

The Canadian Institute's

# Effective LPO Implementation & Management Strategies to

# REDUCE LEGAL COSTS

Enhance Efficiency • Increase Flexibility

Maximize Profitability • Augment Competitive Edge

## CHAIR:

Jim Middlemiss  
Editor  
Legal Post Section of Financial Post

## OUTSTANDING SEASONED SPEAKER FACULTY INCLUDES:

Gavin Birer  
Lawyer and Founder  
Legalwise

Hilary Clarke  
Partner  
McMillan LLP

Cindy Cross  
VP & General Counsel  
Travelers Global Business Payments

Carla Swansburg  
Senior Counsel  
RBC Financial Group

PLUS! Gain additional invaluable skills by attending the mid-conference early-riser workshop session on **February 19, 2010**

**Demystifying the Complexity of Structuring, Drafting, Implementing and Negotiating Outsourcing Agreements – A Guide to Success!**

## GAIN THE COMPETITIVE ADVANTAGE!

### Take Back to the Office

- ADVANCED, LPO-specific post-contract administration tips and dispute resolution techniques
- STRATEGIES to protect against potential ethical dilemmas
- BEST PRACTICES on exploiting the LPO benefits and successfully confronting the challenges

## TOPICS TO BE COVERED

- Examining the adequacy of the Canadian regulatory framework
- Getting up to speed on latest LPO trends and developments: making an informed decision
- Gaining insight into the various pricing and governance models: selecting the right one for you
- Remaining competitive in the Canadian Legal Market: Maximizing efficiency. Reducing costs.

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See inside for details



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# Come Find Out If LPO Is Right For YOU!

Despite growing enthusiasm in the Canadian market, there has been resistance towards Legal Process Outsourcing (LPO). The current economic circumstances, however, are causing a push towards increased efficiency and cost-reduction within legal departments and law firms, not only across the country, but worldwide. LPOs can provide both law firms and legal departments with a viable option for better-allocated resources, cost-reduction and enhanced overall efficiencies. **BUT, is it right for you?**

**The Canadian Institute** has developed this brand new conference to help you get the answers you need. Critically assess the benefits and weigh them against the risks, challenges and possible impediments of LPO. Leave with valuable information, expert knowledge and latest insights that will give you the advantageous ability to help make an informed decision as to whether LPO is right for your in-house corporate legal department, law firm or financial institution legal department. Law firms: attend to learn if and how you can construct and implement an LPO arrangement that will better allow you to meet the needs of your clients. Be responsive to their needs.

Whether you are in-house or part of a private practice firm (small or large), whether you are only just beginning to contemplate legal outsourcing or already have an outsourcing arrangement in place – **you cannot afford to skip this event.**

The **Canadian Institute's Effective LPO Implementation &**

**Management Strategies to REDUCE LEGAL COSTS** will provide you with the critical information you need to make a decision as to whether to enter into an LPO arrangement. **PLUS!! Learn how to structure and execute an LPO arrangement as well as how to manage an already-existing one** by obtaining tips, strategies and best practices from the experts. This is a **MUST-ATTEND** event. **GAIN THE COMPETITIVE ADVANTAGE.**

Don't wait until you find yourself struggling to compete within the rapidly-evolving global market. Obtain the knowledge now. Review your alternatives today. Make a decision quickly...before it's too late.

Add **the very best value** to your attendance: obtain take-home techniques & practical strategies on constructing outsourcing agreements and get tips on drafting, reviewing, negotiating and terminating outsourcing agreements by attending our mid-conference early-riser workshop session: **"Demystifying the Complexity of Structuring, Drafting, Implementing and Negotiating Outsourcing Agreements – A Guide to Success."**

Register now by calling toll-free 1-877-927-7936 or online at [www.canadianinstitute.com/LPO](http://www.canadianinstitute.com/LPO).

Book your place now before all the spaces are secured by your competitors. We'll see you in February!

## WHO SHOULD ATTEND

- In-house Counsel/Managing Counsel
- Law Firm Executive
- General Counsel/Deputy General Counsel/Assistant General Counsel
- Outside Counsel
- COO/CFO of Corporate Legal Departments
- Corporate Heads (Executive Directors, Finance Directors, Managing Directors, Controllers, Analysts)
- Private Practice Counsel specializing in: M&A, Intellectual Property, Patent Litigation, Legal Process Outsourcing
- Law Firm Managing Partners
- VPs & Directors of Outsourcing
- LPOs
- LPO Consulting Firms
- Regulators (LSUC, OSFI, Government)
- Financial Institutions (CFO, In House Counsel, General Counsel, Analyst)
- LawPro Representatives

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Maximize your organization's visibility in front of key decision-makers in your target market. For more information, contact Business Development Executive **Andrew Thompson** at 416-927-0718 ext. 232, toll-free 1-877-927-0718 ext. 232 or by email at [a.thompson@CanadianInstitute.com](mailto:a.thompson@CanadianInstitute.com)

## SPEAKER FACULTY

### CHAIR

**Jim Middlemiss**  
Editor, Legal Post Section of Financial Post

### SPEAKERS

**Joshua Auslander**  
CFO  
Consumer MT Inc.

**Gavin Birer**  
Lawyer and Founder  
Legalwise

**Hilary Clarke**  
Partner  
McMillan LLP

**Rohit Kochhar**  
Founder & Co-Chairman  
LexEdge

**Cindy Cross**  
VP & General Counsel  
Travel Global Business Payments

**Allan C. Hutchinson**  
Professor  
Osgoode Hall Law School

**Kelly Inglese**  
Managing Director  
Platinum Legal Group

**Joe Milstone**  
Co-Founder  
Cognition LLP

**Carla Swansburg**  
Senior Counsel  
RBC Financial Group  
President  
Association of Corporate Counsel's  
Ontario Chapter

**Stephen Taran**  
President  
TVA | The Legal Outsourcing  
Network

**Tamara Vanmeggelen**  
Senior Counsel, Law Group  
Royal Bank of Canada

**Manish Vig**  
Managing Director, Vice-President  
Strategy & Operations  
LexEdge

**Gary M. Zeiss, Esq.**  
Vice President of Corporate  
Transactional Group  
LawScribe, Inc.

Register at 1-877-927-7936 or in Toronto 416-927-7936 or [www.CanadianInstitute.com/LPO](http://www.CanadianInstitute.com/LPO)

8:15 **Registration Opens – Coffee Served**

9:00 **Opening Remarks from the Chair**

**Jim Middlemiss**  
Editor  
Legal Post Section of Financial Post

9:15 **Outsourcing Mechanics: The What's, How's and Why's! Bringing You Up to Speed on Trends and Developments**

**Gavin Birer**  
Lawyer and Founder  
Legalwise

**Jim Middlemiss**  
Editor  
Legal Post Section of Financial Post

**Joe Milstone**  
Co-Founder  
Cognition LLP

*The delivery of legal services is in a state of flux! Clients and legal departments are demanding greater value, billing transparency, flexible billing arrangements and innovative alternatives. Although it's still in its nascent stages, LPO is grounding itself in the shifting Canadian market. This increasingly attractive option provides law firms and corporations with a way in which to reduce costs with improved efficiency and productivity; and yet many are still turning a blind eye to it. Law firms that fail to construct and implement an LPO arrangement may soon find themselves struggling to compete within the rapidly-evolving global marketplace. Legal departments that fail to do so may find themselves overwhelmed, over-budget or both. Uncover novel ideas, review the alternatives and learn how to implement them successfully. This session will provide a macro-analysis on the latest outsourcing trends and help you decide whether outsourcing is right for you.*

- Surfacing trends of LPO: globally and within Canada
  - Is this a fad or a new reality?
  - Anticipating the impacts & obstacles of LPO and gearing up to overcome them successfully
  - Identifying new trends and emerging developments
- Identifying the types of legal services being outsourced and by whom
  - Size and length of the projects
- The A to Z of LPO: understanding the mechanics of LPO
  - How does it all work?
  - Tips, traps & trends!!
- Weighing the advantages and disadvantages
  - From a law firm perspective
  - From a corporate perspective
- Investigating the value proposition for LPO
  - Examining the actual/projected cost savings
  - Identifying revenue growth
  - Quantifying the firm/company ability to better allocate resources

- Remaining competitive in an ever more economically-susceptible market
- Deciding if outsourcing is right for you
- Working with your client/law firm
  - Law Firms: What are your client's expectations? Are you taking adequate action?
  - Clients: How is your law firm responding? Is it servicing your needs? What opportunities exist?
- Outsourcing Models: exploring the similarities and differences. Looking at the pros and cons of each.
  - Outsourcing the corporate counsel/in-house functions in whole or in part
  - Comparing nearshoring against offshoring
- Selecting and implementing the right model
  - Comparing: associated costs, transition & implementation procedures, timelines and potential tax implications
  - Determining which outsourcing model is appropriate for which service
- Learning about what can/can't be outsourced and why
- The RFP Process: when/if this ought to be used?
  - Pros/cons of this process
  - Structuring the RFP to obtain what you are asking for
    - Proposed terms and conditions
    - Security parameters
    - Requirements
    - Service quote
  - Comparing one proposal against another
    - Avoid comparing apples to oranges
    - Identifying a service provider's strategy and short/long-term business objectives
  - Choosing the right fit! Consider:
    - Labour supply; Cost savings; Cultural differences; Regulatory inconsistencies; Requisite expertise; Quality of work product and results
- E-Discovery
  - What is it and how does it work?
  - The advantages and disadvantages of it
  - Transition and implementation
  - Does outsourcing facilitate the e-discovery process?

10:30 **Networking Coffee Break**

10:45 **Protecting Against Ethical Dilemmas that Surface with LPO**

**Alan C. Hutchinson**  
Professor  
Osgoode Hall Law School

- Delving into the ethical concerns of LPO arrangements
- Gauging and ensuring adequate supervision
  - Monitoring someone in another country
- Unauthorized practice of law
  - Malpractice risks and liability issues



This program has been accredited by the Law Society of Upper Canada towards the professional development requirement for certification.

Corporate & Commercial Law	Conference 11 hours	Workshop 2 hours
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- Confidentiality and privacy issues
  - Solicitor-client privilege
  - Meeting disclosure and confidentiality obligations
  - Implementing processes to protect sensitive information and minimize breaches
    - Data encryption and disaster recovery
  - Privacy Laws:
    - Dealing with differing and potentially conflicting privacy laws
    - Confronting the issues and challenges
- Identifying and protecting against conflicts of interest
- Billing transparency issues: why this is a concern
- Properly advising your client
  - Clarifying your clients' needs and expectations
  - Making your client aware of the LPO arrangement
  - Explaining the arrangement and obtaining consent

11:45 **Networking Luncheon for Delegates & Speakers**

1:00 **The Regulatory Framework: Adequate or Absent? Circumventing Liability**

Alan C. Hutchinson  
Professor  
Osgoode Hall Law School

*When working across various jurisdictions it is imperative that you understand what the protections, challenges and risks are. Whether you are a financial institution, a law firm or a corporate legal department outsourcing legal work, you need to know whether the Canadian regulations are adequate.*

- Reviewing regulations: are they adequate?
  - Is the public adequately protected?
  - Adequately policing the outsourced lawyer
  - Best practices on how to adequately protect your client/company
- How do Canadian regulations fit within the regulatory framework of the outsourced jurisdictions?
  - Understanding the legal and regulatory system for outsourced legal services in India
  - Dealing with cross-jurisdictional issues + conflicts
- Lawyers: understanding your professional liability
  - Identifying when outsourced work entails the unauthorized practice of law
  - Understanding the liability concerns
  - Issues surrounding enforcement
- Lawyers: maintaining your own ethical responsibility
  - Complying with the *Rules of Professional Conduct*
  - Recognizing ethical stance of the outsourced lawyer
- Understanding the OSFI Expectations
  - Navigating the B10 Regulation
  - Confronting the challenges
  - Ensuring compliance

2:00 **Networking Coffee Break**

2:15

**COST-BENEFIT ANALYSIS: Review the Benefits. Confront the Challenges. Navigate the Impediments. Protect Against the Risks.**

CASE STUDY

Rohit Kochhar  
Founder & Co-Chairman  
LexEdge

Stephen Taran  
President  
TVA | The Legal Outsourcing Network

*The benefits of outsourcing legal work can be tremendous. However, one cannot fully take advantage of the benefits without understanding the challenges and risks of the process. During this session, experienced onshore and offshore LPO professionals will lead you through a case study and teach you to exploit the benefits while protecting against the risks.*

**The Advantages of Offshore vs Onshore LPO**

- Cost savings: fractional costs
- Increased efficiency: 24/7 resources
- Advanced quality assurance: skilled professionals

**Challenges/Risks of India LPO vs Onshore LPO**

- Maintaining client confidentiality
- Ensuring service provider has requisite expertise
- Regulatory scrutiny under varying privacy laws
- High attrition: Inconsistent service provider
- Conflicts of interest and ethical considerations
- Inconsistency in work quality
- Performance issues when delegating work
- Monitoring/controlling issues
- Risk management and risk allocation

**Can a corporation or law firm successfully implement an LPO arrangement? Is it worth it? Is the choice right for you?**

- Understand your business goals and requirements
- What are your outsourcing needs?
- Define your client's needs and expectations
- Relay consistent requirements and expectations to various LPO providers when obtaining price quotes
- Review resumes and compare several service providers
  - Due diligence: reviewing reputation, insurance, information protection and financial viability
  - Picking the right service provider
- Weighing the pros and cons. Making a decision.
- Clearly identify assignments and deadlines
- Assign a legal project leader to liaise between and monitor the Canadian firm/legal department and the LPO provider
- Install review, audit and assessment mechanisms for appropriate checks and balances

3:30

## Understanding the Various Pricing Models and Selecting the Best One for You

Kelly Inglese  
Managing Director  
Platinum Legal Group

Manish Vig  
Managing Director  
LexEdge

- Importance of selecting the right pricing model
- Considering the various pricing models
  - What are the rate structures in place?
  - Advantages/disadvantages of each
  - Does a higher rate guarantee higher quality
- Are there any hidden costs to consider when outsourcing?
- Benchmarking the costs for the larger scale projects
- Gauging the fair market value of the outsourced work
- Selecting the best pricing model for you

4:45

## Chair's Recap – Conference Adjourns

- Structuring the confidentiality and non-disclosure agreements to uphold ethical standards
- Ensuring that IP rights are protected
- Be mindful of the agreement context
- Reviewing and renewing agreements already in place
- Negotiating tips and traps to avoid
- Ability to adapt: draft to allow for revisions to deal with inadequacies or new developments if necessary
- Remedies for breach: build them into the contract
- Drafting termination options into the contract

### Skills you will take back to your work environment:

- Take-away strategies on effectively and persuasively drafting an LPO agreement
- Implementation techniques for a smooth transaction
- Improved negotiation techniques: things to keep in mind when sealing a deal across jurisdictions
- Facilitating a healthy negotiation; obtaining a win win result

*Don't miss out on these invaluable expert techniques that will give you the leading edge on creating the very best LPO arrangement: facilitating a long-term relationship, a competitive edge and permanently preeminent results!*

## MID-CONFERENCE | EARLY-RISER WORKSHOP SESSION FEBRUARY 19, 2010 | 7:30 a.m. to 10:00 a.m.

### Demystifying the Complexity of Structuring, Drafting, Implementing and Negotiating Outsourcing Agreements – A Guide to Success

Gary M. Zeiss, Esq.  
Vice President of Corporate Transactional Group  
LawScribe, Inc.

*The implementation agreement for the LPO arrangement is the key to success and protecting against risks and liabilities. Before you attend on day two of the conference, make the most of your learning experience by coming and obtaining hands-on training on LPO agreements. LPO arrangements have been likened to M&A transactions – the difference being that LPO arrangements are longer-lasting. With so much LPO providers, law firms, in house counsel and LPO consultants... this session will provide you with great templates, key tips and leading techniques for fostering a manageable and healthy relationship between the various parties involved.*

- Pre-contract considerations
- Drafting tips: what to include in the agreement
- Structuring the outsourcing deal to meet your needs for client confidentiality, quality of work project and risk management
  - What the agreement must allow for:
    - Include provisions that will allow you the right to audit
    - Constructing a plan for knowledge transfer and drafting provisions; ensuring transfer is completed
  - Considerations for the various agreements

## DAY TWO | FEBRUARY 19, 2010

9:45 **Coffee Served**

10:15 **Opening Remarks from the Chair**

10:30 **Post-Contract Administration and Dispute Resolution**

Gary M. Zeiss, Esq.  
Vice President of Corporate Transactional Group  
LawScribe, Inc.

- Conflicts that may arise
  - Contract interpretation
  - Contract revisions
  - Mismanagement of outsourcing transactions
- Dispute Resolution Techniques
  - Enforcing your commercial rights overseas
- Establishing dispute resolution processes early in the game
- Having an Exit Strategy before you go in
- Coping with everyday issues
- Resolving tense situations while avoiding service interruption
- Termination Decisions
  - Deciding whether client/firm should repatriate or move to another service provider
  - Establish a contingency plan to protect confidential information if relationship ends badly

11:30 **Networking Coffee Break**

11:45

## Get it Right! Proper Governance Model and Ongoing Management AFTER the Contract is Signed

**Rohit Kochhar**  
Founder & Co-Chairman  
LexEdge

**Carla Swansburg**  
Senior Counsel  
RBC Financial Group  
President  
Association of Corporate Counsel's Ontario Chapter

- Reviewing the various governance model options and selecting the one that's right for you and your client
- Creating a training program
- Techniques for monitoring, assessing and auditing the LPO arrangement
  - Establishing a line of communication to guarantee efficient information exchange
  - Establish a system to monitor quality of work that allows for necessary improvements when needed
  - Establish a process of accountability
- Benchmarking and its alternatives
- Best practices for day-to-day administration: real examples that have worked
- Reviewing governance and management experiences that have and haven't been successful

12:45

## Networking Luncheon for Delegates & Speakers

2:00

## Winning Strategies to Help Ensure Quality

**Hilary Clarke**  
Partner  
McMillan LLP

- Understanding the real needs of your client or your organization
- Identifying the scope of the work to be outsourced
- Ensuring client retains appropriate expertise while the work is outsourced by implementing a framework to control and mitigate the risks
- Managing quality and exercising control with remote outsourced functions: logistics of file management
- Should lawyer rely on the final product delivered from the outsourced service provider?
  - Adequately advising your client

3:00

## Networking Coffee Break

3:15

## Outsourcing Specific Legal Services: What's Worked? What Hasn't?

**Gavin Birer**  
Lawyer and Founder  
Legalwise

**Tamara Vanmeggelen**  
Senior Counsel, Law Group  
Royal Bank of Canada

**Cindy Cross**  
VP & General Counsel  
Travelex Global Business Payments

CASE STUDY

**Joshua Auslander**  
CFO  
Consumer MT Inc.

*Experienced experts in LPO are limited in the Canadian arena. Given that this is still a very new area, there is no greater source than to hear from the industry experts – those with real experience.*

- What legal processes can feasibly be outsourced efficiently?
- Outsourcing in chunks vs outsourcing an entire legal department/practice area
- Identifying the specific types of legal work that can be outsourced
  - Corporate work: due diligence, corporate governance, public disclosure, regulatory compliance and submissions
  - M&A, financings, shareholder agreements and arrangements
  - IP: patent drafting, analysis and litigation
  - Litigation: research, document review, due diligence
  - Commercial In-House Work: contracts, licensing, employment, distribution and joint venture agreements, procurement, marketing and advertising
- Analysis of which areas achieve the greatest levels of efficiency, cost savings and value-add
  - What services are worth outsourcing and why?
  - What's worked? What hasn't?

4:30

## Alternative Fee Structures and Cost-Saving Strategies: The New Frontier

**Joshua Auslander**  
CFO  
Consumer MT Inc.

**Joe Milstone**  
Co-Founder  
Cognition LLP

*Whether you are moving ahead with LPO or not, the incessant demand for cost-reduction and better value is loud and clear! Are billable hours approaching extinction? Corporate Counsel: You already know what you want: more inside resources that fit within your headcount and budget and reduced legal costs on the outside. Come find out about alternative billing and how to put it to work for you. Private Practice Counsel: Alternative billing and outsourcing could provide you with opportunities to maximize your profitability and delegate repetitive, low-level work while increasing flexibility and focusing your efforts on key tasks that really require your time and attention. The sharpest law firms will get ahead of the game by listening and responding to the needs of their clients. Come find out how to put alternative billing to work for your firm and your clients.*

- Billing transparency issues: over-billing
- Padding problems
  - "Piling On"
  - Treatment of expenses and disbursements
  - Perception issues
- Project management techniques

- Establishing adequate legal budgets that will allow for lower costs but maintain highest-quality work
- Reworking the business model
- Alternative Fee Structures
  - What do you want from your law firm?
  - Understanding your corporate clients' expectations?
  - Reviewing new options to hourly rates/billable hours
    - How to use these effectively?
    - Examining situations where alternative billing structures can be implemented
  - What are the challenges with alternative fee structures?
  - Configuring, negotiating and employing alternative fee structures
  - Monitoring the effectiveness of alternative fee structures
- Benefiting from billing software and technology
  - Cost management
  - Up the savings by improving process efficiency
- Invoicing: increase efficacy of legal invoice clarity and review
- Choosing and retaining a law firm that will deliver the best quality work at the lowest possible cost
  - Ensuring your law firm is responsive to your needs
  - Corporate clients: What do you really want? More in-house resources, more cost-effective outside counsel or some combination?

5:45 **Chair's Closing Remarks – Conference Concludes**

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service provider offering cost-effective, high quality services and proprietary smart software solutions to in-house legal departments and law firms across Canada. LexEdge is an affiliate of the Kochhar Group, one of India's leading legal and business process outsourcing companies providing LPO services to large multinational corporations including Fortune 500 companies in Canada, North America, Europe and Japan. [www.lexedge.ca](http://www.lexedge.ca)

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For over 20 years, **The Canadian Institute's** conferences, summits and executive briefings have provided the business intelligence that Canadian decision makers need, to respond to challenges and opportunities both here at home and around the world. With a view to provide information on the leading edge, **The Canadian Institute** operates as a think tank — monitoring trends and developments in all major industry sectors. Headquartered in Toronto, **The Canadian Institute** produces over 180 events attended by thousands of senior executives from across the country. For more information, visit [www.CanadianInstitute.com](http://www.CanadianInstitute.com).



**DISTANCE LEARNING IS NOW AVAILABLE!**



Attend the conference from the convenience of your home or office. Save money on travel, or view the conference according to your own schedule. This interactive live webcast

allows you to participate in the sessions as they occur, download handouts, and ask questions.

The recorded archives of the presentations will also be available for you to view after the conference is over, so you can re-watch sessions, or view any sessions you may have missed.

**The Canadian Institute's Green Initiatives:** What are we doing to reduce the environmental impact of hosting conferences across Canada?

**EFFORTS**

- ✓ We print all brochures with The Canadian Institute's Environmentally Tri-Certified (FSC, PEFC, SFI) Print Partner
- ✓ We have reduced paper print and use by more than 25% over the past year
- ✓ We provide webcast options for individuals unable to travel to our events
- ✓ We encourage our delegates to recycle their conference badges

**PARTNERS**



The Canadian Institute, in partnership with Zerofootprint, is pleased to announce a program that will allow attendees to contribute to the reduction of carbon emissions associated with our events. For only \$5 you can offset your contribution and support tire recycling projects in Canada. For more information visit [www.zerofootprint.net](http://www.zerofootprint.net)

- ✓ We also work very closely with all conference venues to reduce, reuse and recycle

**Register at 1-877-927-7936 or in Toronto 416-927-7936 or [www.CanadianInstitute.com/LPO](http://www.CanadianInstitute.com/LPO)**

The Canadian Institute's

# Effective LPO Implementation & Management Strategies to

# REDUCE LEGAL COSTS

Enhance Efficiency • Increase Flexibility  
Maximize Profitability • Augment Competitive Edge

## Top Reasons to Attend

- ✓ PROTECT yourself against ethical dilemmas
- ✓ EQUIP yourself for post-contract administration
- ✓ OBTAIN the knowledge and MAKE an informed decision
- ✓ REDUCE costs
- ✓ GAIN the competitive advantage

## REGISTRATION FORM

To expedite your registration, please mention your Priority Service Code

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- Phone:** 1-877-927-7936 or 416-927-7936
- Fax:** 1-877-927-1563 or 416-927-1563
- Email:** CustomerService@CanadianInstitute.com
- Mail:** The Canadian Institute  
1329 Bay Street  
Toronto, Ontario M5R 2C4
- Online:** www.CanadianInstitute.com/LPO

## ADMINISTRATIVE DETAILS

VENUE: MARRIOTT BLOOR YORKVILLE HOTEL  
ADDRESS: 90 BLOOR STREET EAST, TORONTO, ON.  
TEL.: 416-961-8000

## Hotel Reservations

For information on hotel room availability and reservations, please contact Marriott Bloor Yorkville at 1-800-859-7180. When making your reservation, please ask for "The Canadian Institute's Corporate Rate".

## Program Materials

Conference participants will receive a comprehensive set of conference materials prepared by the speakers, as an excellent reference source after the conference. If you have paid and are unable to attend, the conference materials will be shipped to you upon request only. Request must be received within 30 days upon conclusion of the conference.

## Payment Policy

Payment must be received in full by the conference date to ensure admittance. All discounts will be applied to the Conference Only fee (excluding add-ons), cannot be combined with any other offer, and must be paid in full at time of order. Group discounts available to individuals employed by the same organization.

## Cancellation and Refund Policy

You must notify us by email at least 48 hrs in advance if you wish to send a substitute participant. Delegates may not "share" a pass between multiple attendees without prior authorization. If you are unable to find a substitute, please notify **The Canadian Institute** in writing no later than 10 days prior to the conference date and a credit voucher will be issued to you for the full amount paid. Credit Vouchers are valid for 1 year and are redeemable against any other conference by **The Canadian Institute**. If you prefer, you may request a refund of fees paid less a 25% service charge. No credits or refunds will be given for cancellations received after 10 days prior to the conference date. **The Canadian Institute** reserves the right to cancel any conference it deems necessary and will, in such event, make a full refund of any registration fee, but will not be responsible for airfare, hotel or other costs incurred by registrants. No liability is assumed by **The Canadian Institute** for changes in program date, content, speakers or venue.

## Incorrect Mailing Information

To advise us of changes to your contact information, please send amendments by Fax to 416-927-1061 or email us at Data@CanadianInstitute.com or visit our website and click on "update your customer information".

STEP 1

CONFERENCE CODE: 405L10-TOR

YES! Please register the following delegate for the  
Effective LPO Implementation & Management Strategies to Reduce Legal Costs

For group discounts please call 1-877-927-7936

FEE PER DELEGATE	Register & Pay by Jan 21, 2010	Register & Pay after Jan 21, 2010
<input type="checkbox"/> Conference (on site)	\$1895 + 5% GST = \$1989.75	\$2095 + 5% GST = \$2199.75
<input type="checkbox"/> Conference + Workshop	\$2390 + 5% GST = \$2509.50	\$2590 + 5% GST = \$2719.50
<input type="checkbox"/> Live Webcast (Conference Only)	\$1595 + 5% GST = \$1674.75	
<i>Conference participants will receive a CD-ROM of the conference materials as part of their registration fee.</i>		
<input type="checkbox"/> Please add a copy of the *Conference Proceedings (BINDER) to my order for \$195 + \$21.95 (S&H) + (applicable taxes) <small>*Published and shipped within 4 weeks from conference</small>		
<input type="checkbox"/> I cannot attend but would like information regarding conference materials.		
<input type="checkbox"/> Yes, I would like to reduce the environmental impact of my attendance by contributing \$5.00 to support tire recycling projects in Canada.		

STEP 2

## CONTACT DETAILS

NAME	POSITION	
ORGANIZATION		
ADDRESS		
CITY	PROVINCE	POSTAL CODE
TELEPHONE	FAX	
EMAIL		
TYPE OF BUSINESS	NO. OF EMPLOYEES	
APPROVING MANAGER	POSITION	

STEP 3

## PAYMENT

Please charge my  VISA  MasterCard  AMEX

NUMBER \_\_\_\_\_ EXPIRY \_\_\_\_\_

SIGNATURE \_\_\_\_\_

## Wire Transfer (\$CAD)

Please quote the name of the attendee(s) and the conference code 405L10 as a reference.  
Beneficiary: **The Canadian Institute**  
Bank Name: HSBC / Account #: 362-055319-001  
Address: 150 Bloor St, Suite M100, Toronto, ON  
Swift Code: HKBCCATT / Branch #: 10362

I have enclosed my cheque for \$ \_\_\_\_\_ including GST made payable to  
**The Canadian Institute** (GST No. 84221 1153 RT0001)