



## **LAW 2008 AGM Special-Edition Newsletter**

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## **Chairman's Corner**

Greetings to All:



It is time again for the most important LAW event of the year - the Annual General Meeting - this year in Washington D.C. Our hosts, Cohen Mohr LLP, staff and other planning team members have put together an AGM that will hopefully go down in the books as the best attended, best planned, and most memorable annual general meeting in LAW's history.

When packing to travel to Washington D.C., you need to be sure to include all of the following in your luggage:

1. Thoughtful list of all of the ways that being a member of LAW has had a positive effect on your firm;
2. Notes of "success stories" in which your firm has interacted with other LAW members over the past year;  
and
3. Examples of how your firm has used its membership in LAW to help market its practice, serve its clients, and improve its competitive position and reputation in your local market.

Other meeting preparations should include:

4. Visiting the LAW Website ([www.lawyersworldwide.com](http://www.lawyersworldwide.com)) to review and update all of the information on your Member Firm Page. [Mark up a printed copy of your page with all of the needed changes, and give the markup to a member of our staff at the meeting who can make the changes for you.]

5. Visit the LAW Website (again), and enter all referrals that your firm has made or received since the last update in our Referral Database.

As you head to the airport, make sure that you are bringing a positive attitude and a sense of anticipation and adventure. You will be seeing and re-connecting with old friends whom you have come to know from prior meetings and whom you may only get to see face-to-face once a year. But you will also see many "new faces." Some will belong to new members, applicants and observers representing firms that joined LAW since the last AGM in Zurich/Lucerne or that are considering membership at this time. Other "new faces" will belong to new and additional delegates from long-standing member firms. Challenge yourself to meet these "new faces" and get to know more about them and the firms that they represent during your stay in Washington D.C. There will be lots of opportunities to mingle and network. Come prepared to take advantage of these opportunities.

Finally, make sure that you carry with you at all times your sense of humor and your sense of collegiality. These are important ingredients for all LAW meetings, but they are especially important at AGMs.

If you have packed and prepared yourself as suggested above, then it's time to head to the airport and start your journey to Washington D.C. I know that you will have an enjoyable, productive and fun time at this year's meeting.

I look forward to seeing each one of you in Washington, DC.

Christopher C. McCracken  
Chairman

## Welcome to Washington DC

August 7, 2008

GREETINGS TO ALL OUR FRIENDS AT LAW



As your host, we hope to see you at the upcoming AGM in Washington, D.C. from September 17 – 20, 2008.

Our firm's first AGM was in Los Angeles in 2000. We thoroughly enjoyed that meeting as well as all the other meetings that followed. The 2008 AGM is shaping up to be one of the best. We've got a stimulating program planned, one that will focus on developing new business opportunities for all of us. Two items on the agenda are noteworthy. One is a panel discussion among general counsels

of large corporations who will share insight into their outside counsel selection process. The other is a structured networking session led by a professional client development and relationship coach.

There is also much to do and see in our fair city on the Potomac, so bring an appetite for history, science, art, fine dining, and good drink. Don't forget to pack your walking shoes. And don't forget to polish up your views on U.S. presidential politics as Washingtonians will be abuzz with our upcoming and potentially historic November 4<sup>th</sup> presidential election. Speaking of elections in Washington, this AGM will be significant in that LAW members will elect a new chairman and vice-chairman.

All of us at Cohen Mohr are excited at hosting this AGM and extend to each of you our warmest welcome. See you in September!



## Sponsors

### **GLOBAL SOLUTIONS – A DIVISION OF FIDELITY NATIONAL TITLE GROUP, INC.**

Global Solutions is the international title insurance division of Fidelity National Title Group (FNTG). Global Solutions works with FNTG's respected family of underwriters - Fidelity National Title, Chicago Title, Ticor Title, Security Union Title and Alamo Title - to protect real estate investors with ALTA-like title



insurance policies covering transactions in more than 50 countries across five continents. What's more, Global Solutions' title commitments, policies and endorsement forms are governed by U.S. law, and its escrow services are bonded and secure. For further peace of mind, Global Solutions offers unmatched protection of claims reserves of more than US\$1 billion.

The real estate closing process in many countries can be cumbersome and perplexing. Global Solutions' experience with property conveyances in global markets helps clients expertly navigate unfamiliar customs or practices.

Global Solutions offers a number of advantages for real estate transactions beyond North America. Policies offered through FNTG's underwriters will:

- Defend any covered claims or attacks on title in the local jurisdiction
- Cover the cost of defense in the local jurisdiction
- Provide additional due diligence in line with U.S. standards to identify any missing interest or other title defects not typically found in local practices
- Provide coverage as to parties in possession and certain off-record items not covered by opinions of counsel
- Cover surveys, provided an acceptable survey is available
- Eliminate the need for reinsurance by paying claims against billion-dollar-plus U.S. reserves

- Quickly provide a title search and opinion letter

Rudy Rivera will be representing Global Solutions among others.

## LOGIC 100

Logic 100™ raises the bar on what has been traditionally considered as the ultimate in professional practice software platforms for financial planners, *lawyers*, accountants and brokers. Totally Web-based, secure to bank standards, it provides real time excellence in simplicity, holistic functionality and demonstrable features and benefits.



Logic 100 Limited is an Australian Public Company, specialising in the design, hosting and management of Microsoft DotNET® software platform solutions for the Professional Practices markets including Financial Planning License Holding Groups, their networks of authorised representatives, Legal and Accounting Practices. Logic 100 Limited is a Microsoft Partner Development Company with offices and development teams in Australia, Britain, Hong Kong, South Africa and India.

Its service and hosted solutions include:

- Customer Relationship Management (CRM) Solutions
- Practice Management Dashboards (a dashboard is a small, defined set of key metrics used to provide a quick evaluation of a project or process status)
- Customisable report writers with integrated mail merge systems
- Financial Planning software platforms delivering full automated compliance management, Statement of Advice production and whole of life cash flow modeling
- Integrated live data feeds for product research reports and portfolio valuation updates
- On-line document storage for our clients and their customers
- Fully automated approved form of document production (SoA, SoAA, RoA, Limited Advice Statement, Suitability Letter etc).
- Automated compliance by prevention, management and control inbuilt;
- Whole of life cash-flows at the touch of a button;
- Data feeds for research and portfolio updates included;
- Full CRM, tailor-able report writer and mail merge facilities via mail, email and SMS included;
- Secure document storage for you and your clients

With Logic 100™ you can deliver personalised and cost effective mass communications to all your clients at the touch of a button, plus...

- Store all your clients' documents safely and securely
- Create on-line deal rooms
- Give your clients an on-line tool where they can upload their own digitized documents and files
- A customisable Legal Health Check creating lead and fee flow is fully incorporated with each clients licence
- Time based billing data is delivered by client file with full audit trail time and date stamped records

Representing Logic 100 from Melbourne, Australia are David Daniel, CEO, Andrew Smith, EGM Corporate Services and Paul Wyatt, Sales and Marketing Director, who will be presenting to delegates at the AGM.

## **MORGAN STANLEY**

Morgan Stanley is this year's sponsor for the event at the Hay-Adams hotel.

Morgan Stanley is a leading global financial services firm providing a wide range of investment banking, securities, investment management and wealth management services. The firm's employees serve clients worldwide including corporations, governments, institutions and individuals from more than 600 offices in 33 countries.

Morgan Stanley is bringing veteran commodity trader, Joe Terranova of CNBC's "Fast Money," who will be speaking to the delegates.



Mr. Terranova is a CNBC contributor and frequent panelist for the highly-rated CNBC evening program "Fast Money." He's been a guest on Bloomberg TV, and CNN (and FOX), as well as quoted in a variety of financial media publications. For more than 12 years he wrote a daily energy market commentary that is widely popular within the energy industry and hedge fund community. Currently, Joe Terranova is Chief Alternatives Strategist for Phoenix Investment Partners, a position he has held since joining the company in 2008. In this role, Joe is responsible for directing the investment strategies related to alternative investments, including commodities, currencies, real estate and hedge funds.

Representing Morgan Stanley are Richard Greenspan, CIMA, and Senior Vice President of the Greenspan Group at Morgan Stanley and Jonathan Adamsky, First Vice President who will be jointly presenting to the delegates at the meeting.

## Speakers

### Juval Aviv / Interfor Inc.



Juval Aviv is President & CEO of Interfor, Inc., an international corporate intelligence and investigations firm. Founded in 1979, Interfor, Inc. works with U.S. and foreign law firms, leading financial institutions, multinational corporations, insurers and governmental agencies in conducting investigations throughout the world.

Before founding Interfor, Mr. Aviv served as an officer in the Israel Defense Force (Major, retired) leading an elite Commando/Intelligence Unit and was later selected by the Israeli Secret Service (Mossad) to participate in a number of intelligence and special operations in the late 1960s and 1970s. In 1984, a true account of one mission that he led was published in a book entitled *Vengeance*, by George Jonas. The book became a best seller and was later the basis for the HBO film, *Sword of Gideon* and Steven Spielberg's *Munich*.

As head of Interfor, Mr. Aviv can call upon more than 30 years of experience conducting international investigations into white-collar crime at scores of multinational companies. He has personally solved numerous cases of fraud, counterfeiting, embezzlement, anti-competitive behavior, and violations of the Foreign Corrupt Practices Act in the banking, insurance, aerospace, entertainment, pharmaceutical, and aviation industries, to name just a few. Interfor is highly regarded for its investigation services, including due diligence and asset search and recovery. Since its inception, Interfor's asset investigation services have recovered over \$15 billion worldwide for its clients.

A leading authority on terrorist networks and their inner workings, Mr. Aviv served as lead investigator for Pan Am Airways into the Pan Am 103-Lockertie terrorist bombing. In addition, while working as a consultant with El Al Airlines, Mr. Aviv conducted a survey and update of the airline's security program that has made El Al the safest airline in business today.

Mr. Aviv is the author *Staying Safe: The Complete Guide to Protecting Yourself, Your Family, and Your Business* published by HarperResource, a division of HarperCollins Publishing. In *Staying Safe*, Juval Aviv outlines the essential tools for becoming personally responsible for the security and safety of yourself and your loved ones. Mr. Aviv is also the author of *The Complete Terrorism Survival Guide* (Juris Publishing); *Max*, a fictionalized account of the investigation into the death of British media mogul, Robert Maxwell (Random House); and *Flight 103*, a fictionalized account of the investigation into the bombing of Pan Am Flight 103.

Mr. Aviv has been a speaker and panel participant for many organizations including the FBI, the U.S. Department of Justice - Office of the U.S. Trustee, the Internal Revenue Service, The Ontario Securities Commission, Smith Barney, Aon Insurance, INSOL and the American Bankers Association. In addition to his speaking engagements, Mr. Aviv has been a frequent contributor to articles and programs on U.S.

preparedness relative to various forms of terrorism. He serves as a consultant on counterterrorism for the FOX News Channel and has been a frequent guest on ABC's "Nightline", CNN, CNN International, MSNBC, ESPN, The History Channel, as well as BBC's "Newsnight," Channel 4's "Sharkey's Last Word", ZDF (German National Television), RAI (Italian National Television) and has been featured in numerous articles in major magazines and newspapers worldwide such as *The Wall Street Journal Europe*, *The Financial Times*, *The Boston Globe*, *The Chicago Tribune*, *The Toronto Sun*, *The San Francisco Chronicle*, *The Philadelphia Inquirer*, *The New York Times*, and *The Economist*.

### **Stewart M. Hirsch, JD**



Stewart Hirsch is the principal of Strategic Relationships, a business development coaching and training firm. For the past 14 years, Stewart has provided individual, team and group coaching to lawyers and other professionals, as well as relationship development workshops.

Stewart helps lawyers boost success with clients, potential clients and referral sources, by helping them recognize and capitalize on opportunities to enhance internal and external business relationships. His work includes assisting with developing plans, and both strategic and tactical approaches to executing plans, while integrating strong communications skills, developing long-term and trust-based relationships and carrying out productive conversations.

Hirsch will lead a breakout session on Thursday afternoon for delegates on how to "work a room – a global perspective." Hirsch will discuss the attitudes and skills and a step-by-step process to meet and communicate with business associates and strangers. He will facilitate a discussion on what to say and do, and how to set up the follow-through. There will be a discussion of local customs, and how to improve working a room when in other jurisdictions. He will also lead sessions on Friday morning on best practices in LAW and networking and business development between firms with discussions on ways to use your LAW membership to enhance business development and to understand each others' marketplace opportunities for members' mutual benefit.

## **General Counsel Panel**

The AGM will present a panel of international general counsels from the Royal Bank of Canada, Medtronic Inc., and Realogy Corporation.

### **Murray Aust**

#### **Senior Counsel of Royal Bank of Canada - Toronto, Ontario, Canada**

Murray Aust is Senior Counsel with Royal Bank of Canada. Royal Bank of Canada and its subsidiaries operate under the master brand name of RBC. RBC provides personal and commercial banking, wealth management services, insurance, corporate, investment banking and transaction processing services on a global basis. RBC employs more than 70,000 full and part-time employees who serve more than 15 million personal, business, public sector and institutional clients through offices in Canada, the U.S. and 39 other countries.

Murray is responsible for the development and implementation of initiatives to manage the cost and quality of legal services delivered to Royal Bank Financial Group globally by developing and managing strategic relationships with external legal service providers and creating a centre of expertise within the Royal Bank Law Group for their selection, engagement and management. Murray has worked for RBC since his call to the Bar of Ontario in 1981 as head of the Ontario law function, as counsel in Toronto to the Bank's Multinational and International divisions and its venture capital subsidiary, and in London, England as counsel to the Bank's European headquarters and its investment bank subsidiary.

### **Jan Symchych**

#### **General Counsel of Medtronic - Minneapolis, Minnesota**



Jan Symchych came to Medtronic in May 2005 as Vice President and Deputy General Counsel for Litigation. Medtronic, Inc., headquartered in Minneapolis, is the global leader in medical technology – alleviating pain, restoring health, and extending life for millions of people around the world. She has responsibility for all Medtronic litigation, and works with corporate, business-unit, and geography units of the Company.

She came to Medtronic after 15 years in private practice, where she served as first chair trial counsel for companies in government enforcement proceedings, class actions, health care regulatory enforcement matters, and commercial litigation. Before private practice, she served as a United States Magistrate Judge in the Minnesota federal courts, where she handled settlement proceedings, civil discovery, and pretrial motions in civil and criminal cases. Before that she was both an Assistant United States Attorney and state court prosecutor, and tried many jury cases.

As part of this work, she regularly had responsibility for regulatory enforcement and corporate compliance issues, as well as internal investigations.

### **Pat Cardwell**

#### **Former General Counsel of Realogy Corporation - Parsippany, New Jersey, USA**



C. Patteson "Pat" Cardwell, IV is currently the Executive Vice President and General Counsel of Intero Holdings, Inc. while simultaneously serving as Of Counsel at the Washington DC law firm of Cohen Mohr. At Cohen Mohr, Mr. Cardwell represents franchisees and franchisors in various industries in their day to day business operations, whether such representation includes, disclosure, misrepresentation, fraud and other related issues.

Prior to joining Intero and Cohen Mohr in April of 2008, Mr. Cardwell spent 11 years with Realogy and its processor entities Cendant Corporation and Hfs Incorporated. Realogy Corporation, is a global provider of real estate and relocation services, has a diversified business model that includes real estate franchising, brokerage, relocation and title services.

Upon Realogy's spin off from Cendant Corporation, Mr. Cardwell served as General Counsel to the global provider of real estate, relocation and title and settlement services. Responsible for all legal matters involving Realogy's businesses, including (i) the real estate franchise group, the world's largest real estate franchisor which at the time had over 5,000 franchisees having approximately 15,000 offices and 310,000 sales associates operating under the Coldwell Banker®, Century 21®, ERA®, and Sotheby's International Realty® brands; (ii) NRT Incorporated, the largest company owned full service real estate brokerage business in the United States with approximately 1,100 company owned offices and approximately 64,000 sales associates; (iii) Cartus Corporation, a leading global employee relocation services business; and (iv) TRG, Inc., a full service title and settlement services business.

## Schedules for Washington DC

### Delegate Schedule for AGM

Wednesday, 17 September 2008

- ❖ 1:00 p.m. – 3:00 p.m. Executive Committee Meeting
- ❖ 6:00 p.m. Reception and Dinner at the Fairmont Hotel
- ❖ Keynote speaker Juval Aviv, Interfor Inc.

Thursday, 18 September 2008

- ❖ 7:30 a.m. – 9:30 a.m. Breakfast
- ❖ 9:00 a.m. -12:30 p.m. Plenary Session including General Counsel Panel Discussion
- ❖ 12:30 p.m. – 2:30 p.m. Lunch with speaker – Joe Terranova of CNBC's *Fast Money*
- ❖ 2:30 p.m. – 4:30 p.m. Breakout sessions
- ❖ 6:00 p.m. – 11:00 p.m. Standing dinner on Rooftop of Hay Adams Hotel followed by moonlight tour of Washington monuments

Friday, 19 September 2008

- ❖ 7:30 a.m. – 9:30 a.m. Breakfast
- ❖ 9:00 a.m. – 12:30 p.m. Networking Business Development Sessions
- ❖ 12:30 p.m. – 1:00 p.m. Group Photograph
- ❖ 1:00 p.m. – 2:00 p.m. Lunch
- ❖ 2:30 p.m. – 5:30 p.m. Explore Washington D.C.
- ❖ 7:00 p.m. Dinner in various restaurants

Saturday, 20 September 2008

- ❖ 7:30 a.m. – 9:30 a.m. Breakfast
- ❖ 9:00 a.m. – 1:30 p.m. Business Meeting (closed to media and sponsors)
- ❖ 6:00 p.m. Gala Dinner at Red Cross Building

Sunday, 21 September 2008 (Delegates and accompanying persons)

- ❖ 9:00 a.m. – 5:00 p.m. Optional Tour to Mount Vernon and Old Town Alexandria
- ❖ 7:00 p.m. – Optional Dinner at Agraria Restaurant

**Accompanying Persons Activities**

Wednesday, 17 September 2008

- ❖ 6:00 p.m. Reception and Dinner at the Fairmont Hotel
- ❖ Keynote speaker Juval Aviv, Interfor Inc.

Thursday, 18 September 2008

- ❖ 7:30 a.m. – 9:30 a.m. Breakfast
- ❖ 9:45 a.m. – 4:15 p.m. Tour of Washington, National Portrait Gallery and Dupont Circle
- ❖ 6:00 p.m. – 11:00 p.m. Standing dinner on Rooftop of Hay Adams Hotel followed by moonlight tour of Washington monuments

Friday, 19 September 2008

- ❖ 7:30 a.m. – 9:30 a.m. Breakfast
- ❖ 9:15 a.m. – 5:00 p.m. Tour Option #1 – US Capitol and Smithsonian Museums
- ❖ 9:30 a.m. – 5:00 p.m. Tour Option #2 – Hillwood Museum & Gardens and Smithsonian Museums
- ❖ 7:00 p.m. Dinner in various restaurants

Saturday, 20 September 2008

- ❖ 7:30 a.m. – 9:30 a.m. Breakfast
- ❖ 9:30 a.m. – 3:15 p.m. Tour of Arlington National Cemetery and Georgetown
- ❖ 6:00 p.m. Gala Dinner at Red Cross Building

Sunday, 21 September 2008 (Delegates and accompanying persons)

- ❖ 9:00 a.m. – 5:00 p.m. Optional Tour to Mount Vernon and Old Town Alexandria
- ❖ 7:00 p.m. – Optional Dinner at Agraria Restaurant

## 2009 Meeting Locations

Below you will find the locations for the 2009 meetings, the host firm and the anticipated months when the meetings are to be held. More information will follow in the upcoming months.

### **Asia Pacific Regional Meeting**

Manila, Philippines (March) – hosted by Zambrano and Gruba Law Offices

### **Americas Regional Meeting**

San Diego, California, USA (April) – hosted by Klinedinst PC

### **Europe, Africa & Middle East Regional Meeting**

Budapest, Hungary (May) – hosted by Kovács Retí Szegheő Attorneys-at-Law

### **Annual General Meeting**

Singapore (October) – hosted by De Souza Lim & Goh LLP