



**Minutes from the Chapter Meeting of the  
Austin Chapter of the Association of Legal Administrators  
April 23, 2015 at 11:30 am, Headliners Club**

**President's Chapter Meeting Announcements**

1. Shary Tutt, President, introduced herself and welcomed everyone to the meeting.
2. The Education Committee, chaired by Amada Koplos, is looking for committee members.
3. All committees are looking for new members, no experience necessary. If interested, please contact the committee chair.

**Luncheon Sponsor**

Documation was the meeting sponsor. Jennifer Barnett introduced herself and talked briefly about the services Documation provides for law firms.

**Luncheon Speaker**

Jennifer Barnett introduced the speaker, Chris Sims, CPA. He discussed "Establishing a Framework for Client Acceptance". The speaker bio and handout is attached as **ATTACHMENT A**.

**Adjournment**

The meeting was adjourned at 1:00 PM.

# ATTACHMENT A

**Speaker:** Chris Sims, CPA

**Session Title:** "Who is This Guy Anyway? – Establishing a Framework for Client Acceptance"

**Brief Speaker Bio:**

Chris Sims, CPA is the controller for Bickerstaff Heath Delgado Acosta LLP where he leads the day-to-day operations of the accounting, billing and information technology departments. he is involved in the strategic direction of the firm in those arenas working closely with the Management, Finance, and Technology Committees. Chris brings to the table experience in other industries including technology, non-profit, hospitality, and restaurants, and has more than 20 years accounting and finance experience. In his toolbox: banking relationships; inside and outside financing; cash management; budgets and forecasts; compensation; trust accounting; operational efficiency and savings; technology integration; time, billing and accounting software; and, risk management.

Of course many of you may recognize Chris from his many years as a member of ALA. He spent many years giving back to our chapter both as a member and in leadership functions. He served on the Board of Directors for the Austin Chapter most recently as President, President-Elect, and Treasurer. He also served as the Chair of the Compensation and Benefits Committee for several terms and as a member of the Community Relations and Website Committees. At the International level, he served as a member of the regional nominating committees.

**Course Description:**

*Have you ever wondered if you have good and complete information to make an informed decision to accept a new client? Well, wonder no more! This lunch-and-learn is all about what you can do to vet a new client and protect your firm by establishing a set of guidelines for client acceptance practices, avoiding conflicts, setting an appropriate retainer for the case, and take on more good paying clients.*