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Serving Clients Better by Working Together

An Inter-Firm Collaboration Illustrates the Best of Primerus

No other law firms in Nashville can say they have a Mexico desk.

But Primerus firm Spicer Rudstrom can.

For three months last year, the firm housed an attorney from fellow Primerus firm Cacheaux Cavazos & Newton (CCN) in Mexico, offering local Tennessee businesses face-to-face time with an attorney who could answer all their questions about doing business in Mexico.

This partnership is just one example of the countless ways Primerus firms collaborate to better serve clients with access to the highest quality legal counsel locally and around the world. As a result,


more and more clients are taking notice and seeing Primerus firms as a viable – and preferable – alternative to big law.

Felipe Chapula, partner at CCN, points to one such client who contacted Spicer Rudstrom to set up a meeting when they learned about the Mexico attorney exchange program.

“This enables medium-sized firms such as CCN and Spicer Rudstrom to provide services to a client that normally would do business only with a 600-plus lawyer firm,” Chapula said. “It shows how good law firms with good people and reasonable rates with this international footprint are of interest to larger clients that, even as we speak, tend to send their work to these huge law firms.”

This year Primerus is offering more opportunities than ever for members and clients to connect around the world through webinars, as well as in-person events in cities including London, England; Sydney, Australia; Buenos Aires, Argentina; Paris, France; Miami, Florida; and several other cities throughout the United States.

In addition to the annual Primerus Defense Institute (PDI) Convocation, Primerus also will host the first Primerus International Convocation May 3-5 in Miami, Florida. Clients from around the world are invited to attend the event, where they’ll attend legal education sessions and social outings, allowing them to get to



know Primerus attorneys in a no-pressure environment.

A Valuable Partnership

The idea for the CCN/Spicer Rudstrom partnership developed slowly over time. Marc Dedman, managing partner of Spicer Rudstrom, said it was his relationship with Chapula, formed through Primerus events over the years, that created the basis for the partnership. Add to that the unique business climate in Nashville – the second fastest growing city in the United States (behind only Austin, Texas) and a lack of established large, international law firms – and you have the perfect scenario for the exchange.

Dedman and Chapula first met at a Primerus event in Barcelona, Spain, in 2013, followed by several Primerus events since then.

“You get to know the people in Primerus firms, and you like them, respect them and feel comfortable with them,” Dedman said.

In 2016, Dedman was in a meeting with an executive from a growing health care company, who talked about the challenges of finding legal counsel around the world – including sky-high costs.

“He was talking to me about the fees he was getting charged by law firms ... numbers that are many multiples of what Primerus firm fees are,” Dedman said.

After months of determining a potential business model which could address the points raised by the health care executive, he contacted Chapula in October 2016. After almost a year of planning details – involving everything from housing, insurance, IT, logistics, bar and ethical requirements, and immigration and visa regulations – on September 4, 2017, CCN Mexico City-based attorney Jose Ernesto Fuentes Vilalta began work in an office at Spicer Rudstrom’s Nashville office.

The two firms identified potential companies that could benefit from

their program and even developed a mission statement: “Take what seems scary and show that it is not; take what seems expensive and show that it can be affordable; and take what seems complicated and show that it can be straightforward.”

Dedman wanted Tennessee businesses to see that they didn’t have to go to bigger law firms with higher fees, but they could instead take advantage of Spicer Rudstrom’s close international connections – and use that legal spend they would have had to instead grow their business.

As a result of a news article in a local business journal about the program, Dedman received about 25 unsolicited phone calls from companies who wanted a meeting with Fuentes. In addition, they held other meetings with companies Dedman’s firm already knew. In total, Dedman said they met with about 60 companies they otherwise would not have met.

“The first meeting on the first day, we met with someone whose initial intent was to come in and talk about an opportunity he had to bring in people from Mexico on a temporary basis to work in Tennessee. During the conversation, a lightbulb went off for him, and he started talking about opening a business down there and how that could be accomplished,” Dedman said. “He got this creative thought going, and I watched this happen again and again and again.”

Chapula also came twice to Nashville from Mexico City during the 80-day period to meet with companies. One of his meetings was with a large client who would normally only do business with large international firms.

“Without this program, they would never have contacted my firm, and they never would have contacted Felipe’s firm,” Dedman said. “We had an outstanding lunch-and-learn with them, and it was beyond their expectations. They were asking very technical questions that

Felipe knocked out of the park. He wowed them.”

Both firms already count the program as a success, and now they wait to see what additional opportunities arise from it.

Helping Clients

The CCN/Spicer Rudstrom program is the perfect example of what Primerus helps firms do best: develop trusted relationships among members and then work together to benefit clients.

“Primerus is a family of lawyers and clients that actively work together to better serve the best interest of clients,” said Primerus President and Founder John C. “Jack” Buchanan. “Reaching out, participating and helping each other is what Primerus is all about.”

Roger Barton, managing partner of Primerus firm Barton LLP in New York City, did exactly that after his firm joined Primerus in 2016. He was impressed with the concept of a society of the highest quality small to mid-sized law firms in the world.

He was eager to use his Primerus affiliation as a tool to show in-house counsel that his firm – and his fellow Primerus firms – offered a value proposition that was a viable alternative to the big law firms they might traditionally work with.


“We’re just one firm. It’s hard to get recognized as an alternative to big law,” Barton said.

But Barton thought if he could leverage the Primerus platform, and the connections the society provides nationally and internationally, that could change.

“I thought that’s definitely a win,” he said.

To make that happen, he immediately began attending Primerus events and getting to know his fellow members.

“It really is a society; there is a collegiality. There is a common purpose and goal,” Barton said. “We do band



together to be better as a whole than we are separate.”

Barton has worked with several fellow Primerus firms on matters. When a client of Brian Wagner from Primerus firm Mateer Harbert in Orlando, Florida, had a litigation matter in New York City, Wagner called Barton. When fellow New York City Primerus firm Ganfer & Shore needed another law firm to conduct an internal investigation for a client and issue a report, they called Barton. And when Primerus firm ONC Lawyers in Hong Kong needed an opinion written based on New York law, they called Barton.

Barton also has reached out to other firms when his firm’s clients have needs. For instance, when they needed a yacht specialist in Poland, they contacted a Primerus firm. They also have collaborated with Broedermann Jahn in Hamburg, Germany, on a cross-border litigation case, and with Greenberg Glusker in Los Angeles, California, on a fraud case arising out of a \$50 million private equity transaction.

In a recent meeting with a client – a private equity fund that manages \$200 billion and conducts business internationally – Barton shared about Primerus and its benefits for the client.

“We have firms in all of these jurisdictions we can rely on,” Barton said. “And we really know these firms. I could see they were very impressed by that.”

‘Sure Footing’ with Clients

The same thing about Primerus also impressed Karen Austin, Vice President, Legal & Licensing, for Tractor Supply Company, a Fortune-500 company based in Brentwood, Tennessee.

Longtime friend Bob Zupkus, who is retired from Primerus firm Zupkus & Angell in Denver, Colorado, told her about Primerus and invited her to the 2015 PDI Convocation in Amelia Island, Florida. She’s now a member of the Primerus

Client Resource Institute and plans to attend the first Primerus International Conference in Miami this spring.

“I think there are a lot of advantages to an association like Primerus because the firms have been vetted,” Austin said. “You can trust the law firm.”

Austin often has legal needs that arise in small towns around the United States, and Primerus is a great tool for her when that happens.

“It’s good to know I can pick a firm in Missouri or Nebraska and know they will be good,” she said. “You don’t want to just go to the biggest firm in the state and assume that’s what you need. You may be getting a brand new associate.”

Often, it’s very important for the lawyer she hires to be connected and experienced within the specific jurisdiction.

“And the Primerus lawyers definitely meet that bill,” she said.

Austin also loves Primerus’s emphasis on building relationships.

“I have been at this a long time, and I really work based on relationships,” she said. “At [an event like the PDI Convocation] you’re talking with people, having drinks, riding bikes. You just get a feel for what they’re about, and what they’re about is different than what a bad lawyer is about.”

At the Amelia Island convocation, she made contacts with many lawyers that gave her the confidence she needed not only to work with them herself, but also to refer them to other departments within Tractor Supply Company.

“I felt on very sure footing to hire any of the firms or to refer them out to our risk department or our real estate legal department,” she said.

New Opportunities

According to Buchanan, 2018 offers more opportunities than ever before for members and clients to get to know one another around the world. Based on the success of the annual PDI Convocation,

as mentioned earlier, Primerus will launch the first Primerus International Convocation May 3-5 in Miami, Florida.

Clients from around the world are invited to attend the event.

Other client opportunities include:

- The Primerus Client Resource Institute. Now with more than 50 members, the institute brings together in-house legal counsel, risk managers, claims managers and corporate executives responsible for legal affairs from around the world. There is no cost to join the institute, and clients who join are in no way obligated to hire Primerus lawyers.
- Webcasts offered in conjunction with the Association of Corporate Counsel International Legal Affairs Committee. Twice a month, Primerus attorneys from around the world share their expertise on legal matters affecting clients.
- Client events around the world, also in partnership with the Association of Corporate Counsel. Host cities in 2018 include London, England; Sydney, Australia; Buenos Aires, Argentina; Paris, France; Miami, Florida; and several more cities throughout the United States.

“Primerus events like this provide the highest caliber and highly relevant educational seminars and roundtable discussions,” Primerus Senior Vice President of Services Chad Sluss said. “Clients also have the opportunity to meet each other and meet lawyers from all over the world in one location. They can share their legal issues and learn about potential solutions.”

For a full list of events and webinars, visit primerus.com. **P**