

Professionalism Beyond the Bar: Working with Non-Attorney Professionals

Livestream: May 21, 2025, 3:00 – 4:00 PM ET (*available on-demand afterwards!*)

Series Description:

Exemplifying Professionalism

This series of courses explores the critical role of professionalism in legal practice and examines how civility shapes relationships with clients, colleagues, opposing counsel, non-lawyers and the court. Using the [American Inns of Court Professional Creed](#) as a springboard, you'll learn practical applications of professionalism and ensure your advocacy is not only effective but also exemplary.

Program Description:

Find out how to build strong, ethical partnerships across your legal team.

I will work continuously to attain the highest level of knowledge and skill in the areas of the law in which I practice.—The American Inns of Court Professional Creed

I will serve as an officer of the court, encouraging respect for the law in all that I do and avoiding abuse or misuse of the law, its procedures, its participants and its processes. —The American Inns of Court Professional Creed

Non-attorney professionals—such as experts, court reporters, investigators, medical providers, and IT consultants—are essential contributors to the success of any legal matter. Yet, their role is often undervalued or misunderstood in the broader conversation about legal professionalism. This program brings these indispensable team members to the forefront, exploring how attorneys can cultivate respectful, collaborative relationships that enhance both outcomes and reputations. Using real-world examples and established professional standards, examine common missteps that can lead to incivility or ethical concerns. Leave with practical strategies for fostering collaboration, building mutual respect, and effectively communicating across disciplines. From how you treat a court reporter in a deposition to the way you interact with an expert preparing testimony, professionalism matters as it can shape your own credibility, influence and effectiveness.

Learning Outcomes:

- **Identify Potential Pitfalls:** Participants will learn to recognize common missteps that may lead to ethical dilemmas or incivility when collaborating with experts, investigators, and other non-lawyer professionals.
- **Implement Effective Strategies:** Gain practical tips and ideas for fostering productive and respectful collaborations across disciplines, and enhancing communication and cooperation in your legal practice.

- Enhance Your Reputation: Understand how interactions with non-attorney professionals can affect professional standing, and the lawyer's role in modeling respectful and effective interdisciplinary interactions.

Outline:

- **Welcome and introduction of the topic (5 minutes)**
 - ☐ Welcome and panelist introductions
 - ☐ Brief overview of the topic: Why civility and professionalism matters when interacting with non- attorney professionals
 - ☐ Overview of the webinar goals:
 - Understanding ethical expectations.
 - Identifying common missteps that may lead to incivility or ethical concerns.
 - Practical strategies for fostering collaboration.
- **The Standards of Professional Conduct (10-15 minutes)**
 - ☐ *American Inns of Court Guidelines (Tenets)*
 - *I will work continuously to attain the highest level of knowledge and skill in the areas of the law in which I practice.*
 - *I will serve as an officer of the court, encouraging respect for the law in all that I do and avoiding abuse or misuse of the law, its procedures, its participants and its processes.*
 - ☐ *American Bar Association- Model Rules of Professional Conduct*
 - Rule 1.6 (Confidentiality of Information) -
 - Rule 5.3 (Responsibilities Regarding Nonlawyer Assistance)
 - Rule 8.4- Professional Misconduct – Attorneys must act with honesty and integrity in all professional dealings
 - Preamble: A Lawyer’s Responsibilities
- **The Importance of Professional Relationships (10 minutes)**
 - ☐ What types of non-attorney professionals do lawyers commonly work with?
 - Legal support staff (paralegals, legal assistants)
 - Investigators (used to gather factual evidence)
 - Medical and health professionals (treating doctors, experts)
 - Financial and economic experts
 - Litigation support (court reporters, interpreters, trial tech, process servers)
 - Subject matter experts (engineers, accident reconstruction, building inspectors)
 - Court staff
 - ☐ Why collaboration with non-attorneys (e.g., experts, paralegals, court reporters, vendors) matters to case outcomes
 - ☐ How mutual respect improves communication and performance

- **Common Sources of Tension or Incivility (10–15 minutes)**
 - ☐ Miscommunication or unrealistic expectations
 - Examples
 - ☐ Last-minute demands or failure to respect timelines
 - Examples
 - ☐ Undervaluing the expertise of non-attorney professionals
 - Examples
 - ☐ Billing disputes or lack of professional courtesy
- **Building Stronger, More Respectful Partnerships (10 minutes)**
 - ☐ Setting clear expectations
 - ☐ Understanding the professional limitations and pressures of industry partners
- **Professional Reputation and Long-Term Impact (10 minutes)**
 - ☐ Word-of-mouth among industry professionals
 - ☐ Referral risks and missed opportunities
 - ☐ Courtroom reputation and the perception of integrity
- **Q&A and Closing Remarks (5 minutes)**
 - ☐ Open floor for attendee questions.
 - ☐ Recap of key takeaways.
 - ☐ Closing statement to emphasize the importance of civility and professionalism in preserving the dignity of the legal profession.

Presenter Bios:

Carree Nahama (*moderator*) is the founder and owner of Nahama Law, celebrating its 10th anniversary of dedicated service to injured children and their families. With a reputation for compassion, diligence, and exceptional results, Carree leads her legal team to make a meaningful impact on clients' lives. An award-winning trial attorney, she was honored with the prestigious “Streetfighter” award by Consumer Attorneys of San Diego (CASD) in 2023. Throughout her career, Carree has exemplified the highest standards of civility and professionalism, setting a benchmark for others in the legal field. She is a Benchler and team leader for the Louis M. Welsh Inn of Court, where she fosters mentorship, ethical advocacy, and professional growth among peers. As co-chair of the Women’s Caucus for CASD, Carree champions initiatives that empower attorneys and promote inclusivity within the legal community. Guided by the Latin phrase “bona fide,” Carree embodies authenticity, integrity, and passion. A committed volunteer and gifted connector, she is known for her advocacy of intergenerational collaboration and her ability to unite professionals across various specializations and firm sizes.

Benjamin C. Bunn is the founder of Bunn Law Group PC specializing in plaintiffs' serious injury and wrongful death cases, often helping families through devastating crises with life-changing verdicts and settlements. He took a leadership role after 9/11, putting together a San Diego team of trial lawyers who represented New York area family's pro bono, recovering nearly \$100 million in compensation. He is a graduate of and faculty for Gerry Spence's Trial Lawyers College. He has served on the board of many San Diego organizations, including the Barristers Club, the Make-A-Wish Foundation and the YWCA, and is the 2025 President of the American Board of Trial Advocates (ABOTA). He has been honored as Community Leader of the Year by the San Diego Building Trades and recognized by the California State Legislature and State Senate for his commitment to working families and public service. In 2024, Ben received the Daniel T. Broderick III Trial Lawyer of the Year award, considered the highest honor given to a San Diego attorney.

Bob Juskie is a full-time alternative dispute resolution specialist and mediates cases throughout California and the western United States. As a practicing trial attorney for 35 years, on behalf of plaintiffs and defendants, Bob litigated and tried cases involving personal injuries, catastrophic injuries including traumatic brain injuries, wrongful death, premises liability, product liability, real estate and real property disputes, business, commercial, and insurance claims, legal and professional malpractice, malicious prosecution, and claims under the Americans with Disabilities Act. Throughout the course of Bob's practice, he was routinely retained in cases both for and against insurance companies. He uses his experience across multiple fields as both a plaintiff and defense attorney, and as a lawyer who tried cases to juries, to now assist parties in reaching a resolution before trial is necessary.