matter where lawyers, their employers, and the clients are located? What other dangers lurk?
- **Associate Movement: Myths and Motivations** - The [NALP Foundation](#) shares key insights from its Stay Study report, detailing the key factors driving associates' moves so we can make more and better matches.
- **Career Paths for Recruiters** - Parlay your hard-won knowledge and skills for long-term career success and satisfaction. Hear from someone who has done it all: lawyer, law school career services, legal recruiter, law firm C-Suite recruiter, law firm recruiting and professional development professional, legal business consultant, coach.
- **Unpacking the Conflicts Checking Process** - What does the conflicts check entail? What derails a placement? What can be worked around? Ethics partner Hilary Gerzhoy at HWG LLP and Bilzin Sumberg's General Counsel Jeffrey Snyder will demystify the process for both partner and associate placement.
- **The Juggling Act: Keeping Your Candidates and Clients Happy During the Recruitment Process**
- **Keynote:** Experienced General Counsel, law firm lawyer, C-Suite executive, consultant, and author Sterling Miller condenses thirty years of experience into ten points in his popular blog, "Ten Things You Need to Know." He will present ten things search firm and law firm recruiters need to know about law practice to boost our success.
- **Privacy and Cybersecurity** – also back by popular demand, Diana Iketani Iorlano, Esq., will fill us in on our legal obligations in handling personal/proprietary/financial information provided by a firm or candidate during the recruiting process and how we can minimize our risk and exposure to a data breach.
- **Firm Growth Strategies: Group Acquisitions, Mergers, Multi-city Expansion—or Not?** This panel of law firm managing partners and industry strategists will discuss the macro-level impacts of contraction on the legal industry as a whole. Is there still a place for mid-sized full-service law firms? What are the varying perspectives on "to merge or not to merge" and which firms would be the ideal target? Why would some firms resist and what is their growth strategy?

"I also want to give a shout out to the amazing job that our committees are doing."

"In addition to the Conference and Symposium, NALSC continues to deliver on its mission of providing its members with education and information on trends and issues in the marketplace."

- And don't forget to attend the Saturday morning **Breakfast Town Hall** – One of the attendees at last year's Conference Town Hall said: "Saturday morning was highly useful, talking about the real issues we face as recruiters. Giving the recruiters a chance to bring up what was important to them."

In addition to all the great programming, there will be ample time for schmoozing with our colleagues during coffee and meal breaks, networking receptions, an afternoon champagne toast, and hospitality suite. We greatly appreciate our generous sponsor Akerman LLP for hosting our special networking reception/dinner Friday night at their beautiful Miami offices. We also thank all of our sponsors for making this fabulous event possible.

Note: Registration for the 2025 NALSC Annual Conference is now Waitlist Only! You still may register, however, and NALSC HQ will let you know if/when a spot becomes available. Contact info@nalsc.org for more details.

One of our initiatives is to increase our involvement and partnership with our sister organization, NALP (National Association of Law Placement <https://www.nalp.org/>). NALP is an association of over 3000 legal career professionals, including recruiting, career services, professional development, and DEI professionals from law firms and law schools across North America and beyond. Their Executive Director, Nikia Gray, spoke at NALSC's recent Fall Symposium on "Legal Hiring Market: Trends and Forecasts." She mentioned to me that NALSC members are welcome to participate with NALP by responding to RFPs for conference speakers, providing webinars, or proposing articles for their publications. Members of the NALSC Board will be attending the NALP Annual Education Conference this Spring, representing our organization, as we have done for more than a decade.

Unfortunately, among all this good news, I must pass along some sad news: This past year, we lost two long time and valued members of the NALSC community. Vera Johnson Wright <https://www.parrishfh.com/obituary/vera-wright> and Alan Miles <https://earthfuneral.com/obituary/alan-miles-11092024/> passed away in 2024. We fondly remember their enthusiastic involvement in our organization and will miss them.

Thanks to the NALSC Newsletter Committee chaired by Jennifer Gillman, assisted by former Newsletter editor Valerie Fontaine, along with the contributions of committee members Jordan Abshire, Kevin Bacon, and Natalie Thorsen for another excellent and informative issue. Past issues of the semi-annual NALSC Newsletter can be accessed through the NALSC website at <https://www.nalsc.org/newsletters/>.

I hope to see you at the Annual Conference in Miami on Feb. 27th.

Best regards to all, **Melissa Peters** - President of NALSC®

Maximizing Your Conference Experience: A Lawyer's Guide to Before, During and After the Event

by Stefanie M. Marrone on 6/20/24; Reprinted with permission from [The Social Media Butterfly](#)



ABOUT THE AUTHOR AND CONTACT INFORMATION:

[Stefanie M. Marrone](#)

Conferences are powerful opportunities for lawyers to expand their networks, gain valuable insights and elevate their careers. But simply attending these events isn't enough to tap into their full potential. To truly benefit, you need a strategic approach: careful planning before, active engagement during and thoughtful follow-up afterward. This guide will show you how to make the most of every conference, transforming each one into a catalyst for professional growth and success.

Before the Conference

- **Define Your Goals:** Before you even register for a conference, it's essential to define what you want to achieve. Are you looking to network with potential clients, learn about the latest legal trends or position yourself as a thought leader, or some sort of combination of all of these? Having clear goals will not only guide your activities and interactions but will also ensure you make meaningful connections and derive maximum value from the event.
- **Research the Conference:** Familiarize yourself with the conference agenda, speakers, and attendees. Identify the sessions that align with your interests and goals. Reach out to speakers or other attendees via LinkedIn or email to set up meetings in advance. This proactive approach ensures that you make valuable connections.
- **Prepare Your Materials:** Make sure your business cards (extra points if you have an electronic one!), professional headshots and LinkedIn profile are up-to-date. Prepare an "elevator pitch" that succinctly describes who you are, what you do and what you're looking to achieve at the conference. Consider bringing along any relevant case studies or materials that showcase your expertise.
- **Plan Your Schedule:** Conference days can be hectic, so having a well-thought-out schedule is key. Highlight the must-attend sessions and note any downtime for networking or meetings. Use conference apps or tools to keep track of your schedule and make the most of your time.

During the Conference

- **Engage Actively:** Attend sessions that align with

your goals and participate actively. Ask questions, engage in discussions and connect with speakers and other attendees. Active participation not only enhances your learning but also increases your visibility.

- **Network Strategically:** Networking is a crucial part of any conference. Approach it with a strategic mindset. Attend networking events, social gatherings and use breaks to introduce yourself to new people. Remember to follow up with connections promptly, while the memory of your interaction is still fresh.
- **Utilize Social Media:** Live-tweeting or posting about the conference on LinkedIn can boost your visibility. Share key insights, quotes from speakers and your thoughts on sessions. This not only positions you as engaged and knowledgeable but also helps you connect with others attending the conference.
- **Take Notes:** Whether you prefer digital notes or a traditional notebook, document key takeaways from sessions and discussions. These notes will be invaluable for post-conference follow-ups and applying what you've learned to your practice.

After the Conference

- **Follow Up:** Follow up with the people you met at the conference. Send personalized LinkedIn connection requests, emails or messages mentioning your conversation. This helps cement the relationship and keeps you top-of-mind for future opportunities.
- **Reflect and Implement:** Take time to reflect on what you learned and how it can be applied to your practice. Share your insights with your team and consider writing a blog post or internal memo summarizing key takeaways. Implement any new strategies or ideas you've gathered to improve your practice.
- **Share Your Experience:** Share your conference experience with your network. Write a LinkedIn post and/or article summarizing the highlights and insights you gained. This positions you as a thought leader and can spark conversations with others who attended or are interested in the conference topics.



- **Plan for the Next Conference:** Finally, use the momentum from this conference to plan for the next one. Review what worked well and what didn't and adjust your strategy accordingly. Continuous improvement will ensure that you maximize the value of every conference you attend.

Key Takeaways

- **Set Clear Goals:** Define what you want to achieve to guide your activities and maximize conference benefits.
- **Research and Prepare:** Familiarize yourself with the conference details, update your materials and plan your schedule.

The Fall Symposium was packed with useful takeaways, and some of the highlights include:

1. **Use of AI** – AI is primed to be front and center in the legal field in the coming years with 79% of lawyers believing that it will be transformative to their practice. It's time to start understanding how it can be a beneficial tool for you and maximizing its benefits. Whether you're tapping into Chat GPT (best for creative writing), Gemini (best for research), or Claude (best for reasoning/ethical matters), the most important thing to remember is everything AI gives you should be treated as a first draft; humans MUST verify. It's best to think of AI prior to editing as "mad libs gone wild" and if the input is garbage, that will be reflected in the output.

2. **Cultural IQ** – Emotional Intelligence (EQ) is different from Cultural Intelligence (CQ) and often is insufficient when addressing cross-cultural challenges in the workplace. EQ is focused on the ability to identify and manage your own emotions and the emotions of others. Cultural Intelligence (CQ) is the ability to relate to and communicate effectively with people from other cultures. Both EQ and CQ hinge on empathy. Neither is stagnant, and like any other skillset or muscle, they can be strengthened with focused practice.

3. **Portal Collaboration** – Online portal submissions are here to stay. There has been a huge influx of agency recruiters to the legal market, and portals are necessary to protect against double submissions and make internal law firm recruiters' lives more manageable. So, what is the best way to streamline the process of using them productively while maintaining our personal connections and relationships? If you're an agency recruiter, having and maintaining a personal relationship with your internal client contacts is the only way to set yourself apart; reaching out after submissions is the best place for agency recruiters to add value.

4. **Career Transitions** – The top qualities candidates and clients seek in their agency partners are trust and credibility, relationship building over time, knowledge about the other (no surprises), true partnership (feeling like you're in this together and what's best for you is best for them), help uncovering the unwritten rules (for candidates), and being a real matchmaker.

5. **NALP Lateral Market Trends** – There are fewer attorneys in the private sector, and the candidate pool is much smaller than it's been in years past. Consequently, the need for recruiters is at an all-time high, but the job also is increasingly difficult. Various factors are contributing to this reality, including but not limited to the declining size of law school classes, Gen Z grads more likely to work in public interest, a growing pay gap between large and mid-sized firms, and—last but not least—merger activity. The impact of recent Supreme Court decisions will have ripple effects on the makeup of future law school classes, potentially making diversity hiring efforts at law firms even more important.

- **Engage Actively:** Participate in sessions, network strategically, use social media and take notes to enhance your experience.
- **Follow Up and Reflect:** Maintain connections, implement new insights, share your experiences with others in person and online.

Conferences provide many opportunities for professional growth, networking and learning. By strategically planning before the event, actively engaging during the conference and following up diligently afterward, you can ensure that you gain the maximum benefit from your participation. Whether you aim to expand your network, stay informed about industry trends or establish yourself as a thought leader, a well-executed conference strategy can significantly enhance your career. Remember, the effort you invest in preparing and participating will pay off in the connections you make and the knowledge you gain.

Top 5 Takeaways from the NALSC 2024 Fall Symposium

by Barbara Thompson, Esq. and Victoria Mathias, Esq.



ABOUT THE
AUTHORS

Barbara Thompson, Esq. is Attorney
Recruiter at LHH Recruitment Solutions.

P: (703) 622-6694 E: Barbara.thompson@lhh.com

Victoria Mathias, Esq. is Market Director of Legal
and Compliance at LHH Recruitment Solutions.

P: (504) 258-2759 E: Victoria.mathias@lhh.com



We look forward to learning from the industry experts, both featured speakers and our NALSC Community colleagues in attendance, at the upcoming 2025 Annual Conference. See you there!

AI is supposed to transform how we work, yet most legal search consultants see little change in their daily operations. What explains this gap? Is the AI revolution overstated, or is it simply not here yet?

Hurdles to the Revolution

- **Interfaces:** Chat interfaces like ChatGPT and Claude are powerful, but cumbersome for tasks that are smaller or require many pieces of information. Instead of copy-pasting into these separate tools, it would be better to use AI where you already work. Some apps from Google, Microsoft, or Notion have integrated AI features, while others may allow you to build your own add-ons or plugins (for those technically inclined). Check whether your tool has an API or plans to add AI features in the future.
- **Prompting:** Users often abandon AI after poor results from suboptimal prompts, not realizing that better outcomes are possible with refined prompting. While this barrier is decreasing, success still requires skill in writing and iterating prompts. Some basic education on “prompt engineering” can go a long way (and it’s not just for engineers).
- **Workflows:** A common mistake is to stick with our existing workflows, using AI at most to accelerate one step of the process. Simply accelerating existing processes with AI typically yields minimal gains. Transformative improvements come rather from reimagining entire workflows to leverage an army of tireless assistants. Examine your daily routines and look for what you can do faster, do better, start doing, or delegate entirely.

“The integration of AI into legal recruitment isn't happening in a single dramatic shift, but through incremental changes that are easy to overlook day-to-day.”

- **Trust:** Language models' tendency to hallucinate (make things up) remains a concern, especially in the legal industry. Solutions include better prompting, human verification, and monitoring guardrails. While models are improving, maintaining accuracy requires careful oversight where you can build trust incrementally over time. That said, even humans are not 100% accurate, so ultimately it boils down to knowing your allowable risk for a given task.
- **Beyond Text:** So far, text has been the primary way people interact with these AI systems, but in the past few months, speech, visual, and other “multi-modal” ways of interacting have started to be unlocked. This enables an AI to go beyond text to speaking on the phone, automating actions in your browser or computer, and working with files and their content.
- **Human Connection:** While recruiting remains relationship-driven, it is easy to underestimate how much user preferences evolve with technology. Just as younger generations prefer texting to phone calls, AI interactions may become preferred for their consistency, knowledge base, and availability. We should continue questioning what really needs to be done by a human.
- **Habits:** Our inertia often prevents the adoption of more efficient methods. While current processes may feel “good enough,” mastering AI systems will become a competitive advantage. Investments in

Where’s the AI?

by Byron Hsu

the space will compound so it’s worth breaking out of our habits to see what is possible, and make informed decisions about what to adopt.

- **Competing Interests:** Legacy software providers need to support existing interfaces and processes. This hampers their ability to innovate and new AI features often feel “bolted-on.” In addition, disruptive technologies can create tension between stakeholders that may not benefit equally. For example, search agencies heavily invested in human workforces may under-invest in automation due to workforce transition challenges. Firms with an agile culture or willing to undertake a painful adjustment may end up ahead in the long run.
- **Agency:** Current AI systems mainly react to requests rather than taking initiative. They provide information, but don’t take action. This is changing with the emergence of AI “agents” that can act autonomously. As a search consultant, you can imagine an AI that will automatically update your CRM, handle emails, send follow-ups, submit applications, or ping you when an important task is overdue. This AI may feel less like a tool, and more like a colleague. We’ll see more from AI agents in 2025.

Looking Ahead

The integration of AI into legal recruitment isn't happening in a single dramatic shift, but through incremental changes that are easy to overlook day-to-day. Success in this transition requires both understanding the current hurdles and actively experimenting with solutions. Legal search consultants who invest time now in learning AI tools, reimagining their workflows, and building trust with these systems will be better positioned to lead in an industry that increasingly blends human expertise with AI capabilities. The question isn't whether AI will transform legal recruitment, but how quickly we'll adapt our practices to make the most of these emerging technologies.

[To learn more about how you can make the most of AI today, click [“Leveraging AI in Legal Recruiting: 10 Common Mistakes to Avoid”](#).]

For any questions or feedback on this content, contact the author at byron@forwardlateral.law.



ABOUT THE AUTHOR:

Byron is the founder of [Forward Lateral](#), an AI-first search agency that partners with law firms, attorneys, and other search firms to advance legal careers.

NALSC Membership Growth

by Mary Clare Garber

As our Executive Director, Stephanie Ankus says, “NALSC practically sells itself!” She regularly fields calls from search firms and law firms asking about membership and, almost invariably, the callers join our organization.

NALSC’s membership numbers continue on an upward trajectory, with a growth rate of 19% since this time last year. Total membership is at an all-time high of 330! Currently, NALSC has 260 search firm members, 69 supporting members (law firms), and 1 associate member (vendor).

This past year, NALSC gained 43 new search firm members and 9 new law firm supporting members. Each of our new members has been (and new members will continue to be) welcomed by name in NALSC’s LinkedIn posts, so check them out online.

Since the Summer 2024 NALSC Newsletter, we are happy to extend a big welcome to:

New Search Firm Members

- [The Agency Recruiting](#)
- [Counsel Recruit](#)
- [Esquire Talent Consultants LLC](#)
- [Interlink Talent Solutions](#)
- [JC Hudson Search LLC](#)
- [Legal Solutions Group of Direct Recruiters, Inc.](#)
- [Limitless Workforce Solutions, Inc.](#)
- [Lionpoint](#)
- [Michael Aaron Staffing LLC - Legal Division](#)
- [Mosser Legal Search](#)
- [People Consulting USA](#)
- [Principle Recruiting, LLC](#)
- [RuffnerRose LLC](#)
- [Satori Legal Search](#)
- [Top of the Line Legal Search](#)
- [VortexLegal](#)

To learn more about our new search firm members, follow the above links to their profiles in the [Searchable NALSC Membership Directory](#).

New Law Firm Members

- [Freshfields Bruckhaus Deringer LLP](#) - Supporting Member
- [Adams and Reese LLP](#) - Supporting Member
- [Akin](#) - Supporting Member
- [Fried Frank](#) - Sponsor as well as Supporting Member
- [Gould & Ratner LLP](#) - Supporting Member
- [McGuireWoods LLP](#) - Sponsor as well as Supporting Member
- [Robinson & Cole LLP](#) - Sponsor as well as Supporting Member
- [Winston & Strawn LLP](#) - Supporting Member

We also are pleased to welcome a new law firm Supporting Member and Sponsor at the **GOLD** level: [Falcon Rappaport & Berkman LLP](#).

Our sponsors include law firms, companies (or company divisions) that provide products and/or services that have historically been utilized by legal search firms, or companies (or company divisions) that provide new



ABOUT THE AUTHOR:

Mary Clare Garber is NALSC’s Vice President of Membership. Mary Clare is also Principal of Princeton Legal Search Group.

P: (201) 301-7820
E: mclarer@princetonlegal.com
W: www.princetonlegal.com

products and/or services that are targeted specifically for use by legal search firms. We appreciate all of our sponsors who support NALSC’s events and activities. A complete list can be found at <https://www.nalsc.org/nalsc-mentorship-profiles/>.

We look forward to meeting, exchanging ideas, collaborating, learning from, and building relationships with our new members and sponsors.

We hope to see long-standing and new members and our sponsors at the NALSC 2025 Annual Conference in Miami, FL on February 27th—March 1st.

New Board Member Connie Rinaldi, Founder and Director of Project Recruit, has been an entrepreneur since childhood. She grew up in Oceanside, New York, where she loved to ride her bike and read. But, most importantly, she learned how to be an entrepreneur by going to work with her dad who owned a chain of retail 1-hour photo stores (before digital photography). Connie also knew from childhood that she wanted to be a lawyer. When in the 6th grade, she was involved in a personal injury lawsuit and fell in love with the justice system. Her career has incorporated the two themes of entrepreneurship and law.

Connie attended NYU where she enjoyed having the city as her campus and majored in political science with a double minor in Spanish and Italian. While attending Saint John's University School of Law's evening program, Connie worked full time as a court agent for the Lefrak Organization representing landlords in small claims court and administrative and mediation hearings. She felt it was important to get practical legal experience while attending school. But that wasn't enough for Connie. Ever the entrepreneur, she also created, owned, and operated Miracle Mixers which offered bartender and wait staff services for private parties on Long Island. She closed Miracle Mixers to pursue her career in law full time.

After graduating from law school, Connie worked at a few firms practicing insurance defense and commercial litigation and real estate and, in 2008, she opened up her own law firm, Zuniga & Rinaldi LLP. Several years later, after realizing that her heart was not in the practice of law but that she loved business and really enjoyed connecting with clients and building relationships, Connie started ZR Per Diem, a for-the-day court and deposition service for lawyers.

Connie believes that legal recruiting is very close to per diem services and always wanted to add permanent lawyer placement to the services the company offered, but her former partner did not agree. So, when COVID hit and the business at ZR Per Diem plummeted due to the courts' closing, she took it as an opportunity to explore becoming a legal recruiter. Being the proactive entrepreneur that she is, Connie took a class at Cornell in Talent Acquisition and networked with other recruiters. From there, Project Recruit was born. While her firm recruits nationwide, Project Recruit's small team focuses mainly on the East Coast. They specialize in mid-sized firms of between 50-350 attorneys, offering partner and associate placement, with the occasional placement of non-attorney law firm professionals such as paralegals and managers.

Connie enjoys the high stakes nature of recruiting. She says that, for every 20 disappointments, there's the feeling of extreme satisfaction in a perfect placement, and that's what drives her. She believes that being an eternal optimist is a necessary component of legal recruitment. It's ok to feel disappointed but you must move on. Connie has learned to deal with the inevitable setbacks that are part of the business by looking at the hundreds of job orders that need to be filled, the endless opportunities that await. That always makes her feel better and motivates her to keep going.

*"The best advice Connie ever received about recruiting is:
YOU NEVER KNOW."*

The best advice Connie ever received about recruiting is: YOU NEVER KNOW. If you're not sure about a candidate, talk to the client, explore it, and see if it could work. Recently, she had a candidate who after two interviews was rejected because the firm was not sure it could hire a fully remote attorney even though the position had recently

Board Member Profile: Connie Rinaldi, Esq.

Founder and Director of Project Recruit



P: (917) 412-3378

E: connie@projectrecruitco.com

W: www.projectrecruitco.com

been advertised as such due to the talent shortage in that specialty. The candidate and Connie devised a creative solution for the candidate to be in the office a few times a month, which they presented to the client, and which ultimately resulted in an accepted offer. If she were to start her recruiting career today, Connie says she would take more classes on AI and technology. She also would focus more on messaging and content at the outset.

Fun fact: Connie played professional poker part time for two years while she started her businesses. In 2004, she won a trip to Paris, France, and an entry to a \$10K event. In that event, she was the last woman standing and came in 24th out of 205 entrants. She says she uses many of the skills she learned as a professional poker player to succeed in business today.

When not working or dreaming up new pathways to success, Connie enjoys watching *Rounders*, a 1998 American drama film about the underground world of high-stakes poker, and any romcom and criminal/crime solving shows. The book Connie found most influential is *The E Myth: Why Most Businesses Don't Work and What to Do About It* by Michael E. Gerber (about entrepreneurial success—no surprise), and she enjoys any Patrick Lencioni book about teamwork, management, and leadership.

But Connie isn't all work and no play. She and her partner Andrea just bought a home in Oyster Bay NY and they, along with their children, Lila (10) and Robin (5), are loving it.

B+I Committee Action

by Arthur J. Polott, Esq.

NALSC proudly works to enhance the image of the legal search profession through public relations and by providing education and information on trends and issues in the marketplace. In 2024, to add further value to our membership and the communities we serve, NALSC leadership moved to establish a committee to actively promote a welcoming environment. We envisioned welcoming recruiters from varied backgrounds and geographic locations to NALSC, enhancing the NALSC brand in the legal industry, engaging with issues around diversity, and expanding program offerings.

I was asked to Chair this new committee and it has been a highly rewarding experience! I am grateful to the outstanding volunteers who joined us in our work. Sincere thanks go out to Esther Alpert, Ethel Badawi, Natalie Thorsen Harris, Katie McMahon, Gary Miles, Patrick Moya, Melissa Peters, Kathy Richardson, Connie Rinaldi, Regina Robbins, Bahareh Samanian, Stuart TenHoor.

“We envisioned welcoming recruiters from varied backgrounds and geographic locations to NALSC, enhancing the NALSC brand in the legal industry, engaging with issues around diversity, and expanding program offerings.”

In 2024 our group met monthly and we built consensus around our organizing principles. We call our committee the *Belonging and Inclusion Committee* (B+I Committee) and developed the following which were adopted by NALSC’s Board:

Mission Statement: Actively promote belonging and inclusion within the NALSC community and the legal communities we serve.

Statement of Purpose: NALSC is committed to creating a vibrant community where the needs, perspectives, and contributions of all legal search consultants are valued and integrated into our association. Therefore, we aim to increase awareness and actively promote belonging and inclusion within the NALSC community and the legal communities we serve.

Value Statement - NALSC is committed to:

- Prioritizing, promoting, and building an inclusive community.
- Creating a community where the needs, perspectives, and contributions of all members are always welcomed and considered.
- Educating members about belonging and inclusion.
- Encouraging members to proactively present and hire candidates from traditionally underrepresented communities for their searches and/or within their organizations.



ABOUT THE AUTHOR:

Arthur Polott, Esq. is a NALSC Director Emeritus as well as the Chair of the Belonging + Inclusion Committee. Arthur is also the Owner/Recruiter of Gateway Legal Placements, LLC.

P: (202) 470-5220

E: arthur@gatewaylegal.com

W: www.gatewaylegal.com

The Committee currently is developing a series of conversations and presentations around the issue of pay equity. The first such conversation will be presented as a Roundtable discussion led by Kathy Richardson, a former Board Member, at the 2025 NALSC Annual Conference in Miami. In addition, future work of the B+I Committee will include building relationships with affinity organizations around the country, engaging with the Advisory Board to co-create/co-sponsor programs, and developing other educational series to promote belonging and inclusion.

I am excited by what this committee can contribute to NALSC. Specifically, I expect our efforts will, among other things, promote innovation and creativity, foster stronger member engagement, expand NALSC membership, improve the reputation of NALSC, foster more collaboration and mutual respect, yield better decision making, and promote more satisfaction and “stickiness” for our members.

The B+I Committee is open to all NALSC members, not just members of the Board. If you wish to be part of this important work, please contact us at info@NALSC.org.

Are You Certified?

by Valerie Fontaine, Esq.

If your search firm is eligible but lacks certification as a woman-, minority-, veteran-, or other diversity-owned or small business, you're missing out on valuable business opportunities!

Most governmental entities now mandate that their vendors and their vendors' suppliers not only are diverse, but also are certified as such. Hence, law firms and businesses direct a certain percentage of their purchasing dollars to certified diverse suppliers to position themselves to bid for state and federal business. By becoming a certified diversity supplier, your firm not only has a better chance of landing the client, but you also become doubly attractive as it helps your clients compete for governmental business, as well.

A diverse supplier is at least 51% owned (holding equity), operated, and controlled by a person or persons of a diverse or disadvantaged background (minority, woman, LGBT, disabled, veteran, small business, etc.). To become certified, your firm undergoes a review process through an appropriate agency to ensure your business actually is owned, controlled, and operated by qualified persons. For a small business certification, your firm also may need to provide information regarding economic status, revenues of the business, and personal net worth.

There are several certification agencies, so do an online search for one that's best for your firm. You can receive multiple types of certifications if your firm qualifies in more than one category, and be certified by several different organizations in the same category.

Once you receive certification, let the world know! Post a copy of your certificate(s) on your website. Mention your certification at every marketing opportunity, and remind your clients and potential clients that, in addition to offering superior service, your certification helps them meet their supplier diversity goals.

Be sure to let NALSC headquarters know, so you can be identified as such in our online searchable membership directory at <https://www.nalsc.org/members/>. The Certified Business Enterprise category was added at the request of our law firm supporting members who wished to find certified search firm members specifically to direct work their way.

With government entities and businesses increasingly demanding that their outside legal representation look more like America, and law firms looking to diversify their vendors (such as search firms), don't ignore any advantages via certification that your firm is qualified to pursue. The certification process may seem onerous, but it's worth it!

"By becoming a certified diversity supplier, your firm not only has a better chance of landing the client, but you also become doubly attractive as it helps your clients compete for governmental business, as well."

ABOUT THE AUTHOR:

Valerie Fontaine, Esq. is a past Officer and Board Member of NALSC. She is a consultant assisting NALSC Headquarters as well. Valerie is a Principal of SeltzerFontaine LLC.



P: (310) 842-6985

E: vfontaine@seltzerfontaine.com

W: www.seltzerfontaine.com

Neurodiversity in BigLaw:

A conversation with Executive and Neurodiversity coach Julie Remer about this year's findings from Chambers Associate research.

by Cait Evans, Global Talent Head of Research at Chambers and Partners

The mantra of finding strength in diversity holds true when we explore the working patterns of neurodiverse lawyers across the US. Each year on Chambers Associate, we survey associates in BigLaw to discover how satisfied they really are with life at their firms. Since we began surveying the US market, we've seen trends emerge in how lawyers with varying backgrounds and identities respond to the market's collective experiences. Alongside the broader DEI concerns, recognizing neurodiversity is increasingly important to young legal professionals. We've looked at how this group interacts with different practice areas, career aspirations and general satisfaction, and the results are fascinating.

Understanding neurodiversity

Neurodiversity refers to variations between people's brains and nervous systems. When we talk about neurodiversity, we are not talking about it in the sense that it is a disability, as it is in law. In fact, the actual term negates the idea that there is one 'normal' way to think and function. Instead, it shows us that there are many ways in which people process information, their surroundings and their actions.

Being neurodivergent means different things to different people – there is no one size fits all. Most of us are familiar with terms like ADHD, autism and dyslexia, but the actual list is far longer. One thing in common with anyone falling into this category though, is that living with a condition listed under the umbrella term can be challenging to say the least. It's regularly associated with negative stigmas, particularly as you enter the world of work.

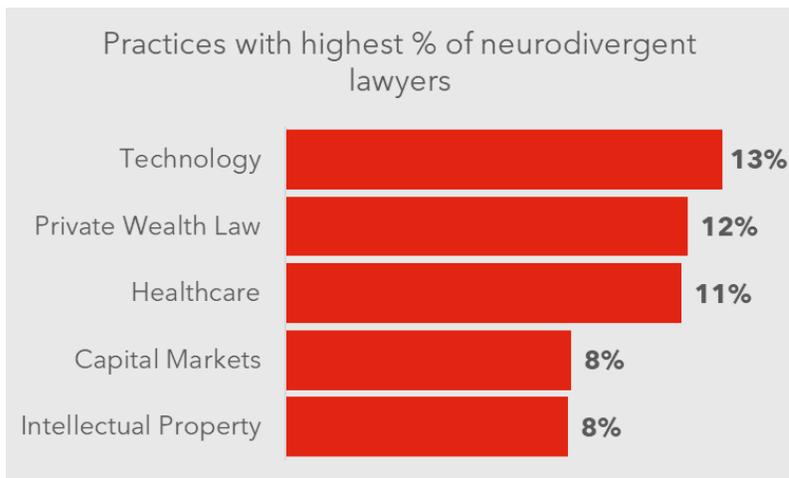
When I was diagnosed with ADHD at 20 years old, it was incredibly liberating. For the first time, I felt like I was able to understand myself, after years of feeling like something was just not right. But when I graduated from university, the one question I struggled to answer was *where exactly can I work with this condition?*

Continued on page 11

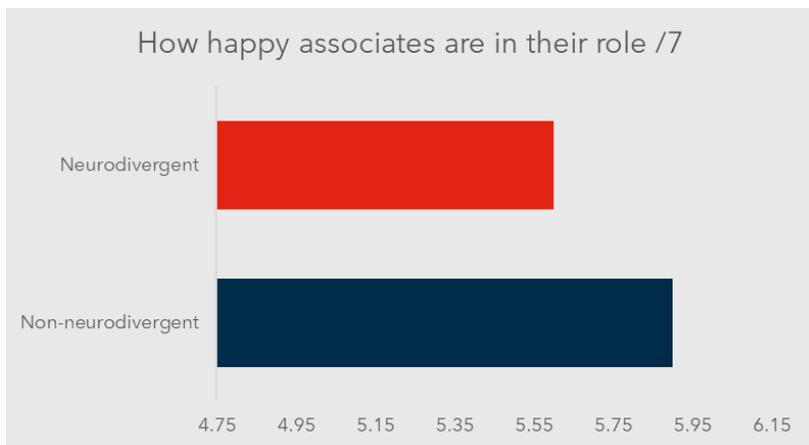
Many neurodiverse individuals approach career planning with this mindset. Everybody thinks about the basics, such as, what sort of work interests me? Where do I want to be based? What are the opportunities for growth? But living with neurodiversity requires you to think beyond that. You have to consider what sort of career will offer a specific environment that will cater for how you function. For example, will your ways of working be accepted there and will you be able to keep up with everyone else?

So, the concept of choosing a profession as tough and unforgiving as BigLaw might not initially jump out as an obvious match. After all, to someone with ADHD, long hours, high concentration and unpredictable demands do not conjure up images of their ideal working environment. But there are plenty of neurodivergent attorneys who thrive in BigLaw, as our research shows. Sitting down with Julie Remer from Amicus Coaching, we explore what drives happiness among neurodiverse attorneys, how they are able to harness their abilities at work for the better, what work needs to be done by firms to ensure that neurodiverse associates see the firm as a long-term career option, and what recruiters should be thinking about when working with a neurodiverse candidate.

Our findings



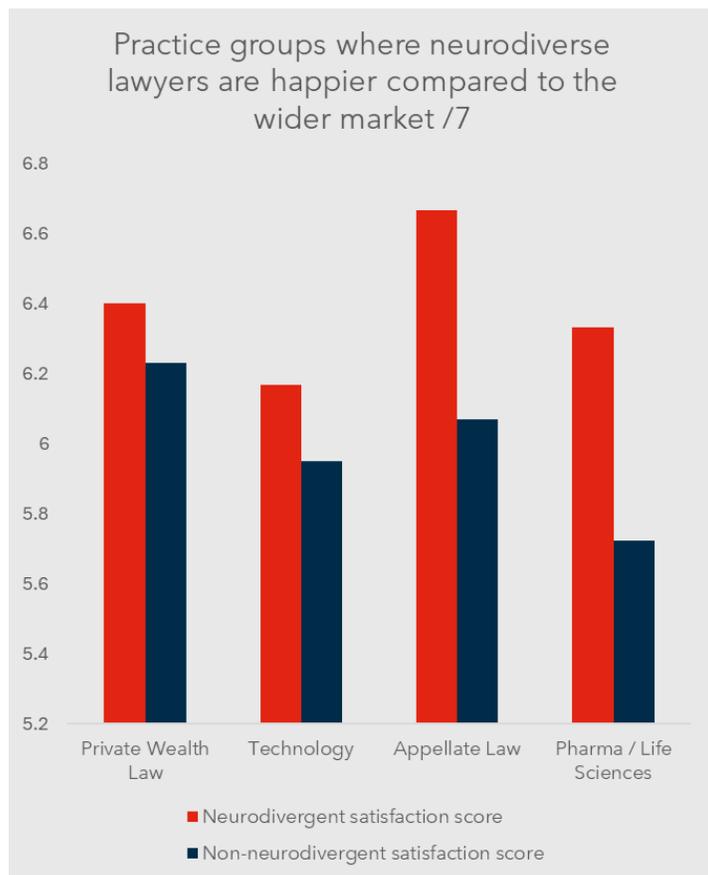
Of the 8,000+ associates we surveyed from August 2023 - January 2024, 9% reported being neurodiverse. Interestingly, we found that the practices which draw in the highest percentages of neurodivergent lawyers are more technical areas like technology, private wealth, healthcare, capital markets and IP. Remer, who coaches neurodiverse attorneys, tells us that *“this tracks with what I see in my coaching practice. I frequently work with neurodivergent attorneys in the tech fields, which suggests a natural gravitation toward areas where structured thinking and deep subject matter expertise are particularly valued.”*



Despite this, neurodiverse associates are, on average, less happy overall in BigLaw than neurotypicals. But as Remer points out, *“the small gap in happiness scores (5.6 vs. 5.9) highlights that when properly supported, neurodivergent lawyers can achieve similar levels of job satisfaction as their neurotypical peers.”* Remer adds that the gap in itself *“signals an opportunity to implement targeted well-being initiatives that address the specific challenges neurodivergent lawyers might face in legal practice.”*

“Once again, this signals that neurodiverse associates thrive in technical practices.”

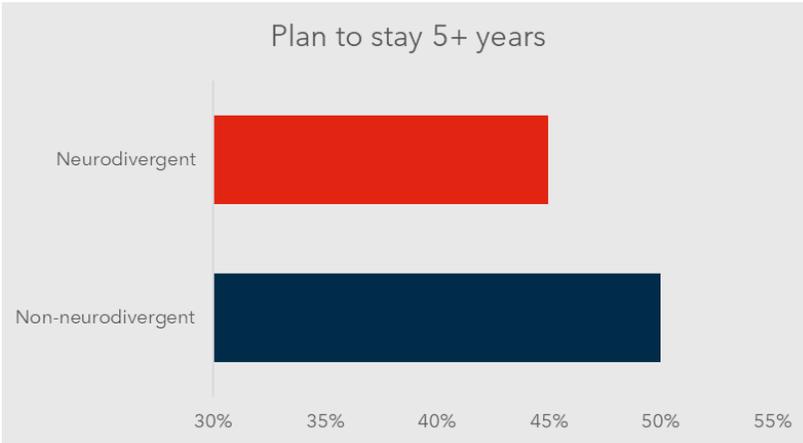
Focused training can also go a long way to ensure the happiness of a neurodiverse attorney. Remer explains, *“in my practice, I have found that when neurodivergent attorneys are able to take advantage of targeted coaching, they learn techniques and build skills which make them better, and happier, attorneys.”*



Though if we take a closer look at happiness levels among associates, there are some practices where neurodivergent attorneys actually buck the trend and are happier in their role than neurotypicals. These include appellate law, private wealth, technology and life sciences. Once again, this signals that neurodiverse associates thrive in technical practices.

Remer suggests that *“these environments may have already developed more inclusive practices and understanding of different working styles.”* For instance, appellate law is where we see the most significant difference, and the highest reported happiness score among neurodiverse attorneys: *“This could indicate that the structured nature of appellate work and the focus on detailed analysis plays to neurodivergent strengths.”* Though Remer does caution that, *“Appellate attorneys may struggle, however, with the longer timelines for drafting appellate briefs. Neurodivergent attorneys typically thrive with shorter deadlines*

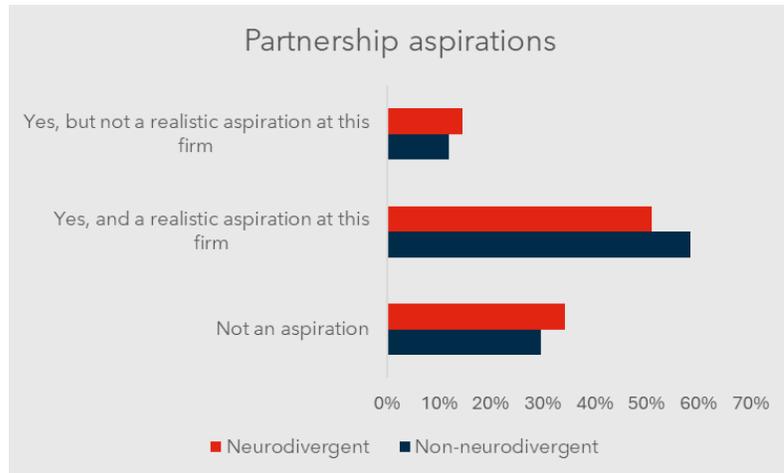
because the urgency of the project makes it more interesting and motivating.”



“I most frequently see attorneys who are neurodivergent leaving their firm... when they don’t have enough support.”

When it comes to long-term career planning, neurodiverse associates report being less likely than their neurotypical counterparts to envision staying at their firm for more than five years. In many cases, Remer highlights that “this retention gap represents a significant loss of talent and perspective that firms could address through improved accommodation practices and targeted career development support” within the firm.

“I most frequently see attorneys who are neurodivergent leaving their firm, the law firm environment, or the practice of law entirely, when they don’t have enough support and understanding from their supervisors and colleagues,” shares Remer, speaking from her own experience as a neurodiversity coach. “In a neurodiverse-affirming environment, many attorneys can thrive,” she stresses.



Neurodivergent associates are also less likely to view partnership as an aspiration at their current firm and are also less likely to consider it a general aspiration at any firm. “This difference suggests a need for more visible neurodivergent role models in partnership positions and clearer, more structured pathways to leadership for neurodivergent lawyers,” notes Remer.

Indeed, the profession has a long way to go on that front. Only 9% of associates taking our survey reported being neurodivergent, 10% preferred not to say. Neurodiversity is still very much a taboo subject in many workplaces. “Most neurodivergent lawyers I work with are reluctant to share their neurodivergence with their colleagues,” admits Remer. She adds that “this isolation makes it more difficult for neurodivergent attorneys to find role models and/or mentors. Without any evidence to the contrary, these attorneys will often feel like partnership is just not possible for them.”

Advice for recruiters

It’s conditions such as these that may push a neurodiverse attorney to consider making a move. As a recruiter, there are a few crucial points to note if you’re working with a neurodiverse candidate. Firstly, if you learn that a candidate is neurodiverse, make sure you get to know and understand their particular condition. Showing you care about their background and what makes them tick will not only be instrumental in making a successful placement, but for building a strong rapport with them too. The more you understand how their condition impacts them, the better positioned you will be to make a successful placement. It will show the candidate and the client that you’re working in a considerate and strategic way. Secondly, we know that different types of people thrive in different environments. When working with a neurodiverse candidate, be sure to ask what they expect from their next firm to help accommodate them. At the same time, learn from the firm about what initiatives they have in place that can address these needs. Ultimately, transparency is key on both sides. The little things will matter - not every firm will be able to offer the right environment to allow a neurodiverse candidate to thrive.

“Being neurodivergent means different things to different people – there is no one size fits all.”

At the firm level, recruitment teams should ensure that their recruitment process is accessible to all candidates e.g. clear and precise job descriptions, flexible formats for interviews, and allowing for extra time throughout the process. It’s also crucial that those involved in the hiring process are trained and educated in neurodiverse conditions, to avoid any hiring biases.

Unlocking the full potential of a neurodiverse employee and getting long-term commitment from them is the goal. Neurodivergent associates bring unique perspectives to the legal profession, such as the ability to hyperfocus, embrace technical problems or offer deeper creativity. Firms will only get there if they make their workplaces a positive and accommodating environment for their neurodiverse employees, where they can express themselves authentically without prejudice. We will continue to collect data on neurodiverse attorneys and will hopefully start to see a positive change over the years to come as the conversations around this topic continue.

ABOUT THE AUTHORS:

Julie Caron Remer
Executive & Neurodiversity Coach
Amicus Coaching, LLC
E: julie@amicuscoaching.com
W: www.amicuscoaching.com



Cait Evans
Global Talent Head of Research
Chambers and Partners
P: +44 (0) 207-778-1647
E: Cait.Evans@chambers.com
W: www.chambers.com

Law Firm Advisory Committee Report

The Advisory Committee, comprised of representatives of NALSC's law firm supporting members, provides expertise to the NALSC Board of Directors on how NALSC can best meet the needs of its law firm members, and how law firm members can best contribute to the overall success of NALSC. The Committee also assists with developing our Symposium and Annual Conference agenda programs in addition to providing suggestions for event locations, podcasts/article topics, potential speakers, and possible new initiatives. As a liaison between law firms and search firms, the Committee also provides strategic thinking on trends in the profession and suggestions to refine legal recruiting best practices.

The Committee currently is assisting with two of the initiatives, both of which involve NALSC's ongoing search for law firm supporting members to host events in various cities. The first involves locating law firm conference venues to host our networking cocktail parties in conjunction with the Annual Conference in the Spring and the Symposium in the Fall. NALSC's membership has been expanding at an unprecedented pace and, while it is exciting to be part of such a thriving and growing organization, we have outgrown the conference capacity such as that which has been so generously provided by our law firm supporting members for past events.

With that growth in mind, we have devised a hybrid solution, where the program sessions are held in a conference hotel and the gala networking receptions are hosted in the offices of a nearby law firm member. Hosting these events provides perfect opportunities for our law firm members to showcase their firms, show off their office space, and have their managing partners and internal recruiting teams speak to our membership highlighting the offerings and differentiating factors of each firm.

To participate in this initiative the hosting firm must have:

- Law firm space to hold 225-250 people, reception style – to host a cocktail reception for NALSC after our Symposia and/or National Conferences;
- Ability to provide cocktails and light appetizers for approximately 2 hours, typically occurring around 5pm-7pm; and
- Proximity to a good hotel within close walking distance to this law firm space so our members can easily go from our event at the hotel to the law firm's cocktail reception.

We are open to all geographic locations (subject to our Board's approval).

The second initiative is to locate law firm venues for hosting regional events such as was held in New York last May. Our first Regional Meetup was hosted at Kelley Drye's offices, featured a short presentation by one of their partners followed by a lively Q&A session, and was a well-attended success. The attendees, some of whom traveled from as far as Pennsylvania, Ohio, and even Colorado, loved the more intimate feel of the event, and enjoyed the opportunity to grab a drink and snacks, and mix and mingle with fellow NALSC members. We hope to have similar Regional Meetups around the country in the future. This is another opportunity to showcase your firm and its expertise. The pa-

rameters for participation in this initiative are the same as above (minus the need for a nearby conference hotel).

If your firm has an interest finding out more about hosting a reception for the NALSC Community and your space meets the parameters above, please contact HQ at info@nalsc.org and we will coordinate a call to discuss logistics.

The current members of the Advisory Committee are:

- Shannon Davis – Chief Legal Recruiting and Integration Officer at Mintz, Levin, Cohn, Ferris, Glovsky and Popeo, P.C. (Chair)
- Dyana Barninger – Senior Director of Legal Talent Acquisition at Faegre Drinker Biddle & Reath LLP
- Lindsay A. Callantine – Director of Attorney Affiliations at Vedder Price P.C.
- Laura DeRise – Director of Attorney Recruiting at Bass, Berry & Sims PLC
- Rhonda M. Fulginiti – Manager—Legal Recruiting at Buchanan Ingersoll & Rooney PC
- Jessica Grayson – Director of Practice Management & Lateral Growth at Stradley Ronon Stevens & Young, LLP
- Deverie Hart – Senior Manager, Lawyer Talent Acquisition, Davis Wright Tremaine LLP
- Yedida Hiller – Director, Lateral Associate Recruitment at Goodwin Procter LLP
- Carmen Kelley – Global Director of Lateral Attorney Recruiting at Morrison & Foerster LLP
- Benjamin Y. Lieber – Managing Partner at Potomac Law Group, PLLC
- Susan Schonfeld – Senior Director, Lateral Partner Recruiting and Integration at Wilson Sonsini Goodrich & Rosati LLP
- Adino Shimunova – Director of Lateral Partner Recruiting at Troutman Pepper Hamilton Sanders LLP
- Arlynn Villanueva – Manager, Lateral Partner Recruiting at Goodwin Procter LLP
- Donna Yergeau – Director of Legal Recruiting at Nutter, McClennen & Fish, LLP

We truly appreciate the Committee members for sharing their perspective and for all they and their firms do for NALSC.

“The Committee currently is assisting with two initiatives, both of which involve NALSC's ongoing search for law firm supporting members to host events in various cities.”

U-LPQ Update – A Case in Point

by Mitch Satalof

Now that the U-LPQ has been with us for a year or so, how has it impacted our effectiveness as recruiters and law firms engaged in lateral partner recruitment?

To be frank, too many search firms are reticent to use it for fear they'll run into a roadblock at the law firm level. This is hardly the case in the initial stages of lateral partner candidate representation.

Let's dig into it.

Case in point: A few months back, a West Coast recruiter who knows my work at NALSC contacted me about a partner candidate he knew who was now considering change. His dilemma was that this candidate worked and resided on the East Coast and the recruiter's focus was left coast in terms of placements.

The recruiter wasn't sure the partner had a book sufficient to make a transition, but the partner had solid credentials and longevity at their present firm. So, he contacted me as a first step towards an introduction.

After a few conversations with the partner, it was still unclear if they had enough tangible business to undertake a lateral move. So, I took the plunge.

"Let's do an exercise that will bring clarity to your value," I suggested. I introduced him to the U-LPQ and the addendum, as well. *"If you'll put the time and effort into providing me with this information, we'll both have a more concrete understanding of the business you bring and where that might fit into our goal of your landing in another firm's NYC office. It may not be the last step in the process,"* I explained, *"but given this level of detail we can then game plan what's possible to a more definitive end."*

The partner agreed and a few days later, I had a completed U-LPQ and, to my astonishment, a track record of \$1mm+ in business annually over the past 3 years. This changed everything in terms of our outlook.

With my new awareness, and a clear vision of my partner's practice focus and skill set, we whittled down the possible landing firms to a solid half dozen.

Not wanting to offer the entire U-LPQ without sufficient cause or a request from the firms we approached, I carved out a few segments that indicated the partner's consistent business attainment and a nutshell version of their profile and goals for the initial presentation.

Every single firm bit and requested a full introduction. Now, we had significant interest from multiple firms.

"To date, approximately 50 firms, most of which are in the T200, have informed NALSC that they are open to accepting the U-LPQ as part of the partner movement process."

The process continued post introduction, with initial interviews that quickly escalated to LPQ requests. With my partner's busy schedule, and their permission, we offered the U-LPQ as an instant fix to many of the firms' deep dive questions. The client addendum was also provided.

In this instance, each firm was grateful for the information and proceeded with further meetings, yet they all eventually stated they needed the LPQ info on their own form. With the previously filled-out U-LPQ, transposing the information moved quickly (as needed on a per firm basis), and the vetting process moved quickly, as well.

My partner candidate now is considering a very worthy offer from one of the firms we approached. He's planning to accept.

I'm highly doubtful that any of this would have transpired without the use of the U-LPQ. And I'm very proud that I had the opportunity to contribute to its development.

And, oh yeah, the other recruiting firm on the West Coast is loving what NALSC brings in terms of working relationships. Where else can you go to find an already trained, highly experienced recruiter in an area that's not your first line of daily communication? Just hand off a possible placement and sit back and wait for the check(s) to roll in.

A note on law firm acceptance of the U-LPQ

To date, approximately 50 firms, most of which are in the T200, have informed NALSC that they are open to accepting the U-LPQ as part of the partner movement process. Not all want their names broadcast as, in many cases, there's a COO who invested a small fortune in data entry and will push back if information doesn't come in exactly as he/she wants it.

Don't let that deter you; that's a secondary issue. No firm that I know of will turn down the opportunity to draw closer to a partner acquisition when good information is offered.

So, we may have to transpose info. So what? At that point, we know the time invested in transposing is a small step in concluding the lateral hire. Your partner candidate, if serious about the firm's request, should have no problem spending a few hours transferring the information they need onto the firm's form.

In all cases, in the beginning of a candidate relationship, you're asking a lot of questions to understand who and what your partner is and brings along with them. Get it in U-LPQ form at the early stages, and you'll have a very clear understanding of whether expending your energy on the candidate is even worth the time.

And maybe there's a very nice check at the end of the day.



ABOUT THE AUTHOR:

Mitch Satalof is the Immediate Past President of NALSC. He is also CEO of Juris Placements, Inc. Mitch devoted much of the past few years to the development of the U-LPQ, which for some, is an essential tool in harnessing the true value and understanding of a partner candidate.

P: (610) 825 7751

E: mitch@jurisplacements.com

W: www.jurisplacements.com

Counsel's Corner: When is a Law Firm Partner a "Partner"?

by Tina B. Solis, Esq. and Christina E. Kurow, Esq.

Many firms have adopted a two-tier partnership structure, consisting of equity and non-equity partners. But to the outside world including clients, these individuals are simply known as "partners" of the firm. A common question that arises in the lateral partner recruiting process is whether there is a distinction between equity and non-equity partners that could impact a lateral move. The answer is "it depends." It depends on how the law firm is structured, how the partners are compensated, and the laws of the relevant jurisdiction. Below are three of the most frequently asked questions regarding when is a law firm partner truly a "partner."

1. Compensation

Equity partners typically receive K-1 forms for tax purposes as owners of the law firm and are responsible for paying their own taxes, assuming a partnership structure as opposed to a corporate shareholder structure. Despite their "partner" title, many non-equity partners receive W-2 forms and are treated as "employees" for tax purposes, similar to associates and other firm staff. But the tax treatment for non-equity partners depends upon the firm. Some non-equity partners also receive K-1 forms, similar to their equity partners. It is important to understand how non-equity partners are characterized for tax treatment purposes at their current firm and how these non-equity lateral candidates will be characterized for tax treatment purposes at any potential new firm. The tax treatment can impact cash flow for a non-equity lateral candidate that may require budgetary planning, at least with regard to the year of the transition. Non-equity partners that receive W-2s and are treated as "employees" have an advantage over their counterparts that receive K-1s because employees are protected by certain state wage payment statutes if the firm does not pay the non-equity partner upon departure. Partners receiving K-1s are not afforded such protections.

"A recruiter cannot simply assume that a candidate who has a 'partner' title will be treated the same as another candidate at the same firm who also holds a 'partner' title."

Usually, only equity partners are required to make capital contributions to the firm. More recently, however, some firms have started to require non-equity partners to make capital contributions – *albeit* smaller than the contributions required from their equity ranks. Some firms also subject non-equity partners to deferred compensation, as they do with equity partners. Recruiters must be cognizant of these issues as they help navigate a lateral candidate through the process because these issues can materially impact a non-equity partner's bi-weekly or monthly "take home" pay.

2. Discussing possible lateral moves with others at the firm

Under the laws of most states, equity and non-equity partners can discuss making a lateral move together. For instance, under New York and

Illinois law, partners can solicit other partners pre-departure, but not employees (associates and staff). See *Gibbs v. Breed, Abbott & Morgan*, 271 A.D.2d 180, 185 (N.Y. App. Div. 1st Dep't 2000); *Dowd and Dowd, Ltd. v. Gleason*, 352 Ill. App. 3d 365, 377 (1st Dist. 2004). Courts do not typically make a distinction between associates and staff members of the firm with respect to pre-resignation solicitation – partners may not solicit either before he or she departs the firm. *Dowd*, 352 Ill. App. 3d at 377.

Some firms include non-solicitation provisions in their partnership agreements in an attempt to prevent additional attorney and employee departures. Depending on how these provisions are worded, they may or may not be enforceable. It is critical to review these provisions in the partnership agreement in addition to the relevant state laws and ethics rules.

3. Notice provisions

Notice provisions in law firm partnership/shareholder/member agreements are commonplace in the profession today. Firms may hold equity and non-equity partners to the same notice periods, but not all do. Some firms do not have any notice period for non-equity partners. Others have shorter notice periods for their non-equity partners compared to their equity partners. It is critical to review the partnership agreement closely to determine which notice period, if any, applies to a partner departing the firm. To the extent a partner is subject to a notice period, the next consideration is making certain he or she complies with the requirements of providing the notice of the resignation/withdrawal, itself, and then complies with the terms of the subsequent notice period.

In short, a recruiter cannot simply assume that a candidate who has a "partner" title will be treated the same as another candidate at the same firm who also holds a "partner" title. The same is true of a group of partners that may be departing together. It is imperative that the recruiter and each individual candidate understand the specifics of his or her partnership agreement. Recruiters should recommend that the lateral partner candidates consult with counsel familiar with this area of law in advance of a partner departure.

ABOUT THE AUTHORS:

Tina B. Solis, Esq.
Partner, Nixon Peabody in Chicago
P: (312) 977-4482

E: tbsolis@NixonPeabody.com
W: www.nixonpeabody.com



Christina E. Kurow, Esq.
Counsel, Nixon Peabody, Chicago
P: (312) 997-4642
E: ckurow@nixonpeabody.com
W: www.nixonpeabody.com

"The best recruiters spot the ethics issues and refer you to capable outside ethics counsel sooner than later," Dan Binstock writes.

Reprinted with permission from the September 20, 2024 edition of *Law.com*® 2024 ALM Media Properties, LLC. All rights reserved. Further duplication without permission is prohibited, contact (877) 257-3382 or reprints@alm.com.



As we approach the fourth quarter, there are many partners getting ready to move. Many will wait until the beginning of the new year (after final distributions and bonuses). But some will move before that time because the new firm will make them whole. Brace for a lot of announcements over the coming six months.

In my experience, the one thing that many partners often overlook—or delay too long—is understanding the various duties and ethical obligations they have. These include their:

- Contractual obligations to your current firm (via your partnership agreement).
- Fiduciary duties to your current firm/partners (by virtue of being an owner).
- Your fiduciary duties to your clients' best interests.
- Your own personal interests.

As we see, there are some competing interests here.

According to Tina Solis, a partner at Nixon Peabody who is very experienced in lateral partner ethics issues, "The client's best interest is the first priority, your fiduciary duty to a firm is a close second, and the departing attorney's personal interests come last. Both the departing attorney and the firm have ethical responsibilities to the clients to ensure that their

representation is not adversely affected by the attorney's departure."

Tina also emphasizes that some of the most important times to engage ethics counsel are when you're dealing with a "big book of business or key clients who may leave, there are large receivables pending, there's an upcoming trial or large deal that's imminent, the current firm is in extremis, or there's likely to be bad blood."

Because most partner disputes go on behind the scenes and never reach the press, it's the search firms and ethics counsel who see what can frequently happen when things spin out. And it can be incredibly stressful. Ethics counsel can be a low-cost insurance policy.

The below checklist highlights the key questions you should be mindful of at each stage of the process, which can help inform whether you should engage outside counsel. Brief aside: while many legal recruiters are former practicing attorneys, not all are. And even if they are also lawyers, they are not able to function in a legal advice-giving capacity during the process. The best recruiters are the ones who spot the ethics issues and refer you to capable outside ethics counsel sooner than later.

Housekeeping Issues/Timing

- Have you reviewed your partnership agreement? (Most partners

sheepishly answer, "Um, I haven't seen it since I became a partner X years ago." If that's you, don't worry, you're in good company.)

- A note about partnership agreements. According to Hilary Gerzhoy, vice chair of the legal ethics and malpractice group at HWG, "Much as firms may try to act otherwise, neither lawyers nor clients are firm property. The Rules of Professional Conduct provide significant protection for lawyers making lateral moves ... [and] [f]irms often make assertions about what lateral partners can and cannot do that are inconsistent with the Rules. So before a lawyer even looks at her partnership agreement keep in mind: if any term within your partnership agreement conflicts with the Rules, the term is likely unenforceable as against public policy." See Hilary Gerzhoy, "[Navigating Lateral Moves: Key Provisions in Partnership Agreements](#)" (NALSC Newsletter, Winter 2024).
- Do you understand when your final distributions and bonuses will be paid out?
- How much discretion does the firm have to withhold your money if you leave on less-than-ideal terms?
- How long does the firm have to repay your capital contribution? What do you do if the new firm requires capital up front, but your prior firm has several years to pay you back?
- Are there clawback provisions?
- What type of notice do you need to give if you decide to move?
- Is the firm's notice period actually enforceable based on recent options?
- Based on the above, what is the ideal time to actually leave so you don't leave too much money on the table?

During the Interview/Due Diligence Process

How much information are you permitted to disclose about the finances of your practice (e.g., billing rates, discounts, etc.)?

- How much information are you permitted to disclose about your clients in a way that balances the new firm's ability to evaluate your practice and conflicts without breaching your duty of confidentiality to your current firm?
- Do you need to disclose your current compensation? (It can differ by jurisdiction and on the basis of whether you are an equity or nonequity partner.)
- With whom in your firm can you discuss potentially leaving without breaching your fiduciary duty or rule against soliciting employees?
- If the new firm wants to call current clients as references—which essentially causes you to have to come clean to certain clients—how do you best respond?

Accepting an Offer

If you want to accept an offer but need to wait some time before giving notice, how do you avoid "riding two horses" at once and potentially violating your fiduciary duty to your current firm?

Giving Notice

- Do you first inform your firm or your clients?

- How long do you wait to inform your clients about your move?
- What is the best way to inform your clients about your move?
- What is the best way to inform your colleagues (including associates and others)?
- What if your firm tries to prevent you from speaking to clients after giving notice?
- How will your firm respond, and will there be bad blood?

Other Separation Issues

- What if your current firm does not permit you to leave for a much longer period of time than anticipated? Can this be negotiated?
- What if your current firm tells you not to speak to your clients until after they do?
- What if the firm threatens to withhold a bonus payment if you try to encourage your clients to follow you to your new firm?
- Who sends the client transfer letters to your clients?
- What information are you able to keep?
- When are you able to recruit key team members?

I don't think there's a single partner (other than an ethics attorney) who can answer these. But if you speak to partners who have lateraled, these are still important questions that can and often do arise.

This area of law is admittedly murky, with a sliding-scale approach that balances the law and business realities. The best ethics attorneys are those who not only know the law in your jurisdiction but can balance the law against the reality of the lateral hiring process. This is not an easy area of law, and somebody who also understands compensation structures and the nitty-gritty of law firm finances is a must.

If you find yourself potentially facing or struggling with some of these issues, you should speak to ethics counsel or educate yourself on the rules. (For a 2021 video interview with Tina on the key ethical considerations of a partner move, which is still very relevant today, see [here](#).) While I've had some partners gripe about paying an outside attorney (even when the ethics attorney's rate is much lower than their own), they virtually always immediately come back and thank me for the referral after the first call. The old quote "a lawyer who represents himself has a fool for a client" still does hold true today, especially in the high-impact lateral partner market.

ABOUT THE AUTHOR:

Dan Binstock, Esq. is a partner at Garrison, an attorney search firm based in Washington, D.C., where he specializes in lateral group and partner placements. If you have a question regarding legal recruiting, or a topic for an upcoming column, he can be reached confidentially at dbinstock@g-s.com or 202-559-0472.

Dan is also a NALSC Board Member and Chair of NALSC's Ethics Committee.



NALSC® BOARD OF DIRECTORS

Melissa Peters
NALSC President
MP Legal Search, LLC
(917) 620-9387
mpeters@mplegalsearch.com

Jordan Abshire, Esq.
NALSC VP-Strategic Planning
Abshire Legal Search LLC
(704) 817-8272
jabshire@abshirelegalsearch.com

Ethel Badawi, Esq.
NALSC Secretary
Pollack Badawi Group LLC
(202) 714-4230
ebadawi@pbgsearch.com

Dan Binstock
Garrison & Sisson
(202) 559-0472
dbinstock@g-s.com

Kevin R. Bacon, Esq.
Bacon Legal Recruiting
(614) 578-2655
kbacon@baconlegalrecruiting.com

Connie Rinaldi, Esq.
Project Recruit
(917) 412-3378
connie@projectrecruit.com

Arthur Polott (Director Emeritus)
Gateway Legal Placements, LLC
(202) 470-5220
arthur@gatewaylegal.com

Mitch Satalof (Immediate Past President)
Juris Placements, Inc.
(610) 825-7751
mitch@jurisplacements.com

Mary Clare Garber
NALSC VP-Membership
Princeton Legal Search Group, LLC
(201) 301-7820
mclgarber@princetonlegal.com

Ross Weil
NALSC Treasurer
Walker Associates
(646) 503-4600
rweil@walkersearch.com

Natalie Thorsen Harris
Phyllis Hawkins & Associates, LLC
(602) 263-0248
natalie@azlawsearch.com

Esther Alpert, Esq.
Alpert Associates, LLC
(703) 567-2427
ealpert@alpertassociates.com

Jennifer L. Gillman, Esq.
Gillman Strategic Group, LLC
(908) 389-7996
jgillman@gillmanstrategicgroup.com

Stuart TenHoor, Esq.
Stuart TenHoor Legal Search
(202) 412-7655
stuart@stuarttenhoor.com

Patrick Moya (Director Emeritus)
Quaero Group
(303) 729-0000
info@quaerogroup.com

Contact Us

Newsletter Committee

Jennifer L. Gillman, Esq. (Chair)
Gillman Strategic Group, LLC
(908) 389-7996
jgillman@gillmanstrategicgroup.com

Melissa Peters
MP Legal Search, LLC
(917) 620-9387
mpeters@mplegalsearch.com

Jordan Abshire, Esq.
Abshire Legal Search LLC
(704) 817-8272
jabshire@abshirelegalsearch.com

Natalie Thorsen Harris
Phyllis Hawkins & Associates, LLC
(602) 263-0248
natalie@azlawsearch.com

Kevin R. Bacon, Esq.
Bacon Legal Recruiting
(614) 578-2655
kbacon@baconlegalrecruiting.com

Newsletter Advisor
Valerie Fontaine, Esq.
SeltzerFontaine
(310) 842-6985
vfontaine@seltzerfontaine.com

NALSC® Headquarters
Stephanie H. Ankus, Executive Director
12555 Orange Drive, Suite 4207
Davie, FL 33330
(954) 862-1761
info@nalsc.org
www.nalsc.org

Views and information expressed or recommended by the articles &/or authors herein are theirs alone and not necessarily those of NALSC® or the editors of this newsletter. All information contained herein is for informational purposes only and is not to be relied upon for any legal, tax or financial information without consulting with the appropriate independent professional.

NALSC® PLATINUM, GOLD AND SILVER SPONSORS:

