

# **Effective Screening and Onboarding Of New Appellate Clients**

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Conference on State and Federal Appeals**

**June 6-7, 2024**

**The Otis Hotel, Austin, Texas,  
and via Live Webcast.**

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**Mandatory disclaimer –**

**23 more days**

**member and panel chair of grievance committee**

**Nothing said in this presentation is on behalf of any entity  
whatsoever.**

**All in my sole capacity as an attorney licensed to practice law for  
38+ years with no findings of professional misconduct, breach of  
fiduciary duty, or legal malpractice.**

2

**The 1 in 100 “new breed” of legal client.**

**A win is a win, and a loss will be turned into a win  
(for the client, not for you or your law firm).**

3

**Grievance.**

**Malpractice claim.**

**Breach of fiduciary duty claim.**

**Fraud claim.**

**Claim of criminal conduct.**

**Adverse publicity.**

**Potential damage to professional reputation.**

**Potential loss of employment.**

**Actual or exemplary damages, or sanctions.**

**Potential loss of professional liability  
insurance or higher renewal premiums.**

4

**All designed to exert maximum pressure on you, your law firm, or your professional liability insurance carrier, to settle, thereby turning their loss into their win and your loss.**

5

**How do I know that they are out there?**

**Entangled with one - 26<sup>th</sup> year of practice.**

**For 6½ years, damaged my quality of life.**

**2 grievances, 2 appeals, 2 dismissals, lawsuit, ugly counterclaims & affirmative defenses, death penalty sanctions, appeals, allegations of fraud and criminal conduct, finally culminating in a 12-0 jury verdict for every penny owed plus interest and costs.**

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## Title search: Effective Screening and Onboarding of New Appellate Clients

Also available as part of the eCourse

[2024 eConference on State and Federal Appeals](#)

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