

## 2024 First Friday Ethics (September 2024)

### September 6, 2024 • STUDIO WEBCAST

#### Friday Morning, Sep. 6, 2024

9:30 am 1.00 hr ethics	<p><b>Privileged Communications: Ethical Challenges and Best Practices for Tax Practitioners with Organizational Clients</b></p> <p>The question of whether and how the rules under Circular 230, which governs federal tax practice before the IRS, apply to in-house counsel is often raised. Join the Office of Professional Responsibility (OPR), the IRS responsibility for oversight of practitioner, to learn about how in-house counsel may come within OPR's jurisdiction, OPR's role, mission, and procedures, pertinent Circular 230 provisions applicable to in-house counsel and other practitioners, and OPR's investigative and disciplinary processes. Also touch on procedures that should be put in place to ensure compliance with Circular 230 and other best practices.</p> <p>Sharyn Fisk, Internal Revenue Service - Washington, DC</p>
10:30 am	<b>10-Minute Break</b>
10:40 am 1.00 hr ethics	<p><b>Ethical Concerns of AI and the Practice of Law (Replay)</b></p> <p>We all see multiple stories about the rapid growth and entry into our daily lives of artificial tools. They seem to be everywhere. It is difficult to overstate how much things change with the rise of these new technologies, or how important it is that companies embrace the opportunity to execute it correctly. Having conversations regarding the proper embrace of these technologies and these tools is a crucial first step, including drafting policies to assist lawyers with their beneficial and thoughtful adoption and use of these technologies. This presentation defines the state of artificial intelligence tools, what benefits and risks exist, and finally steps to begin embracing these technologies with appropriate guardrails, policies, and training. It is less likely that artificial intelligence will destroy industries, and much more likely that companies that embrace artificial intelligence will take overtake those companies that do not embrace artificial intelligence.</p> <p>Mark G. McCreary, Fox Rothschild LLP - Philadelphia, PA</p>
11:40 am	<b>10-Minute Break</b>
11:50 am 1.00 hr ethics	<p><b>Client Selection, Contracts and Handling Complaints (Replay)</b></p> <p>During a long career, almost no lawyer can completely avoid conflicts and complaints from Clients. The nature of our adversary system provides many opportunities for stress, misunderstandings and disagreements about how the legal system works – or the client's expectations. Many times, these matters can be avoided in the intake process. But when a complaint arises, lawyers need to know how to respond and handle those attorney client disagreements in ethical and empathetic ways. This course takes you through the interview process, the execution of clear attorney fee agreements, maintaining clear communications, and ultimately handling an attorney client dispute. Dozens of great tips, sound advice, and reminders of our fiduciary duty under the Disciplinary Rules.</p> <p>Claude E. Ducloux, Attorney at Law - Austin, TX</p>
12:50 pm	<b>Presentations Conclude</b>