



Date: April 27, 2026

Time: 8:30 AM – 4:50 PM

Format: Virtual

7.0 CLE credits (3.0 Ethics) APPROVED

8:30 AM - 8:45 AM: Introduction and Welcoming Remarks

Speakers: Hon. Kevin Duffan/VSB President K. Brett Marston/Chris Fortier

8:45 AM - 9:45 AM: Cybersecurity Practices for Virginia Attorneys: Practical Advice for Securing Your Legal Practice (Whether Big or Small)

1.0 hour LIVE CLE credit (including 1.0 hour ethics)

In today's legal landscape, cyber threats are a reality for firms of all sizes and budgets. Practitioners will learn to identify common cyber risks affecting legal practices and gain practical strategies for implementing cybersecurity protocols and policies to help protect firm data and sensitive client data. Learn how to develop sound security procedures (such as strong password requirements, multi-factor authentication, phishing awareness, device and network security, secure communication practices, data backup and recovery strategies, and standard operating procedures). Additionally, learn how to create an incident response plan and help firms ascertain next steps when an attack happens.

You Will Learn How to:

- Identify common cyber risks to law firms.
- Implement essential security measures and use checklists and tools to secure your infrastructure.
- Build a detailed incident response plan & assess cyber insurance policy.
- Determine whether you have notification obligations under Virginia's data breach notification statute.

Speakers: Mike Maschke & Patrick Austin

9:50 AM - 10:50 AM: Generative AI Ethics for Legal Practitioners

1.0 hour LIVE CLE credit (including 1.0 hour ethics)

Confidentiality and competence are just the start of AI ethics. This program will explore less frequently discussed yet frequently encountered ethical challenges. For example, this program will examine the ethical consideration when billing clients for AI-enhanced legal services, candor to the court regarding AI use, managing AI bias, and unauthorized practice of law (UPL) risks when nonlawyer staff or clients use AI tools. Practitioners will also learn how to address emerging issues such as generative engine optimization (GEO) and attorneys' responsibilities when learning of inadvertent disclosure through AI platforms, or improper AI use by opposing counsel or pro se nonlawyers. Additionally, practitioners will gain practical guidance for navigating these ethical challenges while ensuring compliance with professional obligations in a rapidly evolving legal landscape.

You Will Learn About:

- The ethical considerations for billing clients for AI-assisted legal work and related professional responsibility rules.
- The duties of candor to the court when using AI tools in legal practice.
- How to identify and manage potential AI bias in legal workflows and evaluate its impact on ethical obligations.
- Attorneys' responsibilities when employing GEO and supervising or responding to nonlawyer staff or clients employing AI.
- What to do when encountering inadvertent disclosures through an AI platform, or improper use of AI by others, including opposing counsel, nonlawyer staff or pro se litigants.

Speakers: Kellam Parks, Julie Bays, KC Halm

10:55 AM - 11:55 AM: From Entry to Exit: How to Engage with Providers and What to Do If a Provider (Even the AI) Underdelivers

1.0 hour LIVE CLE credit

Change is the only consistency that exists in our marketplace. Whether your firm relies heavily on technology or uses it minimally, practitioners will benefit from leaning

frameworks by which to assess or reassess your firm's technological needs, and helpful approaches when shopping for new technology, including AI programs. Practitioners will also learn how to engage with vendors when entering software agreements, including key terms and provisions to look for in SaaS contracts and related tech agreements, and how to negotiate unwanted terms. Finally, when a vendor underdelivers and you decide to exit the agreement, learn how to develop an exit strategy to transition from one provider to another.

You Will Learn How To:

- Select software products.
- Identify key language in software agreements that may need negotiation, as well as how to negotiate terms.
- Determine your "breaking point" to decide whether a software provider serves your firm's needs.
- Create a plan to transition your firm from one software or AI provider to another considering your ethical obligations to your firm and your clients.
- Make quick software provider transitions when ethical obligations are at risk now.

Speakers: Chris Fortier & Vedia Jones-Richardson

12:00 – 12:30

ASK THE EXPERTS

12:35 PM - 1:35 PM: Tech of Writing: AI and Automation That Can Help Ensure Timely Drafts, Consistent Product, and Fewer Client Ethical Headaches

1.0 hour LIVE CLE credit

The tools you have in your tech stack (even the AI you already own) have the potential to provide immense power to perform a variety of practical functions, including formatting documents to a court's preference, accessing text of law you frequently use, and inputting names into your documents as your client spelled them. Where attorneys once manually built templates, inserted client information, and copied boilerplate language, you have tools including AI that can now assist in creating, updating, and customizing these materials quickly and intelligently. Practitioners will obtain practical, hands-on guidance

for using tools you already have including AI to improve the speed and quality of your legal products while maintaining compliance with court rules and professional standards.

You Will Learn How To:

- Build AI-assisted templates that streamline substantive drafting, reducing repetitive formatting and boilerplate work.
- Create and use auto texts and clause libraries to consistently present legal principles, adapt language for different jurisdictions, and improve overall document accuracy.
- Leverage AI-driven mail merge and data integration tools to automatically populate client details, ensuring correct spelling, consistency, and accuracy across all documents.
- Understand the basic building blocks AI provides—from drafting prompts to content suggestions—to ensure timely creation of legal drafts, forms, and other client-facing materials.

Speakers: Chris Fortier & Catherine Sanders Reach

1:40 PM - 2:40 PM: Setting Up for Success: Tools that Power Your Prep for Trials, Depositions, Big Presentations, or Negotiations (and not just AI)

1.0 hour LIVE CLE credit

Preparation is the key to success. However, do you have the tools needed to set yourself up for success with that upcoming trial, deposition, or big client meeting? Explore how AI-assisted tools aid tasks throughout the litigation process. For example, learn how to leverage AI to quickly locate and organize evidence for court, create visual aids and compelling presentations, and improve efficiency and focus during depositions and negotiations. Practitioners will also get up to date on how to make technology based evidentiary challenges by learning some of the unique features of cloud-based evidence and e-discovery that make it potentially susceptible to exclusion. For instance, disappearing logs, ambiguous service agreements, jurisdictional complexities, and the absence of standardized forensic protocols are just a few of the challenges practitioners must be familiar with. By combining AI-enhanced work-products with e-discovery and cloud-forensics awareness, attorneys can anticipate evidentiary issues, strengthen discovery strategy, and present cases with clarity and confidence.

You Will Learn About:

- AI-assisted tools to make your litigation tasks more efficient and impactful.
- Tips and tricks to ensure that your audience (whether that be a judge, jury, client) gets the point you want them to hear.
- Cloud forensic methodologies and potential gaps that can be turned into cross-examination points or motions to exclude.
- The impact of jurisdictional ambiguity and multinational server locations on discovery, subpoenas, and venue disputes.
- How the absence of forensic standards in the cloud can open the door for *Daubert* challenges or questions of evidentiary integrity.

Speakers: Hon. John Tran & Kellam Parks

2:45 PM - 3:45 PM: Integrating AI into Legal Workflows: What Lawyers Need to Know to Work Faster and Better

1.0 hour LIVE CLE credit (including 1.0 hour ethics)

The legal field is shifting quickly as AI-powered tools become part of everyday practice, raising client expectations for faster responses, clearer reasoning, and greater transparency. This session gives practitioners a clear understanding of today's practical AI capabilities, how these tools support legal work, and how to use them ethically. You will be given a system for verifying AI-enhanced results and documenting that verification, to root out any fake cases and ensure all your research is top shelf. Finally, you will also learn how to discuss your AI-assisted work product with clients in a nuanced and positive way that will win them over as clients and improve your client-attorney relationship.

You Will Learn About:

- Get a quick survey of AI tools in legal and what they do, such as research, drafting, analytics, e-discovery, billing automation, and practice -management, and what to look for in a product (RPC 1.6)
- Learn how AI can enhance attorney performance and support legal workflows
- Learn how AI is reshaping client expectations of transparency and division of duties (RPC 1.4, 1.2)
- Procedure and policy changes to verify work product, document AI use and lawyer oversight, and supervise product and staff work ethically. (RPC 5.1-5.3)

Speakers: Charity Anastasio, Jared Jaskot, & Lauren Lester

3:50 PM – 4:50 PM: 60 Tech Tips in 60 Minutes

1.0 hour LIVE CLE credit

This program will provide a lightning round's worth of helpful tech tips that can be utilized by legal practitioners. The tips provided will highlight tools and strategies that can be used to streamline, automate, and enhance your legal practice.

You Will Learn About:

- Innovative tech tools and solutions that can be deployed for various types of legal work

Speakers: Catherine Sanders Reach, Reid Trautz, Tom Mighell & Cynthia Thomas