DOWNEY LAW GROUP LLC

Legal Ethics and New Firm Business Models (including MSOs)

November 17, 2026

MO Bar CLE #799501 KS Activity #240370

© 2026 Downey Law Group LLC. For educational purposes only.

Connectivity/Technical Issues

Audio Issues – If you have audio issues on computer, please try accessing by phone at

(701) 801-6121

****No Access Code Required****

If problems persist, contact Paige Tungate at ptungate@DowneyLawGroup.com

Watch the slides at https://join.freeconferencecall.com/downeycle

Download the slides at http://www.downeyethicscle.com/

Questions – Please submit questions during the program through CHAT or during or after the program by emailing Paige Tungate at ptungate@DowneyLawGroup.com

DOWNEY LAW GROUP LLC

CLE Information

Kansas Credit – If you are seeking Kansas credit, you will need to enter the two Attendance Verification Words and your Kansas Bar information into the Program Survey

Please complete the Survey ***this week*** (if possible), so we can ensure you receive proper credit

Certificate of Completion – Available also through the Program Survey

Three ways to access Program Survey:

1. Chat - link available in the CHAT (right now)
2. Slides - Link in the slides (here or at www.DowneyEthicsCLE.com)
3. Email - Link sent to you in an email within 30 minutes of the end of this program

DOWNEY LAW GROUP LLC



https://www.surveymonkey.com/r/mso1126

DOWNEY
LAW GROUP LLC

Traditional Law Firms

DOWNEY
LAW GROUP LLC

Traditional Firm Structure

- Only lawyers own and run firm
- Owners work (practice) at the firm
- Firm may employ non-owners – lawyers and non-lawyers
- Lawyer may “sell” ownership interest pursuant to Rule 4-1.17 or otherwise

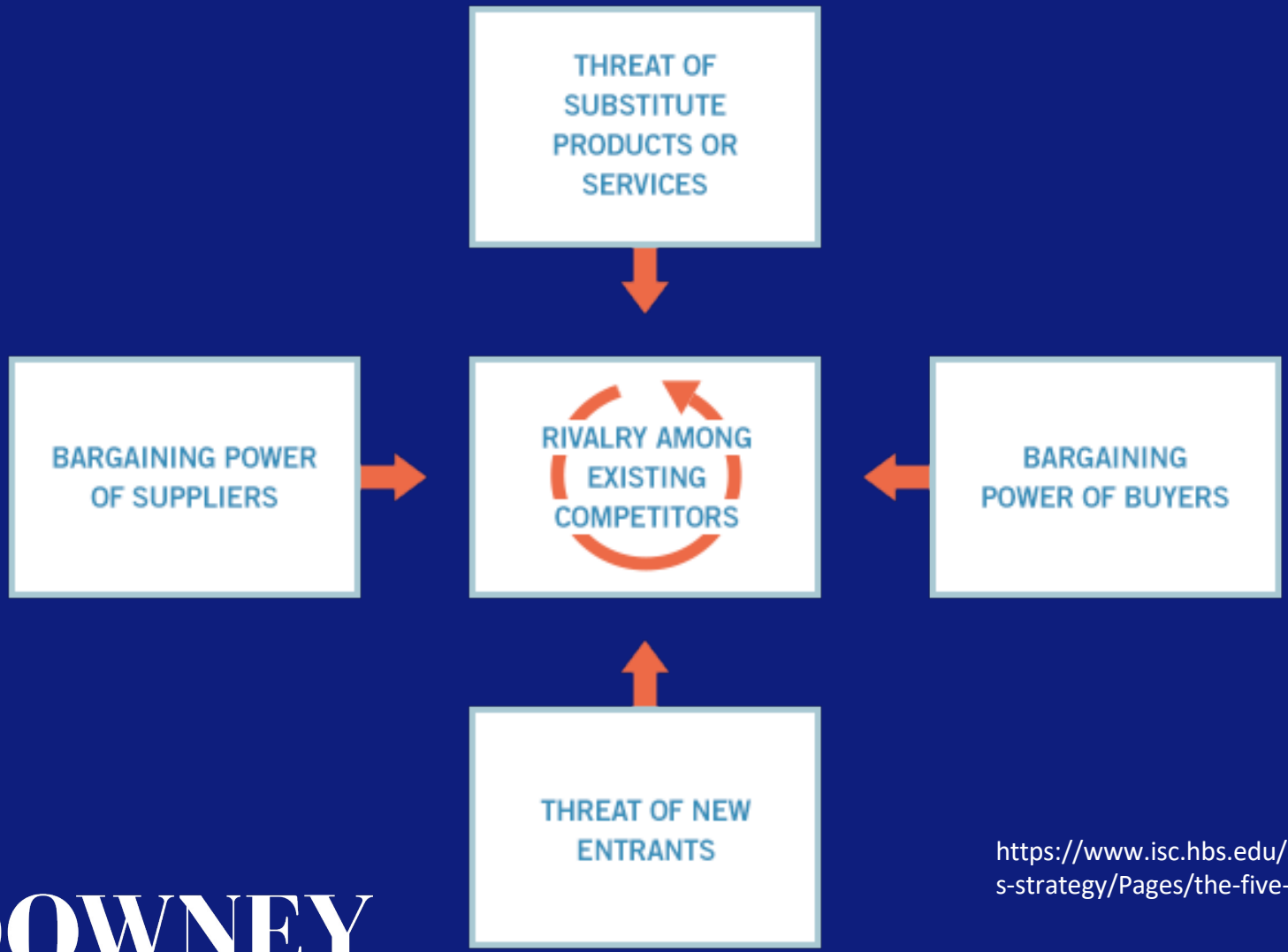
DOWNEY LAW GROUP LLC

Rules Buttress Traditional View

- Non-lawyer owners and managers prohibited (Rule 4-5.4)
- Owners responsible for supervising subordinate lawyers (Rule 4-5.1) and non-lawyers (Rule 4-5.3)
- Non-compete agreements are prohibited (Rule 4-5.6)
- Protection for independent judgment of lawyer (Rule 4-2.1)
- Protection for client role in decision-making (Rule 4-1.2)

DOWNEY LAW GROUP LLC

Porter's Five Forces Framework



https://www.isc.hbs.edu/strategy/business-strategy/Pages/the-five-forces.aspx

DOWNEY LAW GROUP LLC

(Some) Pressures on Traditional Model

- (Exponential) growth of firms
- Growth of in-house counsel – and AI . . . *See* AT&T/OpenAI LegalEdge
- Growth of matters – and related expenses
  - Burden of attorney fees
  - Growth of MDL cases
- Marketing and advertising expenses
- Technology and expenses
- Greater multi-state competition
- New market entrants, including Alternative Legal Service Providers (such as CPA firms, ABS entities, and AI)

DOWNEY LAW GROUP LLC

BLS reported unemployment rate of 0.6% for lawyers in October 2026.

6,000 total out of approximately 1.155 million lawyers.

DOWNEY LAW GROUP LLC

(Some) Consequences of Change

- Limited scope engagements
- Legal (Litigation) financing
  - But still champerty and maintenance concerns
- Heavy investments in technology



DOWNEY LAW GROUP LLC

Litigation Funding

- Pre- and post-settlement
- Commercial torts, mass torts, breach of contract, antitrust, intellectual property
- Litigation funding for a single case, a portfolio of cases, or all cases a firm or client has

DOWNEY LAW GROUP LLC

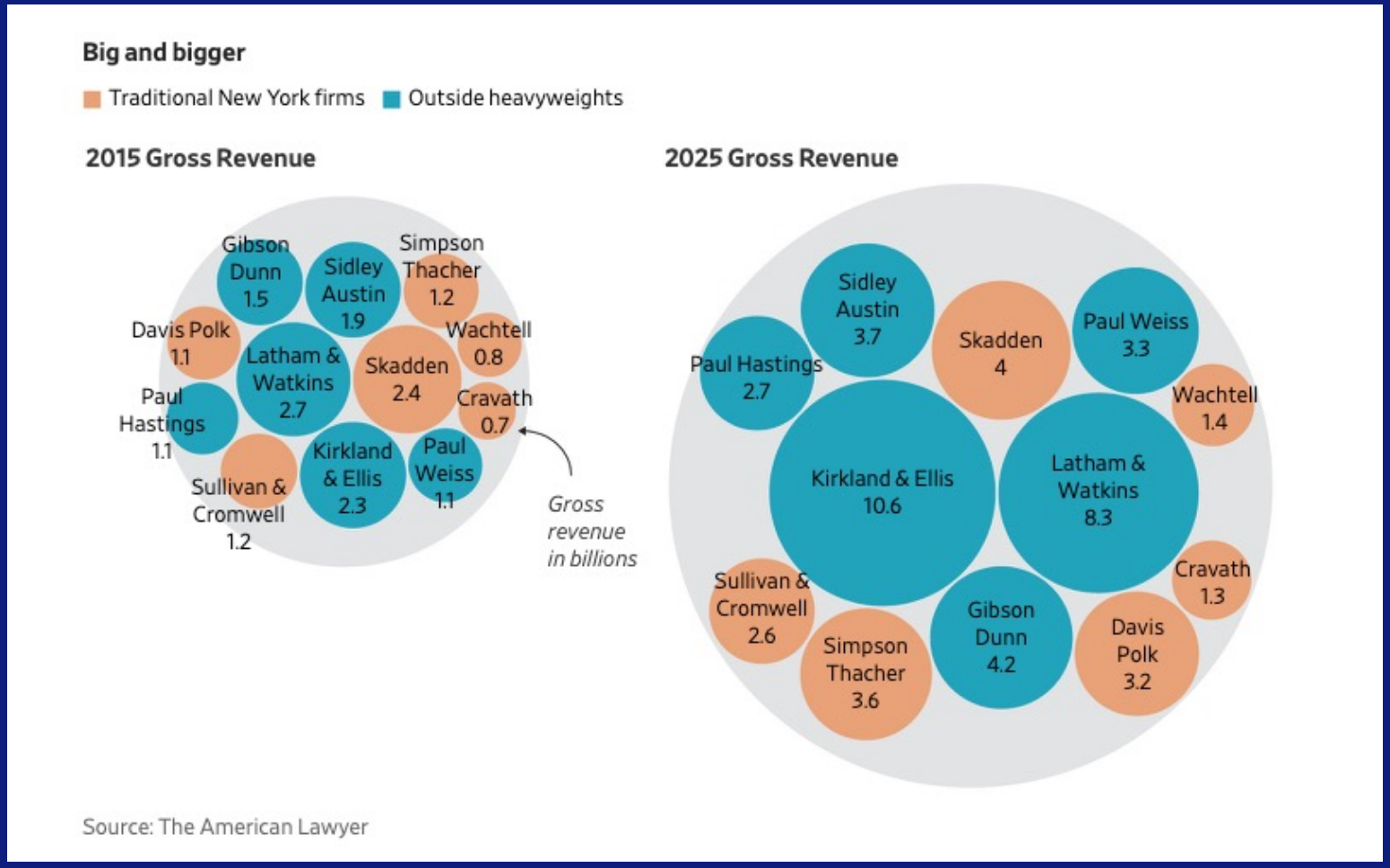
Competition for Talent – and Weil Gotshal's Demise

DOWNEY LAW GROUP LLC

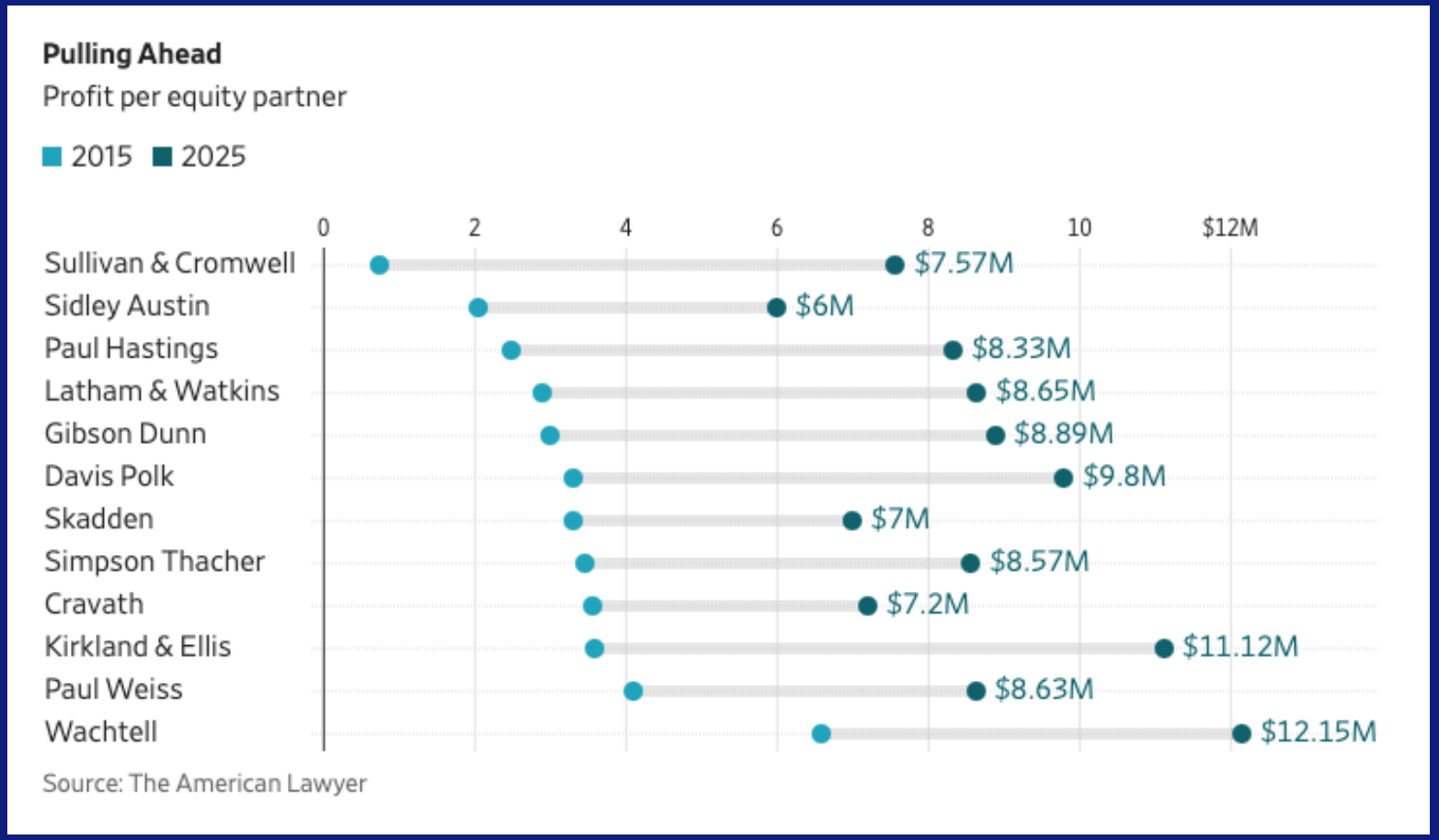
Competition for Talent

- Where will newer lawyers work?
- How will they be trained/developed?
- What demands will they make for pay and work environment?

DOWNEY LAW GROUP LLC

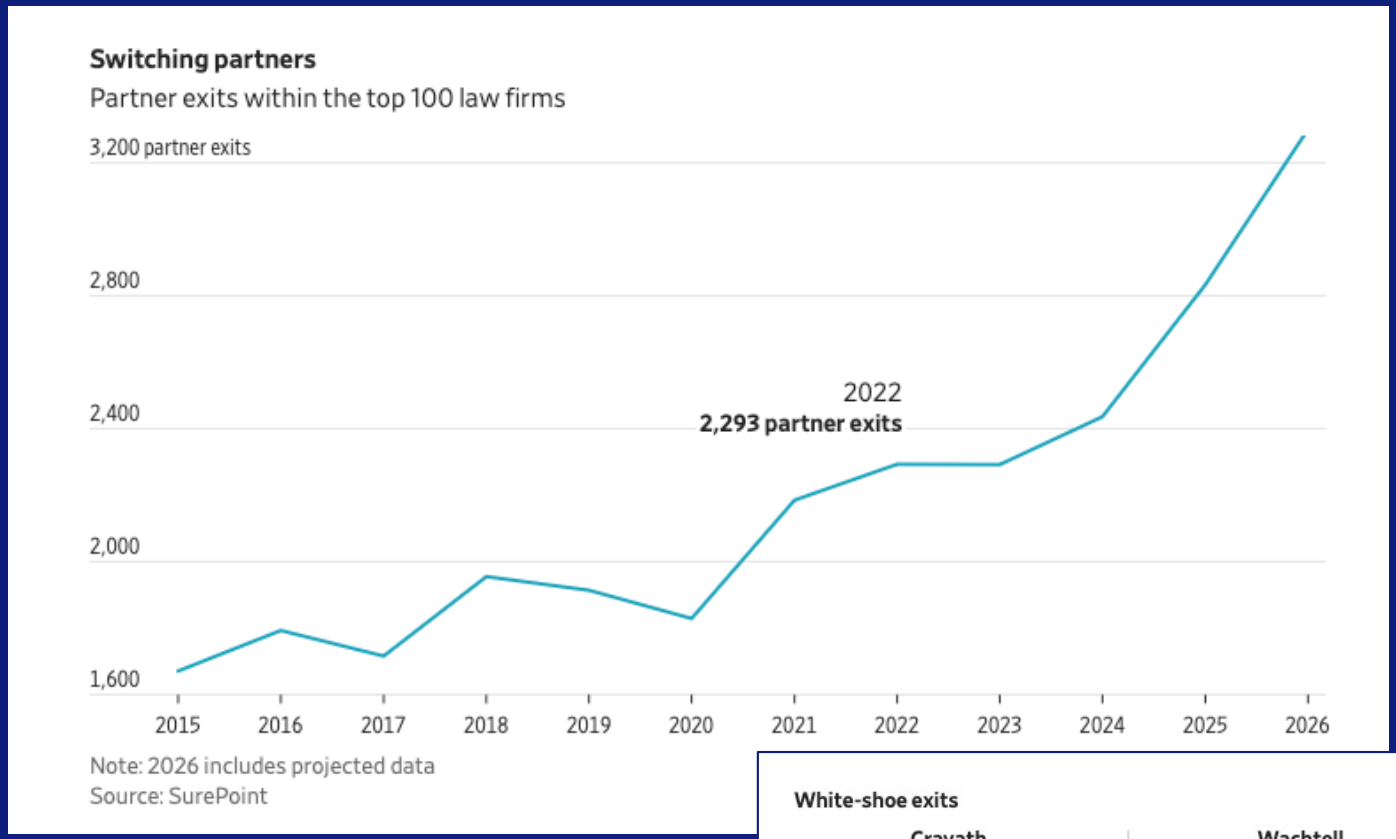


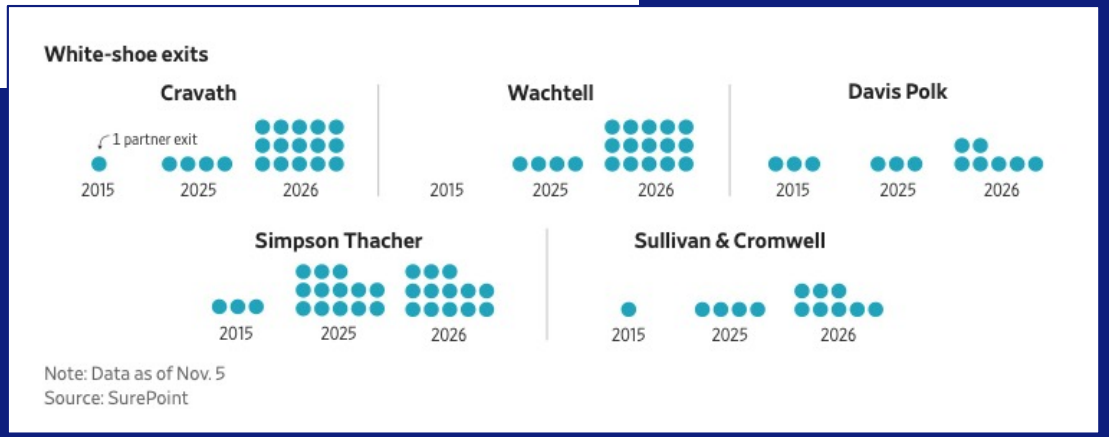
DOWNEY
LAW GROUP LLC



DOWNEY
LAW GROUP LLC

Market for Lateral Attorneys

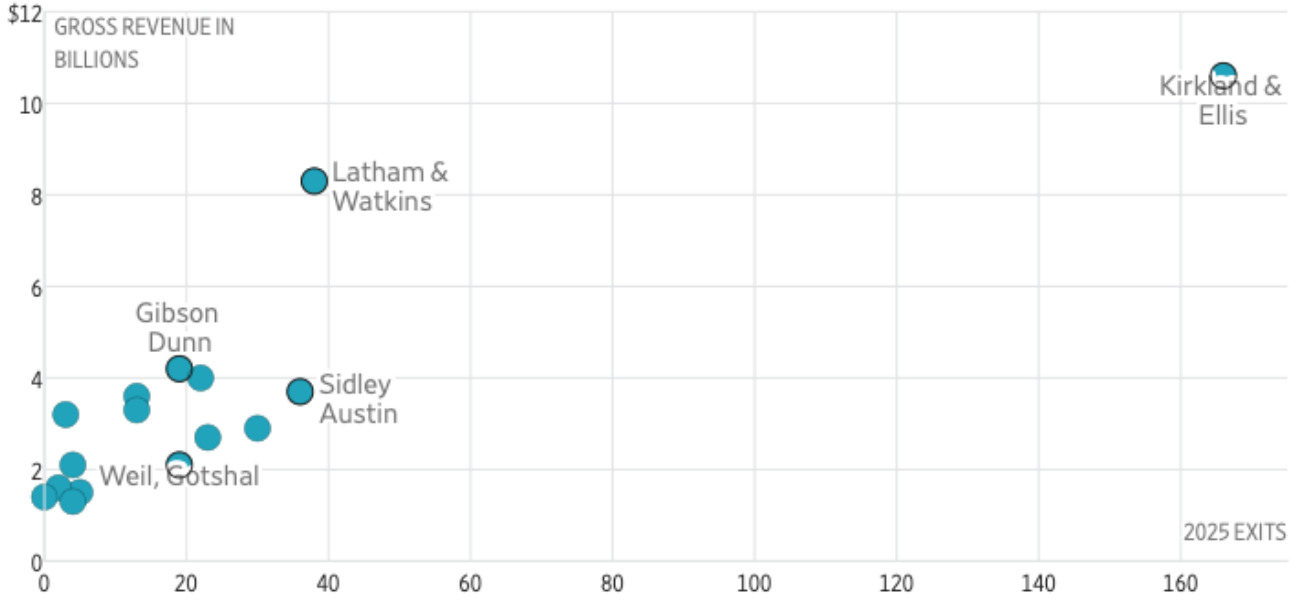




DOWNEY LAW GROUP LLC

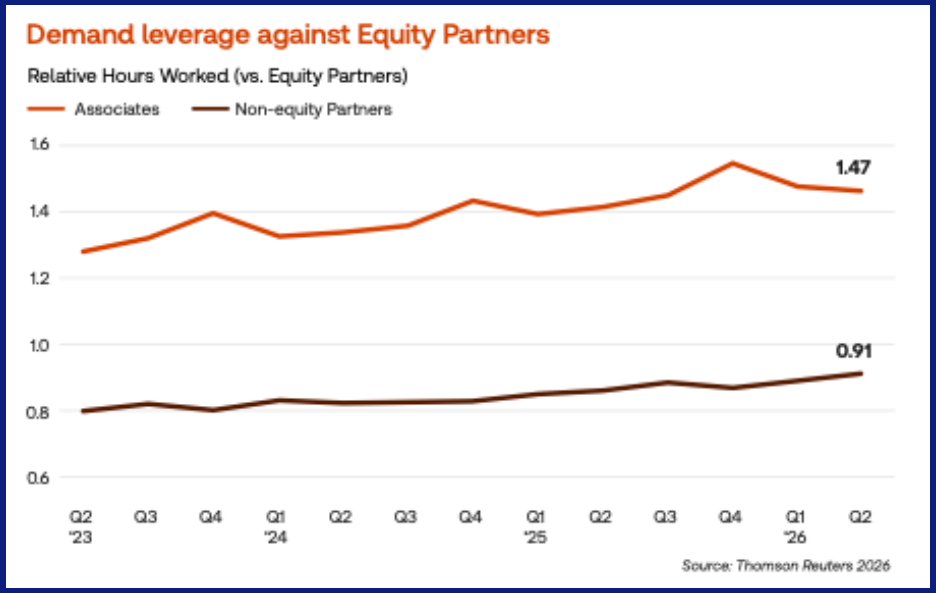
Lone Giant

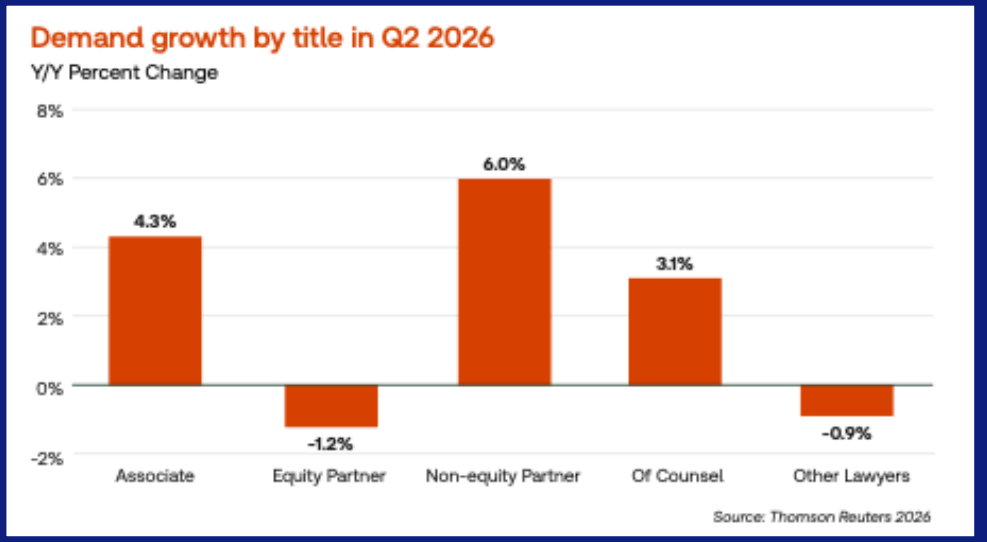
Megafirm Kirkland & Ellis is an outlier in turnover



Source: The American Lawyer; SurePoint

DOWNEY LAW GROUP LLC

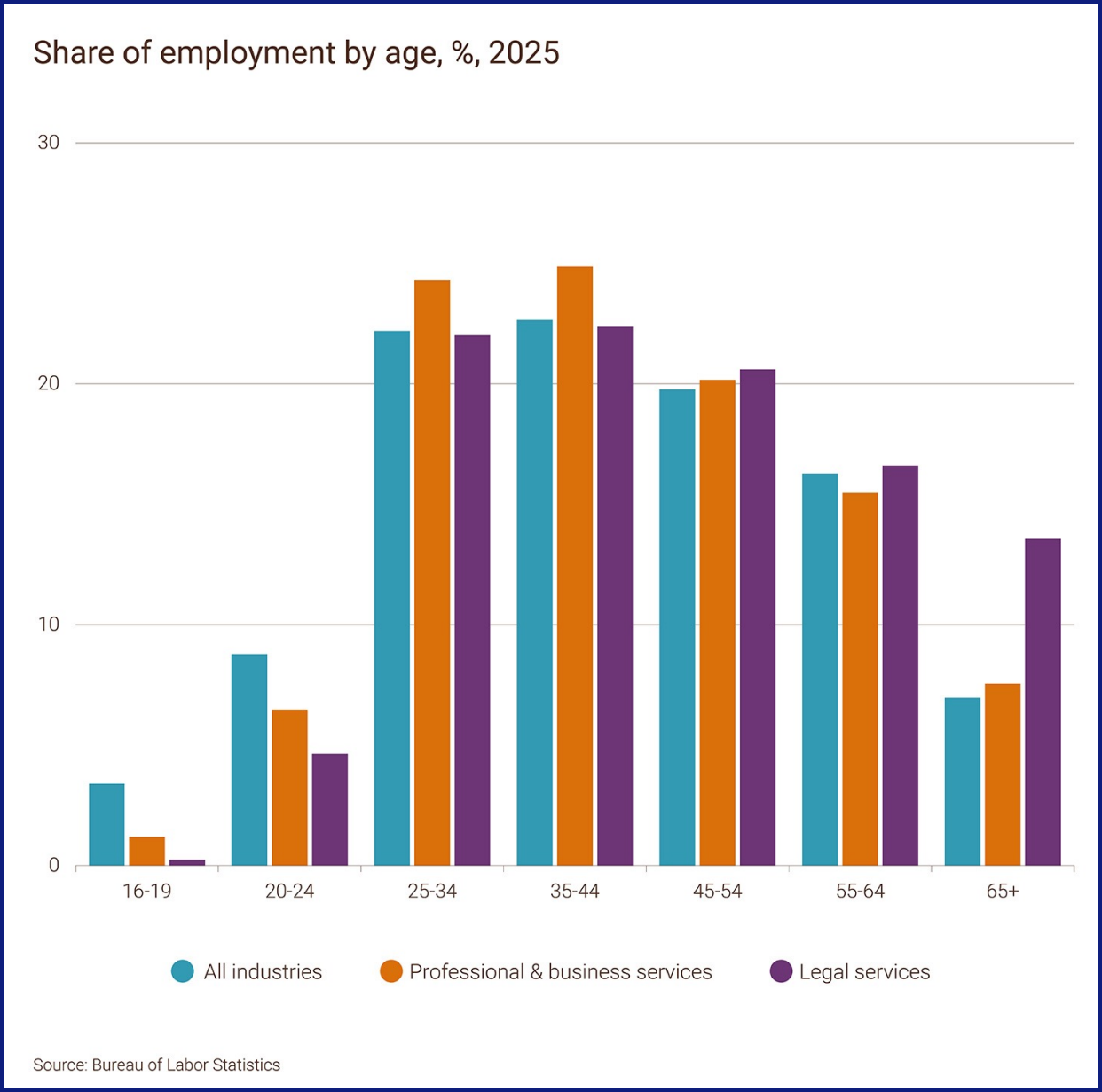




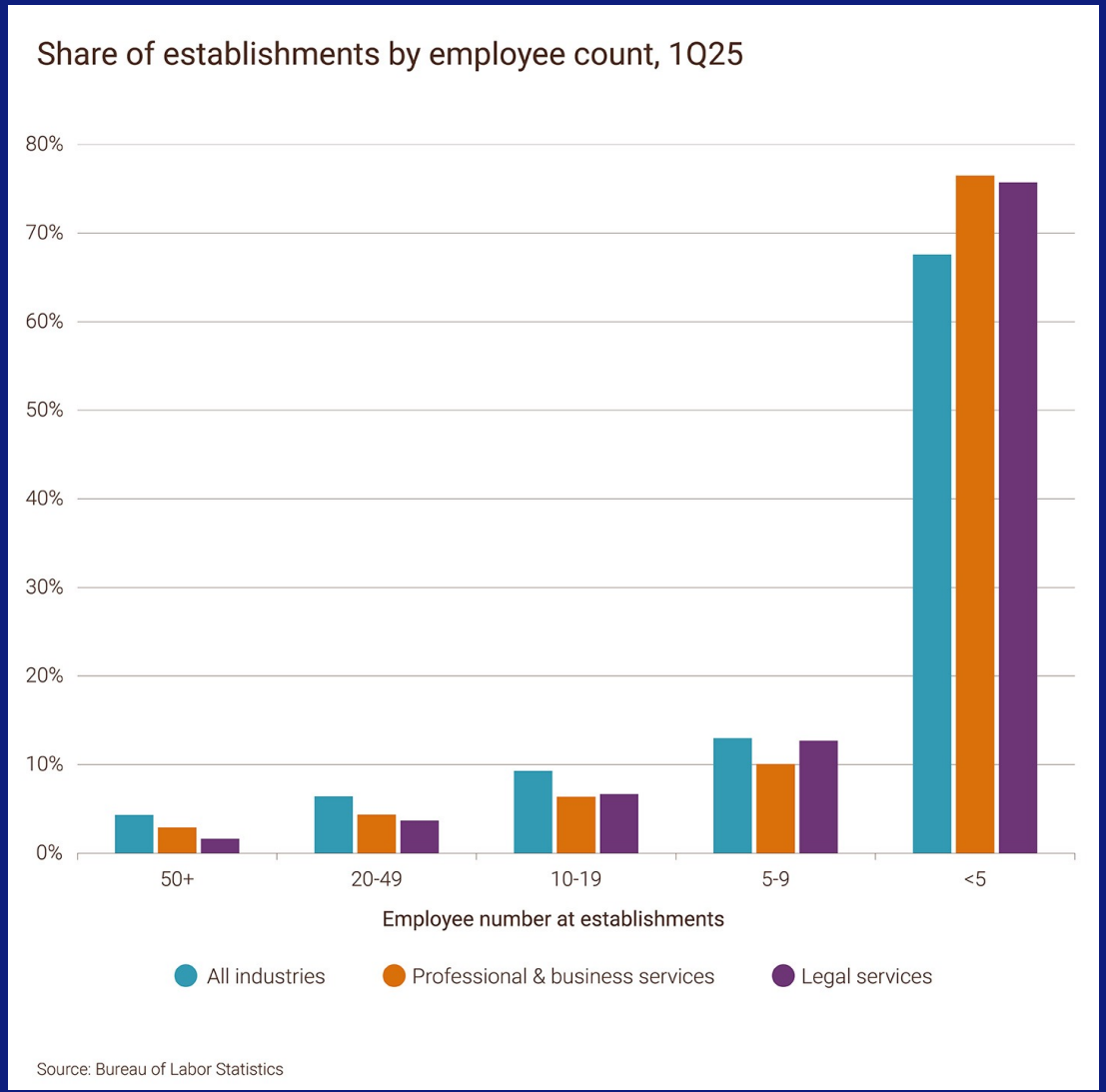
DOWNEY
LAW GROUP LLC



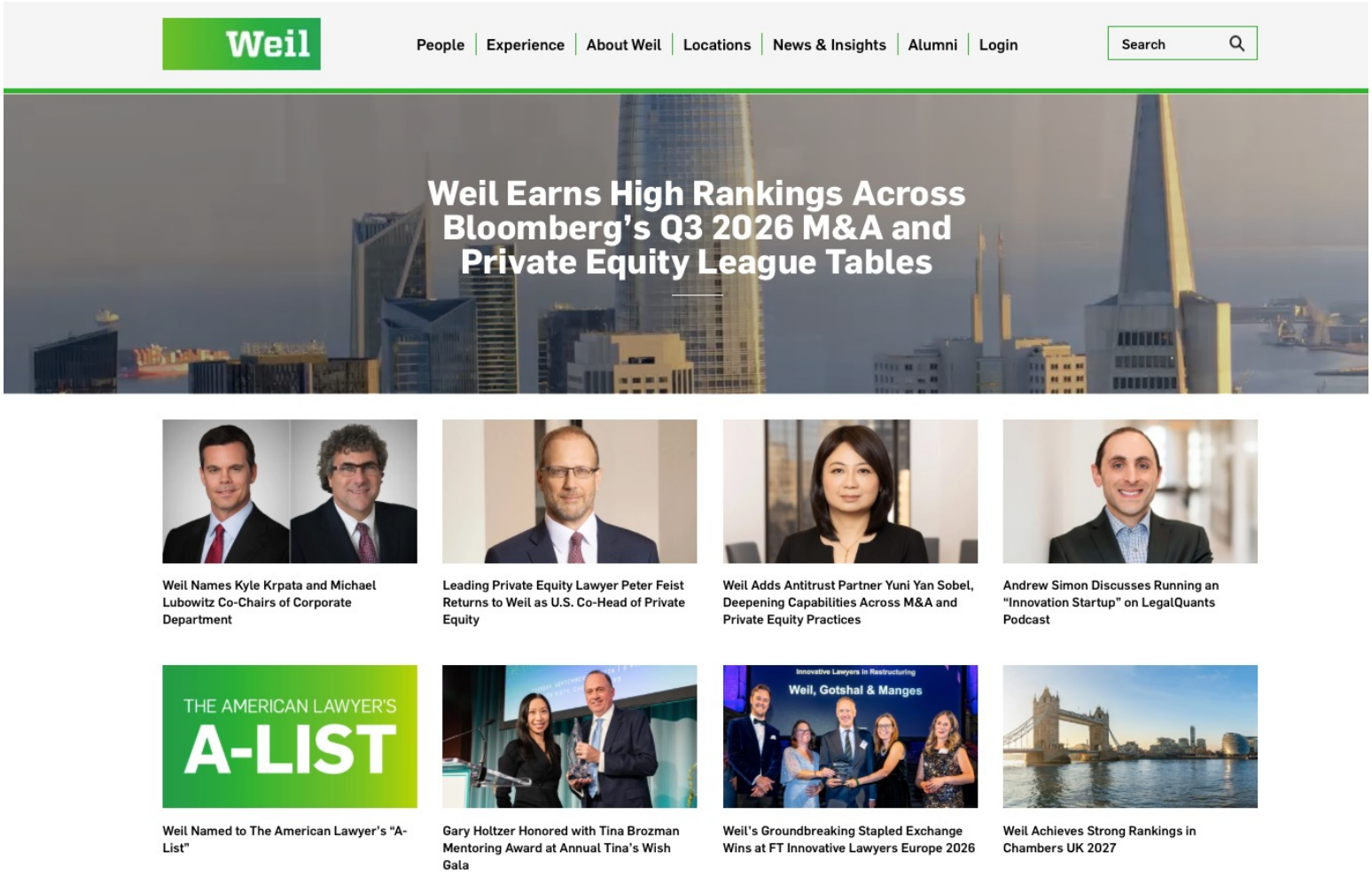
DOWNEY
LAW GROUP LLC



DOWNEY LAW GROUP LLC



DOWNEY
LAW GROUP LLC



With 1200 lawyers on three continents, Weil, Gotshal & Manges LLP has been a preeminent provider of legal services for more than 90 years.

DOWNEY LAW GROUP LLC

The New York Times

Weil Gotshal, Once a Legal Powerhouse, Plans to Dissolve

The prominent law firm has been rocked by an exodus of high-profile lawyers, a failed succession plan and a scuttled deal to merge with a rival firm.

Listen · 8:46 min Share full article 320



Founded nearly a century ago, Weil Gotshal was once the marquee for bankruptcy advice but has more recently had difficulty competing with giant law firms. Andrew Kelly/Reuters

By Lauren Hirsch

Oct. 28, 2026

Weil, Gotshal & Manges, one of Wall Street's most prominent law firms, is preparing to wind down its operations after nearly a century of advising some of America's largest corporations, a stunning collapse that reflects changes roiling the legal industry.

$2B in revenue (#29 in AmLaw 100) – 64% increase over last decade

46% profit margin

$5.59M (#20) profits per equity partner (2025)

16 offices

2200 owners/employees

DOWNEY LAW GROUP LLC

THE BUSINESS MODEL ANALYST

News Analysis Rankings & Data Newsletter About

HOME - NEWS - WEIL'S $20 MILLION PARTNER WALKED. NO LAW FIRM IS ALLOWED TO STOP HIM.

NEWS

Weil's $20 Million Partner Walked. No Law Firm Is Allowed to Stop Him.

POSTED ON SEPTEMBER 14, 2026 BY FLAVIA MOURA

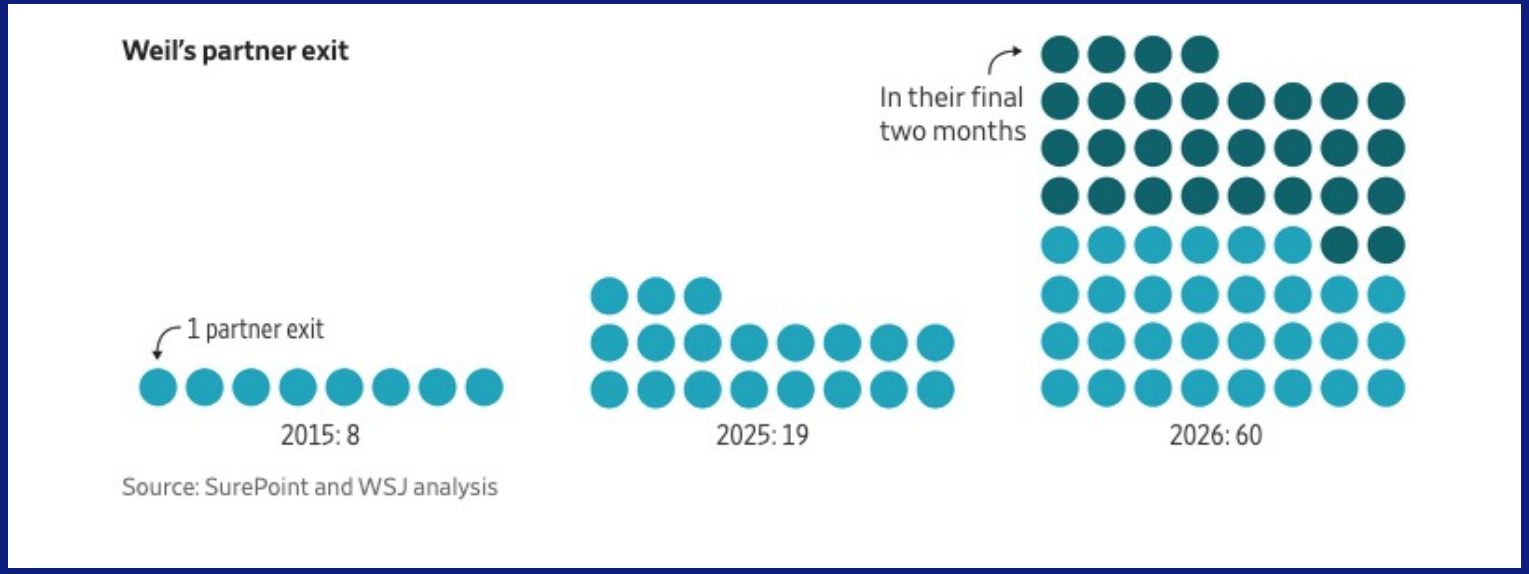


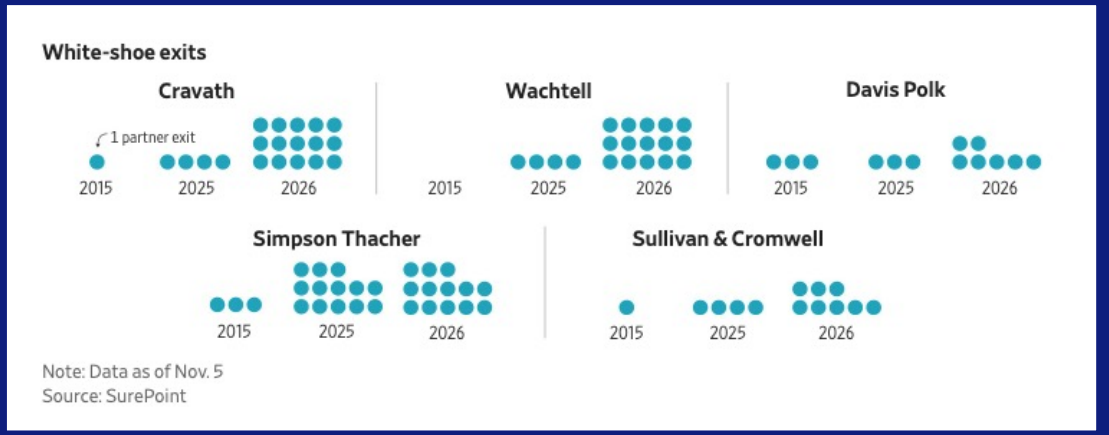
DOWNEY LAW GROUP LLC

What Happened?

- Leadership issues/crisis
  - Barry Wolf was retiring as firm chair
  - Successor Ramona Nee declined position (and left for Kirkland)
  - Michael Aiello – head of the corporate practice (600 lawyers) left for Cravath
- Departures started a “partner run”
- Firm voted on October 28 to wind down effective December 31, 2026

DOWNEY LAW GROUP LLC





DOWNEY LAW GROUP LLC

Private Equity Comes to (for) Law Firms – ABS and MSO

DOWNEY LAW GROUP LLC

Missouri Rule 4-5.4
Professional Independence of a Lawyer

(a) A lawyer or law firm shall not share legal fees with a nonlawyer, except that:

(1) an agreement by a lawyer with the lawyer's firm, partner, or associate may provide for the payment of money, over a reasonable period of time after the lawyer's death, to the lawyer's estate or to one or more specified persons;

(2) a lawyer who undertakes to complete unfinished legal business of a deceased lawyer may pay to the estate of the deceased lawyer that proportion of the total compensation that fairly represents the services rendered by the deceased lawyer;

(3) a lawyer who purchases the practice of a deceased, disabled, or disappeared lawyer may, pursuant to the provisions of Rule 4-1.17, pay to the estate or other representative of that lawyer the agreed-upon purchase price;

(4) a lawyer or law firm may include nonlawyer employees in a compensation or retirement plan, even though the plan is based in whole or in part on a profit-sharing arrangement; and

(5) a lawyer may share court-awarded legal fees with a nonprofit organization that employed, retained, or recommended employment of the lawyer in the matter.

DOWNEY LAW GROUP LLC

Missouri Rule 4-5.4
Professional Independence of a Lawyer

(b) A lawyer shall not form a partnership with a nonlawyer if any of the activities of the partnership consist of the practice of law.

(c) A lawyer shall not permit a person who recommends, employs, or pays the lawyer to render legal services for another to direct or regulate the lawyer's professional judgment in rendering such legal services.

(d) A lawyer shall not practice with or in the form of a professional corporation or association authorized to practice law for a profit if:

(1) a nonlawyer owns any interest therein, except that a fiduciary representative of the estate of a lawyer may hold the stock or interest of the lawyer for a reasonable time during administration;

(2) a nonlawyer is a corporate director or officer thereof or occupies the position of similar responsibility in any form of association other than a corporation; or

(3) a nonlawyer has the right to direct or control the professional judgment of a lawyer.

DOWNEY LAW GROUP LLC

Rule 4-1.2

A lawyer shall abide by a client's decisions concerning the objectives of representation, subject to Rule 4-1.2(c), (f) and (g), and shall consult with the client as to the means by which they are to be pursued.

A lawyer shall abide by a client's decision whether to accept an offer of settlement of a matter.

In a criminal case, the lawyer shall abide by the client's decision, after consultation with the lawyer, as to a plea to be entered, whether to waive jury trial and whether the client will testify.

DOWNEY LAW GROUP LLC

Rule 4-2.1

In representing a client, a lawyer shall exercise independent professional judgment and render candid advice.

In rendering advice, a lawyer may refer not only to law but to other considerations such as moral, economic, social, and political factors that may be relevant to the client's situation.

DOWNEY LAW GROUP LLC

Rule 4-5.6

A lawyer shall not participate in offering or making:

(a) a partnership, shareholders, operating, employment, or other similar type of agreement that restricts the right of a lawyer to practice after termination of the relationship, except an agreement concerning benefits upon retirement

DOWNEY LAW GROUP LLC

Alternative Business Structures

DOWNEY
LAW GROUP LLC

What Is an Alternative Business Structure (ABS)?

- Entity with non-lawyer owners that provides legal services
- Only permitted in AZ, UT, WA, DC, and PR
  - AZ hosts 150 licensed ABS
  - UT had about 35-40 ABS at its peak
    - Number fell when UT Supreme Court restructured to tighten focus on serving underserved and low-income consumers
    - UT “Sandbox” is closed to new applications and sunsets August 14, 2027

DOWNEY LAW GROUP LLC

Regulations of ABS

- CA prohibits fee sharing with ABS entities – Cal. Bus. & Prof. Code 6156(c)
- CO Rev. Stat. § 13-93-401 prohibits ABS and fee sharing with ABS
- 705 ILCS 205/13 imposes limits on ABS (with revenues less than $300M) and firms with MSOs
  - Must disclose MSO relationships
  - Generally may not share fees with ABS

DOWNEY LAW GROUP LLC

Illinois 705 ILCS 205/13

An entity owned, operated, or controlled in whole or in part by persons not licensed as attorneys, including management services organizations, that is involved with a law firm's or attorney's practice may not do any of the following:

(1) interfere with the professional judgment of attorneys in representing clients;

(2) exercise control over or be delegated the power to do any of the following:

(A) to reveal, own, or determine the content of client records or to reveal any attorney-client communications;

(B) to select, hire, or terminate attorneys or allied legal staff; or

(C) to set competency, productivity, or proficiency parameters for attorneys or allied legal staff;

(3) charge any fee to the attorney or law firm that is directly or indirectly based on the attorney's fees, revenues, or profits of the attorney or law firm.

DOWNEY LAW GROUP LLC

Cal. Bus. & Prof. Code 6156

(a) No attorney licensed or otherwise authorized to practice in this state shall share legal fees directly or indirectly with an out-of-state alternative business structure unless all of the following apply:

(1) The attorney is also licensed in the state in which the alternative business structure is approved.

(2) The fees are compensation for the provision of legal services in that state.

(3) The law of that state is controlling pursuant to Rule 8.5 of the California Rules of Professional Conduct or any successor rule.

(b) A violation of this section shall constitute cause for the imposition of discipline by the State Bar of California and shall subject the attorney to the following penalties:

(1) Statutory damages of ten thousand dollars ($10,000) per violation or three times the actual damages incurred by the consumer, whichever is greater.

(2) Attorney's costs and fees.

(3) Injunctive or declaratory relief.

DOWNEY LAW GROUP LLC

Cal. Bus. & Prof. Code 6156 (Continued)

(c)

(1) For the purposes of this section, “alternative business structure” means any entity that provides legal services while allowing nonattorney ownership or decisionmaking authority.

(2) For the purposes of this section, “alternative business structure” does not include nonprofit organizations.

(d) This section shall not apply to any arrangement for the sharing of legal fees if both of the following conditions are satisfied:

(1) The arrangement for the sharing of legal fees was ordered or approved by a court or tribunal of competent jurisdiction, including, but not limited to, the establishment or distribution of a common benefit fund in coordinated, consolidated, or multidistrict litigation.

(2) The manner in which the legal fees are to be allocated is subject to judicial or tribunal oversight and determined to be fair, reasonable, and necessary for the administration of justice.

(e) This section shall not apply to a contract in which all of the following are satisfied:

(1) The contract outlines a specific dollar amount for services rendered.

(2) No payment is related to the referral of legal services or purchase of a lead for a potential client or case.

(3) No payment is contingent on the amount recovered in a specific case.

(f) Nothing in this section shall be construed as superseding the holding in *Ridgley v. Lew* 55 F. Supp. 3d 89 (2014).

(g) This section shall only apply to contracts entered into on or after January 1, 2026.

(h) This section shall remain in effect only until January 1, 2030, and as of that date is repealed.

Colorado § 13-93-404 – Prohibition on nonlawyer ownership and fee sharing with nonlawyers

13-93-404..

(1) A lawyer or law firm shall not, in connection with providing legal services:

(a) Share with, pay to, allocate to, distribute to, or provide any portion of legal fees or revenues, whether gross or net, or any other financial benefit derived from legal services, directly or indirectly, however denominated or structured, to any alternative business structure or nonlawyer, other than lawful wages, salaries, benefits, or discretionary bonuses paid to nonlawyer employees of the law firm for services rendered in the ordinary course of their employment;

(b) Enter into any financial, contractual, ownership, management, marketing, co-counsel, referral, or fee-allocation arrangement with an alternative business structure, which arrangement relates to providing legal services;

(c) Form a partnership, limited liability company, corporation, or other entity recognized under Colorado law with a nonlawyer if any of the activities of the entity consist of providing legal services; or

(d) Practice with or in the form of a professional company that is authorized to provide legal services for profit if:

(I) A nonlawyer owns any interest in the professional company; except that a fiduciary representative of the estate of a lawyer or LLP may hold the stock or interest of the lawyer or LLP for a reasonable time during administration of the estate; or

(II) A nonlawyer has the right to direct or control the professional judgment of a lawyer

DOWNEY LAW GROUP LLC

Colorado § 13-93-404 (Continued)

(2) How a compensation arrangement is characterized does not affect whether this section applies to the compensation arrangement.

(3) Nothing in this section:

(a) Prevents a client from directing the client's lawyer;

(b) Prohibits an arrangement in which all of the following are satisfied:

(I) The contract for the arrangement provides for a specific, predetermined dollar amount for clearly defined legal services;

(II) A payment is not made, directly or indirectly, for the referral of legal services or the purchase of a lead for a potential client or case;

(III) The fee under the arrangement is not contingent upon, tied to, or otherwise dependent on the economic outcome of any matter or the amount recovered and is not adjusted, refunded, credited, or otherwise modified based on the economic outcome or recovery;

(IV) The primary purpose of the arrangement is not the pursuit or recovery of monetary damages on behalf of a client; and

(V) The fee under the arrangement is solely for identified services and is not part of, conditioned upon, or combined with any other arrangement that provides for compensation based on referrals, case outcomes, or the client's recovery; or

(c) Limits or reduces the right of a client or employer of a lawyer to seek and collect or settle a payment on account of a statutory or contractual entitlement to attorney fee reimbursement.

Colorado § 13-93-405 - Restrictions on arrangements with managed services organizations

(1) A lawyer or law firm providing legal services shall not compensate or engage a managed services organization in any manner unless the compensation paid to the managed services organization is not contingent upon or calculated as a percentage of legal fees, revenues, or profits and is not determined by reference to recoveries, settlements, judgment awards, or case outcomes.

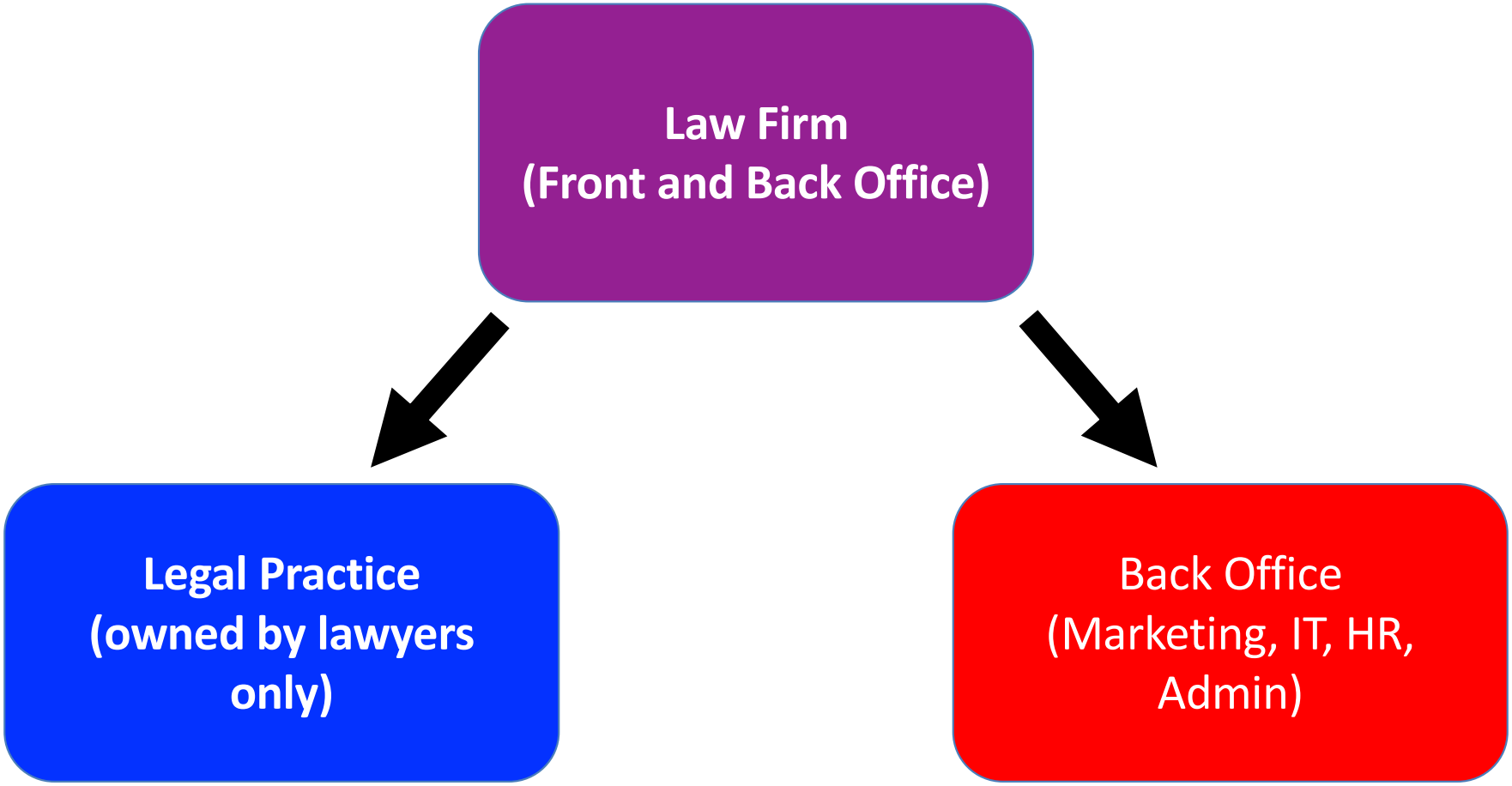
(2) Nothing in this section prohibits compensation, including flat fee or hourly payments, or engagement of managed services organizations that is not expressly prohibited by this section.

DOWNEY LAW GROUP LLC

Management Services Organizations

DOWNEY LAW GROUP LLC

Management Services Organization (MSO) for Law Firms



DOWNEY LAW GROUP LLC

Structure of MSO-Investor Deal

- Investor provides capital to law firm
  - Marketing expenses
  - AI development
- Law firm repays investment over time
  - Fixed monthly charges
  - Per-lawyer or per-user charge
  - Cost-plus pricing

DOWNEY LAW GROUP LLC

Benefits to Law Firm

- Access to capital
- Increase scale of operations
- Partner (owner) liquidity
- Greater lawyer stability – less mobility

DOWNEY LAW GROUP LLC

Steps for Forming MSO

- **Form the MSO.** The firm creates a new company, initially owned by the firm or its partners.
- **Transfer non-legal services assets to MSO.**
  - Brand and trademarks, technology, equipment, leases, and nonlawyer staff move to the MSO
  - Client files, engagement letters, and anything tied to the practice of law stay with the firm.
- **Sign a management services agreement (MSA).** The firm contracts with the MSO for a defined set of services at a defined price. These agreements typically run 10 to 25 years
- **Sell some or all of the MSO.** The most common structure today has the MSO owned partly by an outside investor and partly by the firm's own lawyers.

DOWNEY LAW GROUP LLC

Pricing of MSO

- Multiple of EBITDA (earnings before interest, taxes, depreciation, and amortization)
- Investors evaluate profitability alongside growth, margins, leadership, and future earnings potential.
- Personal injury firms have been increasing in valuation, from 4 to 5x EBITDA two years ago to closer to 6 to 7x now
- Investors want sustainable earnings, predictable revenue, strong operations, and a business that can continue growing beyond its founder.
- A firm dependent on one attorney or a handful of larger cases can be a riskier investment.

DOWNEY LAW GROUP LLC

MSO Sale Usually Decreases Compensation, for Short Term

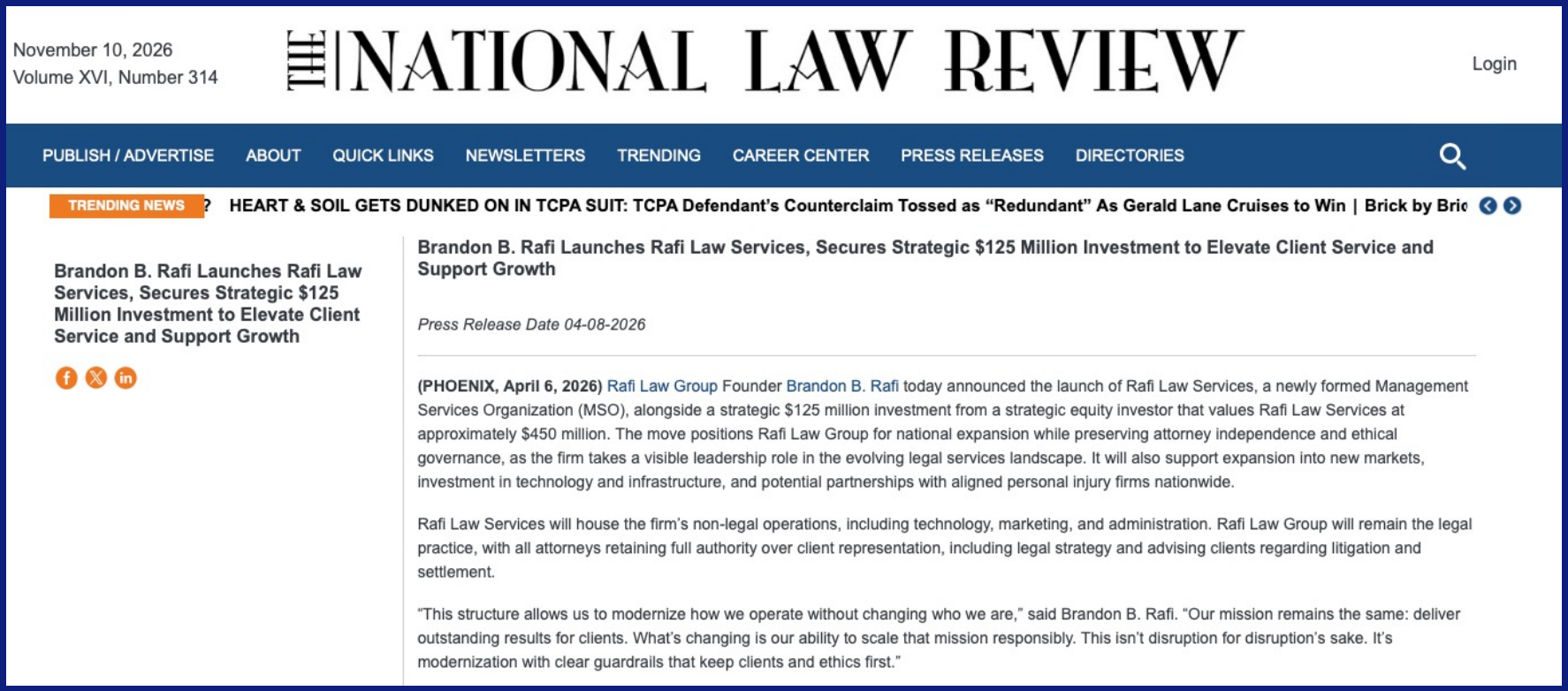
- Portion of law firm profits (partner compensation) are treated as business profits to establish EBITDA
- Owner often receive an upfront payment for some equity ownership of MSO, and also retain an equity interest

DOWNEY LAW GROUP LLC

Appealing Attributes for Investors

- Substantial size of firm (meaningful scale)
- Consistent growth and strong profitability
- Leadership that can move transaction forward, but not too much dependence on one person
- For personal injury firms, case inventory and pipeline

DOWNEY LAW GROUP LLC



November 10, 2026
Volume XVI, Number 314

THE NATIONAL LAW REVIEW

Login

PUBLISH / ADVERTISE ABOUT QUICK LINKS NEWSLETTERS TRENDING CAREER CENTER PRESS RELEASES DIRECTORIES

TRENDING NEWS ? HEART & SOIL GETS DUNKED ON IN TCPA SUIT: TCPA Defendant's Counterclaim Tossed as "Redundant" As Gerald Lane Cruises to Win | Brick by Bric

Brandon B. Rafi Launches Rafi Law Services, Secures Strategic $125 Million Investment to Elevate Client Service and Support Growth

Brandon B. Rafi Launches Rafi Law Services, Secures Strategic $125 Million Investment to Elevate Client Service and Support Growth

Press Release Date 04-08-2026

(PHOENIX, April 6, 2026) Rafi Law Group Founder Brandon B. Rafi today announced the launch of Rafi Law Services, a newly formed Management Services Organization (MSO), alongside a strategic $125 million investment from a strategic equity investor that values Rafi Law Services at approximately $450 million. The move positions Rafi Law Group for national expansion while preserving attorney independence and ethical governance, as the firm takes a visible leadership role in the evolving legal services landscape. It will also support expansion into new markets, investment in technology and infrastructure, and potential partnerships with aligned personal injury firms nationwide.

Rafi Law Services will house the firm's non-legal operations, including technology, marketing, and administration. Rafi Law Group will remain the legal practice, with all attorneys retaining full authority over client representation, including legal strategy and advising clients regarding litigation and settlement.

"This structure allows us to modernize how we operate without changing who we are," said Brandon B. Rafi. "Our mission remains the same: deliver outstanding results for clients. What's changing is our ability to scale that mission responsibly. This isn't disruption for disruption's sake. It's modernization with clear guardrails that keep clients and ethics first."

DOWNEY LAW GROUP LLC

Comparing MSO and ABS

Feature	MSO	ABS (Arizona model)
Where it works	Every U.S. jurisdiction, built correctly	Arizona (license required); limited variants in Utah, D.C., Puerto Rico
What investors own	The management company only	Equity in the law firm itself
Investor returns	Recurring management fee at fair market value	Share of firm profits, including legal fees
Regulatory approval	None required (generally); governed by ethics rules	Arizona Supreme Court license, audits, compliance program
Multi-state reach	Firm practices anywhere it's licensed	ABS generally can't open branches in Rule 5.4 states

DOWNEY LAW GROUP LLC

https://one400.com/blog/law-firm-mso-guide/

Other Options for Law Firms

- PEO – Professional Employer Organization
- Fractional COO/CFO/CMO or HR or bookkeeping

DOWNEY LAW GROUP LLC

ISBA Opinion 97-03

Digest – A corporation doing business as a "management services organization" is engaged in the unauthorized practice of law when, among the services provided, it includes legal services, whether in-court or otherwise; it would be professionally improper for any lawyer to counsel or advise the corporation in rendering such services.

Facts – A corporation described as a "management services organization" provides, by contract with unaffiliated, unrelated entities, various management services for its clients. The corporation's contract stipulates that it will provide certain legal services through its in-house legal staff as part of its overall management services. These services will consist principally of drafting and reviewing contracts, conducting legal research, and handling filings for maintenance of state licensing requirements. The services would not include courtroom appearances or taking or attending depositions.

Questions – Are the contemplated services by the corporation, through its in-house legal staff, as part of its contractual managerial services, in violation of the Illinois Rules of Professional Conduct?

Opinion . . . .

The description of the services to be performed as a part of the management services to the corporation's clients leaves no doubt that they involve the practice of law.

. . . .

The Committee is therefore of the opinion that providing legal services in the manner described constitutes the unauthorized practice of law and that a lawyer who assists in such endeavor violates Rule 5.5 of the Rules of Professional Conduct.

DOWNEY LAW GROUP LLC

Illinois 705 ILCS 205/13

An entity owned, operated, or controlled in whole or in part by persons not licensed as attorneys, including management services organizations, that is involved with a law firm's or attorney's practice may not do any of the following:

(1) interfere with the professional judgment of attorneys in representing clients;

(2) exercise control over or be delegated the power to do any of the following:

(A) to reveal, own, or determine the content of client records or to reveal any attorney-client communications;

(B) to select, hire, or terminate attorneys or allied legal staff; or

(C) to set competency, productivity, or proficiency parameters for attorneys or allied legal staff;

(3) charge any fee to the attorney or law firm that is directly or indirectly based on the attorney's fees, revenues, or profits of the attorney or law firm.

DOWNEY LAW GROUP LLC

Colorado § 13-93-405 - Restrictions on arrangements with managed services organizations

(1) A lawyer or law firm providing legal services shall not compensate or engage a managed services organization in any manner unless the compensation paid to the managed services organization is not contingent upon or calculated as a percentage of legal fees, revenues, or profits and is not determined by reference to recoveries, settlements, judgment awards, or case outcomes.

(2) Nothing in this section prohibits compensation, including flat fee or hourly payments, or engagement of managed services organizations that is not expressly prohibited by this section.

DOWNEY LAW GROUP LLC

Private Equity and Health Care (from Google Gemini)

Private equity (PE) firms buy medical practices and hospitals to make short-term profits over a typical 3-to-7-year window, a business model that frequently leads to higher patient costs, reduced care quality, and financial instability. National Institutes of Health (NIH). Core problems include

• ***Lower Care Quality and Safety***: Studies (such as a Harvard Medical School analysis in the JAMA Network) show that PE-acquired hospitals experience significant increases in hospital-acquired complications (25%), patient falls (27%), and central line-associated bloodstream infections (38%). Harvard Medical School

• ***High Debt and Bankruptcies***: PE firms use leveraged buyouts (LBOs)—funding acquisitions with heavy debt placed onto the hospital or practice itself. This debt load triggers bankruptcies (e.g., Steward Health and Hahnemann Hospital closures) and forces cutbacks. Stanford Law Review

• ***Asset Stripping and Real Estate Sales***: Firms often engage in "sale-leaseback" transactions, selling off physical hospital or clinic real estate to third-party investors and forcing the medical facility to pay high ongoing rent, draining operational cash. Georgetown Law

• ***Higher Prices and Market Consolidation***: PE roll-ups buy out competing regional practices or form Management Services Organizations (MSOs) to sidestep corporate practice of medicine laws. This eliminates local competition and drives up prices for patients and insurers by an average of roughly 20%. Center for American Progress

• ***Staff Cuts and Lower-Skilled Labor***: To boost profit margins quickly, facilities often reduce nurse and physician staffing levels, cut staff pay/benefits, or replace experienced doctors with lower-cost, less-skilled mid-level providers bound by non-compete agreements. National Institutes of Health (NIH)

• ***Loss of Physician Autonomy***: Doctors often transition from independent practice owners to corporate employees, facing heavy administrative burdens, strict productivity quotas, and a loss of control over clinical decision-making. Commonwealth Fund

Conclusory Matters

Questions – If you have questions after the program, please email them to Paige Tungate at ptungate@DowneyLawGroup.com

Post-Program Survey – A survey will be emailed to you about 30 minutes after this program. Also, here is the survey link:

https://www.surveymonkey.com/r/mso1126

Certificate of Completion – Available through the Post-Program Survey

Kansas Credit – If you are seeking Kansas credit, you need to enter the two Attendance Verification Words and your Kansas information into the Post-Program Survey. *Please complete this information in the survey this week (if possible), so we can ensure you receive proper credit*

DOWNEY LAW GROUP LLC



https://www.surveymonkey.com/r/mso1126

DOWNEY
LAW GROUP LLC

Future Programs

December 2, 2026 – Wednesday at 12:00 Noon CT - **Managing Your Lawyer Trust Account**

December 17, 2026 – Thursday at 12:00 Noon CT - **Legal Ethics and Dealing with Non-Clients - the "Chapter 4" Rules**

January 6, 2027 - Wednesday at 12:00 Noon CT- **Legal Ethics Update 2027 - Part 1** - 1.0 Ethics CLE

January 21, 2027 - Thursday at 12:00 Noon CT - **Encouraging Inclusivity Through Mentoring** - 1.0 Ethics and Anti-Bias CLE

February 2, 2027 - Tuesday at 3:00 PM CT - **The Attorney-Client Privilege** - 1.0 Ethics CLE

February 17, 2027 - Wednesday at 12:00 Noon CT - **Legal Ethics and Attorney Billing** - 1.0 Ethics

March 4, 2027 - Thursday at 12:00 Noon CT - **Encouraging Inclusivity Through Mentoring** - 1.0 Ethics and Anti-Bias CLE

March 17, 2027 - Wednesday at 12:00 Noon CT - **Legal Ethics and Technology 2027** - 1.0 Ethics CLE

DOWNEY LAW GROUP LLC

www.DowneyEthicsCLE.com

Timed Agenda

12:00-05 Introduction

12:05-55 Discuss the legal ethics rules that regulate new business models, including management services operations

DOWNEY LAW GROUP LLC

Thank you

DOWNEY
LAW GROUP LLC

Downey Law Group LLC
(314) 961-6644
(844) 961-6644 toll free
info@DowneyLawGroup.com



https://www.surveymonkey.com/r/mso1126

DOWNEY
LAW GROUP LLC