

# THE WAGNER LAW GROUP

7108 FAIRWAY DRIVE, SUITE 125  
PALM BEACH GARDENS, FL 33418  
Tel (561) 293-3590  
Fax (561) 293-3591

99 SUMMER STREET, 13<sup>TH</sup> FLOOR  
BOSTON, MA 02110  
Tel (617) 357-5200  
Fax (617) 357-5250

315 MONTGOMERY STREET, SUITE 904  
SAN FRANCISCO, CA 94104  
Tel (415) 625-0002  
Fax (415) 358-8300

[www.wagnerlawgroup.com](http://www.wagnerlawgroup.com)

## PRESENTATION TO ASPPA 2015 WOMEN BUSINESS LEADERS FORUM

- I. Goal: Providing the best possible legal service
  - A. In-depth personalized attention enabled by practice in a small firm
    - i. Passionate
    - ii. Practical
    - iii. Caring
  - B. Large firms are not in position to provide this kind of service
    - i. Hierarchical structure
    - ii. Being all things to all people in contrast to specialization
    - iii. Slow-moving, bureaucratic organizations
  - C. Best results come from commitment to a particular discipline, issue or cause
    - i. My allegiance and energies are devoted to a smooth-functioning private retirement benefits system
    - ii. After working in large law firms for 10 years, I felt I could best achieve my goals by establishing my own firm
- II. Organizational Characteristics needed to provide excellent legal services
  - A. Wagner Law Group's success is dependent on the commitment of its 23 attorneys, as well as its paralegal and support staff
  - B. Success with clients based on technical capability of our professionals as well as clients' perception of the firm's stability and reliability
    - i. To foster these qualities, we have developed a working environment where firm members can share their experiences and learn from one another.
    - ii. Pride in our brand means that all of us leave no stone unturned in the effort to give sound practical advice.

### III. Diversity of Workforce and Interaction by Firm Members

- A. A large measure of the Wagner Law Group's success is due to the diverse mix of our employees who bring the unique perspectives of varying age, gender and diversity of experience to solving legal problems.
- B. Cross-fertilization of ideas is enabled by having lawyers from the following industries on our staff:
  - i. Private legal practice
  - ii. Consulting
  - iii. Investment advisory
  - iv. Insurance
  - v. Accounting
- C. We do not practice in isolation which can be a problem in larger firms. Under our model, we constantly consult with one another, seeking out the views of other staff members

### IV. The Two Sides of Networking: Making Connections and Giving Back by Mentoring

- A. As in any service business, connections are made by reaching out to colleagues and friends for help, advice and coaching.
  - i. The best strategy: talk to people
  - ii. Exchange business cards
  - iii. Public speaking
    - a. Be prepared to break-down your area of expertise to large and small groups
    - b. Educate people on a one-on-one basis (*e.g.*, the importance of the private retirement system in allowing retirees to lead independent and productive lives while also providing capital for business enterprise.)
      - (I) Elevators (a cliché but effective if not overdone)
      - (II) The sports complex
  - iv. Serving in community organizations

B. Mentoring: a form of giving back to the legal industry

- i. Face to face communication facilitates the transmission of ideas and is one of the legal profession's greatest resources.
- ii. Open door policy for firm members
- iii. Offer insights and guidance to students and those new to the industry
- iv. Participate in educational programs
  - a. Benefits the educator by the flow back of new knowledge and insights

V. Work - Life Balance