



Client Intake: Managing Your Risk at the Outset of Representation

We will explore the ins and outs of the client intake process, including an in-depth look at the types of intake errors leading to malpractice claims, how to identify potential red flag clients, and how to build and sustain strong intake protocols. Through a combination of professional liability trends and data, real-life examples, and professional responsibility developments, you'll learn about the common pitfalls in this process, as well as best practices to implement in order to help mitigate liability exposure and ensure effective client intake procedures for your firm.

Dibble Dabble Double Trouble: Mitigating the Risks of Dabbling in Your Law Practice

In this section, we will define "dabbling" as it relates to legal services, review some of the risks of dabbling by attorneys in their practice settings, examine the issue with respect to legal malpractice and consider some of the relevant ABA Model Rules of Professional Conduct that may be implicated when dabbling. We also will explore specific practice areas that pose a threat when dabbling and best practices to avoid or mitigate the risk of dabbling in your practice.

The CNA Lawyers Professional Liability Claims Process

We will discuss the differences between a claim and a potential claim, an insured's reporting duties, how to provide notice of a claim and how the claims process works. After highlighting the areas of practice with the largest number of claims and the most common errors that lead to claims, we will review actual legal malpractice claims involving CNA insureds. This review will include a summary of how our claims department helped to resolve these claims and an analysis of the risk control lessons to be learned from these real-life examples.

Recognizing the Complexity of Law Firm Operations and Malpractice Exposures

What does it take to manage a well-functioning and successful law firm and who contributes to that success? In this webinar, we look at the individuals, entities and technologies that may positively affect or create legal malpractice risk exposures in a law firm practice. Here, we explore how support staff impacts the practice, vendors that may be helpful or harmful, and the emerging enigma of artificial intelligence. By assessing your own legal universe and recognizing where the risks exist, you may take steps to avoid legal malpractice minefields in your daily practice.

ONLINE COURSES

SORCE® On Demand

SORCE® On Demand is a convenient 24/7 online resource offering an on-demand, self-study platform that will help you identify exposures in your legal practice as well as provide relevant risk control techniques that can help you manage and minimize your professional liability risks. This educational platform is easy to use and accessible from any computer, laptop or tablet. CNA has collaborated with the CEU Institute, a leading provider of online continuing legal education, to provide the course content available on the platform.

CNA SORCE® On Demand

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- Specialized CNA Risk Control courses for premium credit* and CLE credit**
- 24/7 access to the platform

You must provide your CNA policy number for purchase.

*Exclusions may apply. Contact Gilsbar for more information.

**Where applicable. Please call 866-262-0540 or visit cna.com/lawyersriskcontrol for more information.

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Quarterly Webinars

CNA is proud to add this exclusive webinar series to its list of Lawyers Professional Liability risk control programs. Offered in live webinar format on four dates throughout 2025, the program is eligible for the full per-attorney premium credit, up to 7.5% per firm. Please visit the registration page or contact your broker for more information.

Webinar Series

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No group reservations.

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- **March 20, 2025**
1-3 pm CT
- **June 17, 2025**
1-3 pm CT
- **September 30, 2025**
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- **December 3, 2025**
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