

**The In-House Counsel & Corporate Law Section and  
Intellectual Property/Technology Business Section  
of the Santa Barbara County Bar Association present:**

**Professional Responsibility and Technology:  
What Are Your Obligations?**

Attorneys have ethical duties of competence, confidentiality, supervision, and communication in relation to the technology we all use to serve our clients. The speakers will address this potential minefield with a review of key ABA and state rules, and will provide practical strategies and best practices for compliance. Join us to ensure that you are up to speed with your obligations in this important aspect of legal practice, and earn a CLE ethics credit for only \$12.00 without leaving your desk!

**Speakers: Michael Swarz and Nicole Clark, Trellis Research**

Michael Swarz is a graduate of Brandeis University and the New England School of Law in Boston. He has developed a deep understanding of the legal technology world and has published extensively in that area and on the topics of electronic discovery, information governance, and digital evidence. He has presented programs on legaltech and e-discovery before numerous legal, IT, records, and compliance audiences. Michael is Director of Marketing with Trellis Research, a legal analytics platform that uses AI and machine learning to provide litigators with strategic legal intelligence and judicial analytics.

Nicole Clark, CEO and founder of Trellis Research, is a business litigation and labor and employment attorney who has handled litigation in both state and federal courts. She is licensed to practice law in three states, and has defended corporations and employers in complex class action and wage and hour disputes, as well as individual employment matters ranging from sexual harassment to wrongful termination. Nicole is committed to helping lawyers leverage technology ethically to gain a competitive advantage and achieve a more favorable outcome for their clients.

**CLE: 1.0 hour ethics**

**Date and Time**

Tuesday, September 22  
12 noon – 1:15 PM

**Location**

Virtual Presentation Via Zoom

**Reservations**

To receive the meeting link via email, please respond by  
Friday, September 18,  
to Chris Kopitzke,  
Chair of IP/Technology Business Section,  
[ckopitzke@socalip.com](mailto:ckopitzke@socalip.com)

**Cost and Payment**

\$12.00: Mail checks by Friday, September 18,  
payable to Santa Barbara County Bar Association,  
15 W. Carrillo St., Suite 106, Santa Barbara, CA 93101