

5 Creative Ways To Explode The Growth Of Your Law Firm: #3 Will **Shock & Awe** the Competition!

1. Presented By
1. **Montina Young Portis**



WHO AM I?



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- ▶ @MontinaPortis
- ▶ Montana@CIAMediaGroup.com
- ▶ 678-435-9373

NAMWOLF
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The Lawyer's Authority Revenue Roadmap

SYMPTOMS

KEYS TO SUCCESS

Freedom

Attracting the best clients and referral partners

Relationships are strong, referrals are consistent, the firm runs well and is an icon in the community — legacy is the next step.

Exhausted

Getting some results but working too hard

Attracting the right clients, referrals are consistent and systems are in place — the firm is finally ready to grow.

Frustrated

Not attracting the right clients

Overwhelmed, work is inconsistent and 'bad clients' can't be turned away.

Confused

Relying on Word of Mouth

Inconsistent and disappointing income, stress and too many 'bad clients' calling the office.

Thriving
SCALE



Scale authority and influence by distributing content using **multiple traffic sources**.

Predictable
SYSTEMIZE



Automate systems and marketing & focus on educational, authoritative thought leadership content.

Sporadic
BUILD



Build relationships and identify best referral partners.

Unpredictable
IDENTIFY



Identify the educational gaps in the market and **craft your HERO story**.

#1 - WEBSITE



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SGR Partners Kathy Zickert, Leah Ward Sears, and Dana Bradford Named The Best Lawyers in America© 2019 “Lawyer of the Year”



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Attorney Jonathan Russell Among Best in the World

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Upcoming

[Register](#)

Feb 25, 2019

12:00 AM - 12:00 AM

The Commercial Division: Past, Present and Future

[read more](#)

[Register](#)

Feb 26, 2019

12:00 AM - 12:00 AM

Maynard Movie Screening

[read more](#)

[Register](#)

Feb 28, 2019

12:00 AM - 12:00 AM

Steve O'Day Speaks on the Solar Panel Discussion at Southface

[read more](#)

Previous

Jan 18, 2019

Turner Environmental Law Clinic 20th Anniversary Conference

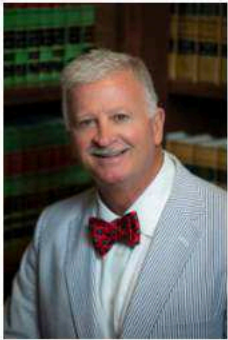
Jan 23, 2019

World Affairs Council of Atlanta: "Tropical Trump? What's Next for Brazil Under Bolsonaro"

Feb 12, 2019

GA Bar Launches Construction Law Section Hosted at SGR





NAME Robert D. Ingram, Partner

EMAIL ringram@mijs.com

EDUCATION Kennesaw College, BSEmorey University School of Law, JD

BAR State of GeorgiaState of Tennessee

MEMBERSHIPS

PRACTICE AREAS Insurance DefenseWorkers' CompensationBusiness and Intellectual Property DisputesProbate Litigation



Robert is a fourth generation Cobb Countian who has successfully tried numerous cases to verdict in State and Federal Courts on a broad range of **commercial** and **insurance** defense litigation matters. He has also tried many cases before AAA arbitration panels and workers compensation administrative law judges. Robert has also defended a wide array of class actions representing insurers;



Practice Areas

- Insurance Defense
- Workers' Compensation
- Business and Intellectual Property Disputes
- Probate
- Litigation

Education

- Kennesaw College, BS
- Emory University School of Law

Bar Admissions

- State of Georgia
- State of Tennessee

Robert D. Ingram

Partner

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Robert has also defended a wide array of class actions representing insurers, contractors, and manufacturers and has successfully represented many of the firm's clients in business and intellectual property disputes and probate litigation. He received his undergraduate degree from Kennesaw College with honors and his law degree from Emory University School of Law. He is a member of the Bar in both Georgia and Tennessee.

Bar Activities:

- President, State Bar of Georgia, 2005-06 President
- Cobb Bar Association, 1998-99
- State Bar Board of Governors, 1993-07
- State Bar Executive Committee, 1999-07
- Cobb County Bar, Board of Trustees, 1993-04

Chaired and served on numerous State Bar Committees including:

- Bench and Bar, Chair, 1997-04
- Lawyer Assistance Program, Chair
- Foundation of Freedom Commission, Chair
- General Counsel Overview Committee
- Chief Justice's Commission on Professionalism, 2003-05
- Commission on Continuing Lawyer Competency, 2004-12, Chair 2010-11
- Communications Committee, Co-Chair, 2009-13



Practice Areas

- Litigation
- Insurance Defense
- Workers' Compensation
- Civil & Commercial Litigation

Education

- Georgia Southern University, BBA, cum laude, 1999
- Wake Forest University School of Law, J.D. 2002

Bar Admissions

- State of Georgia
- State of Tennessee

Shane Mayes

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Shane Mayes is a trial attorney in the Litigation Department of Moore Ingram Johnson & Steele. Shane originally joined the firm in 2002, becoming a partner in 2009. In 2012, Shane accepted a position as an Assistant United States Attorney with the United States Department of Justice. After serving three years as a federal prosecutor, Shane returned to the firm in 2015.

Shane has a wide range of experience litigating in State and Federal courts. As a civil litigator, Shane has successfully handled cases involving business and employment disputes, premises and products liability, insurance, civil liability stemming from criminal acts, and government investigations. During his tenure as a federal prosecutor, Shane worked closely with federal agencies to steer investigations, prosecutions, and trials relating to federal criminal offenses, including white-collar crimes, fraud, identity theft, cyber crimes, civil rights violations, drugs, and violent crimes. Shane has litigated matters on behalf of clients ranging from individuals to large corporations.

Actively involved in bar and non-profit organizations, Shane has been recognized professionally on multiple occasions over the course of his career, including being named as a "Rising Star" by Super Lawyers Magazine | Atlanta Magazine and being listed in "20 Rising Stars Under 40" by Cobb Life Magazine.

Practice Areas

- Insurance Defense
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- Communications Committee, Co-Chair, 2009-13

Articles



Self-Insurance Institute of America, Inc. (SIIA)

CAPTIVE MANAGER CODE OF CONDUCT

January 2019

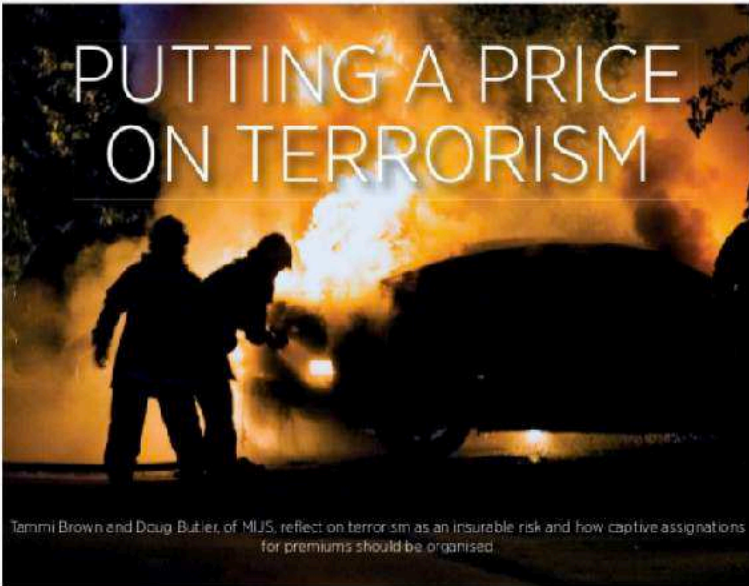
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On June 18, 2018 the U.S. Tax Court issued an opinion in Reserve Mechanical Corp. v. Comm’r. The IRS sought to recharacterize as taxable income the insurance premiums received by the taxpayer’s § 501(c)(15) captive insurance company (not a § 831(b) captive). The Tax Court ultimately found in favor of the IRS holding that the captive was not a valid insurance company and that the revenue received by the captive was taxable income. Despite the fact that the Tax Court ruled against the taxpayers, the ruling provides further guidance on what constitutes a legitimate micro captive and risk pool.

In light of the ruling, the following analysis differentiates the many negative facts upon which the Tax Court relied in Reserve Mechanical from how MUS Captive Management (“MUS”) forms and manages captives:

	Reserve Mechanical	MUS
Domicile	Similar to <u>Ayrahami</u> , the captive was domiciled offshore in a jurisdiction with minimal regulation. Here the captive was domiciled in Anguilla.	All captives are domiciled in one of ten of the most respected U.S. captive jurisdictions with rigid insurance regulatory and actuarial oversight.
Policies	The captive policies were “cookie cutter” with the policies not being suited to the actual needs of the named insureds, were retroactive to previous years, and were restrictive in nature as they were excess policies.	The captive policies are tailored to cover specific risk exposures of each individual insured and drafted by the senior liability partner of MUS. As such, MUS has written approximately 220 custom policies. Each policy is drafted to enhance coverage of the real and fortuitous risks facing the insured. MUS seeks to replace commercial coverage with the underwritten policies, and strives to prevent any overlap between the captive and commercial policies. Further, for nearly all captives an insurance broker analyzes whether comparable coverages, taking into consideration the policy terms and exclusions, to those purchased from the captive are presently available on





Tammi Brown and Doug Butler, of MIJS, reflect on terrorism as an insurable risk and how captive assignments for premiums should be organized.

Due to heightened scrutiny of terrorism coverage provided through small captive insurance programs and the related litigation currently pending in the United States Tax Court, some industry professionals have (surprisingly) adopted the position that a small captive program's legitimacy could be questioned if such captive provides terrorism coverage. The apparent foundation for this (minority) opinion is that because terrorism claims are remote, and premiums charged for terrorism coverage are excessive when compared to terrorism endorsements available on the commercial market, the "excessive"

remains a very real risk for business owners. Thus, a properly structured captive insurance program which offers terrorism

"While it is true that NBCR premiums are justifiably higher than commercially procured terrorism endorsements, this does not give captives

coverage and charges actuarially-determined premiums is a practical option that should remain available to all business owners.

In the wake of September 11, 2001, even after Congress passed the Terrorism Risk Insurance Act (TRIA) to provide a reinsurance market for P&G providers, the Government Accountability Office published two separate reports noting that (in addition to the \$5m loss threshold and requiring a terrorist act to be certified as such by the government), procurement of the TRIA endorsement would likely not protect insureds against all acts of terrorism, including acts of terrorism involving nuclear, biological, chemical,

DOING CAPTIVES RIGHT

Matthew Howard, senior partner at MIJS, speaks to *Captive Review* about what constitutes a legitimate captive

Written by
Matthew Howard



Matthew Howard joined Moore Ingram Johnson & Steele in 1999 and currently serves as senior partner in the firm's corporate, tax and estate planning department. Howard specializes in estate planning and has served as an active member of the Estate and Gift Tax Committee of the American Bar Association Tax Section since 1995.

There has been a lot of negative commentary in the "micro captive" (i.e. 831(b) captive) arena lately. Not unlike other sections of the Internal Revenue Code ("Code") like Sections 170(b), 412(b) and 419, to name a few, 831(b) has been used inappropriately by tax reduction promoters.

Congress provided, in Section 831(b), that a legitimate property and casualty insurance company with annual premiums of less than \$1.2m could elect to only be taxed on its investments and not its underwriting income. This helped to reduce expenses associated with complex insurance, accounting while at the same time allowing for the accumulation of surplus, both of which were barriers to captive implementation for small to medium sized companies.

Below is a list, not intended to be exhaustive, of what makes a captive legitimate:

1. The captive is created for the right reasons, to underwrite insurable risks of the affiliated business.
2. The insurable risks are actual risks of the affiliate and not just some random risk that can be found in the marketplace.
3. The IRS issued Revenue Rulings 2002-

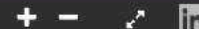
arial support for all premiums. Yes, independent support rather than an actuary on staff at the captive manager. There should be regular repricing of policies to take into consideration, among other things, loss history and increased surplus.

5. Unexpected events can cause the insured to need to withdraw money from the captive via dividends or loans. However, no insured should do either in the first 12 months. Sufficient reserves and surplus should be retained at all times.
6. Micro-captives should be formed in well regulated domiciles. Like it or not, this excludes smaller off shore domiciles. Larger domiciles like Cayman Islands or Bermuda are fine,

but to seven years, but eventually you should have claims. It's an insurance company.

8. Yes, there are tax and other economic benefits. Frankly, if capital gains tax rates equaled ordinary income tax rates, the benefits would diminish. Even so, the major economic benefit over time is providing desired liability coverage to the insured and if risk mitigation procedures are in place and work, the insured keeps the results.

In closing, some who make money forming and advising clients on captives should stop trying to scare prospects by writing half-truth articles in non-insurance publications, and on their web sites, regarding terrorism insurance. Those who understand TRIPRA know that gaps in coverage exist between what the commercial carriers and TRIPRA cover. This gap includes exclusions for certain acts of terrorism and policy limits. For example, it is virtually impossible to buy terrorism insurance that covers losses caused by chemical, nuclear, biological, and radiological agents. Having terrorism coverage to close these gaps makes sense in most instances. As in all policies, there should be intelligent pricing done by an independent qualified actuary. In this



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Choose whether your network is notified

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No

Notifying connections when you're in the news

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Change

Yes

Mentions or tags by others

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Yes





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How others see your LinkedIn activity

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Change

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Choose who can see your list of connections

Only you

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No





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Choose who can see your list of connections

Only you

Members will still be able to see connections who endorse you and connections they share with you. (Don't want your endorsements visible? Just choose to opt out) [Learn more](#)

Only you ▼

Viewers of this profile also viewed

Change

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How others see your profile and network information

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Culhane Meadows PLLC--Co-Founder & Managing
Partner / National Recruiting Coordinator

Dallas, Texas

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Mr. Walsh is the National Recruiting Coordinator and a Managing Partner in the Dallas office of Culhane Meadows PLLC, a firm that offers exceptional, yet highly-efficient, client service provided exclusively by partner-level attorneys with significant experience from large law firms or in-house legal departments of respected corporations. He has received the AV Preeminent® Rating in the Martindale-Hubbell Legal Directory and was named a Rising Star by Super Lawyers Magazine from 2013 - 2018.



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Big Law for the New Economy

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Culhane Meadows PLLC--Co-Founder & Managing
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Dallas, Texas

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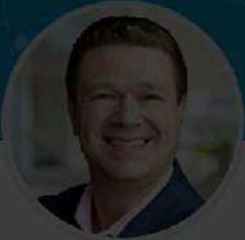


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Grant Walsh • 1st
Culhane Meadows PLLC--Co-Founding Partner / National Recruiting Coordinator
Dallas, Texas






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
Grant Walsh [Close]

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-  **Phone**
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-  **Email**
gwalsh@culhanemeadows.com
-  **Birthday**
December 27
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Attorney David Ward, Family Law



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Montina Young Portis

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Experience



Partner

Moore Ingram Johnson & Steele

Aug 2005 – Present • 12 yrs

Charleston, South Carolina Area

Practice all forms of insurance defense litigation and commercial litigation, including contract disputes, shareholder disputes, trademark and copyright disputes, insurance coverage disputes and workers' compensation.

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Charleston, SC 29492

Phone: 843-302-0002

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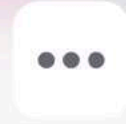
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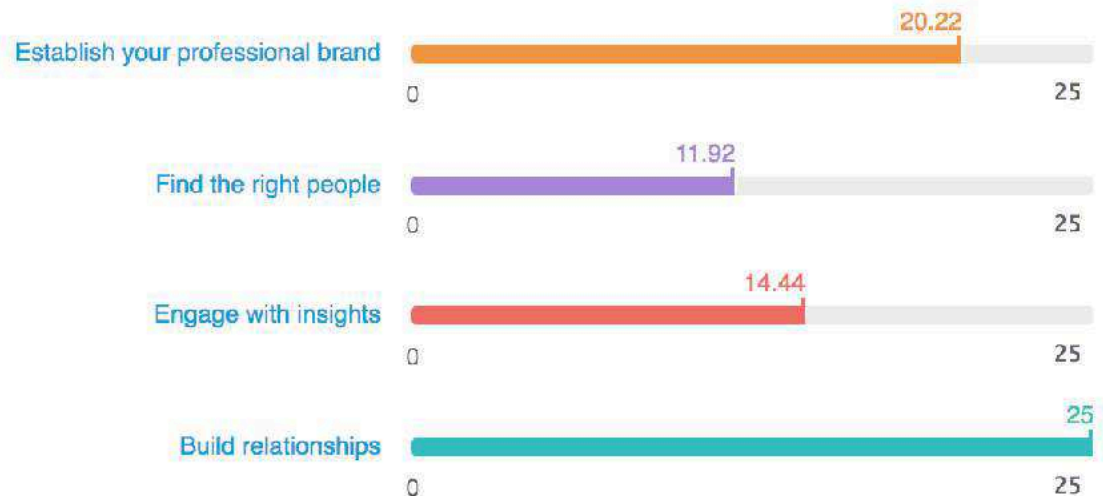
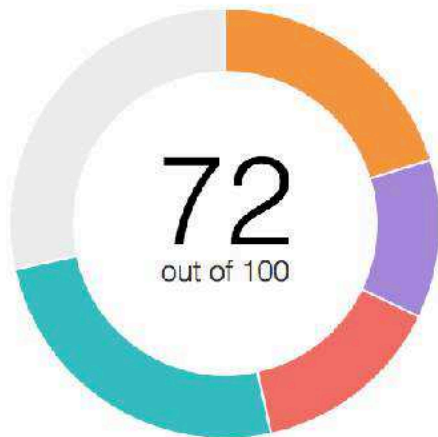
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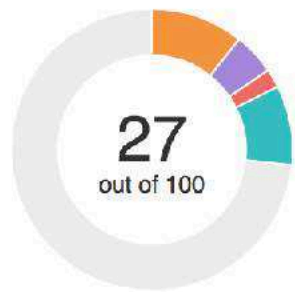


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Weekly Social Selling Index



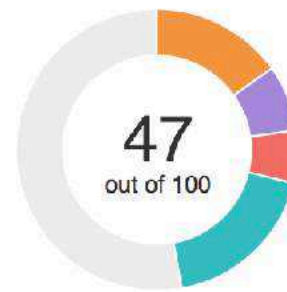
People in your Industry



Sales professionals in the Marketing and Advertising industry have an **average SSI of 27**.
You rank in the **top 1%**

⊖ Unchanged since last week

People in your Network



People in your network have an **average SSI of 47**.

You rank in the **top 7%**

⊖ Unchanged since last week



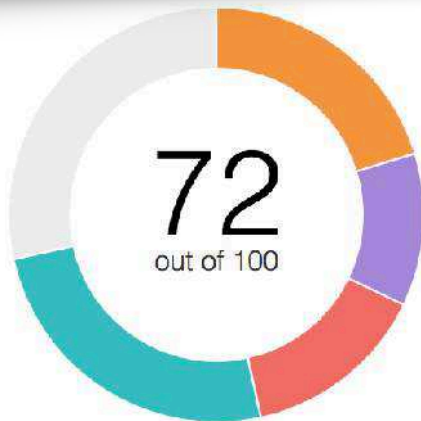
Montina Young Portis

★ Founder & CEO CIA Media Group |
MBE WBENC WOSB Certified | Award
Winning Video Production & Creative
Marketing Agency | Speaker★

Top 1%
Industry SSI Rank

Top 7%
Network SSI Rank

<https://www.linkedin.com/sales/ssi>



Facebook Page



Culhane Meadows
PLLC
@CulhaneMeadows

- Home
- About
- Services
- Photos
- Videos
- Posts
- Community
- Jobs
- Info and Ads



Liked Following Share ...

Contact Us

Automatically Respond to New Messages

Improve people's experience contacting your Page by setting up automatic replies in Messenger. You can greet them, share more...



Chat (Off)



Twitter

dlvr.it

SIGN UP FREE

Features

Support

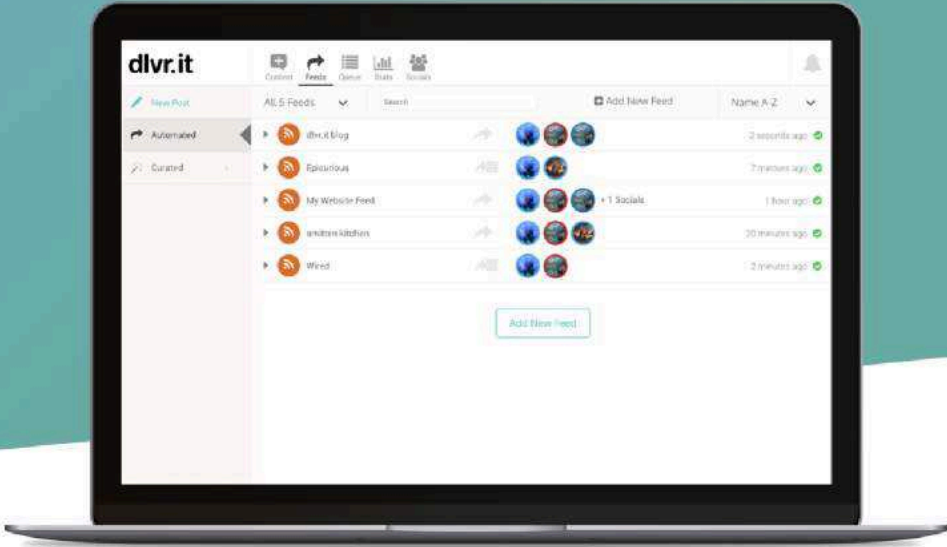
Pricing

Sign In

Automated Social Media Manager

Spend more time away from your desk

Try it Free

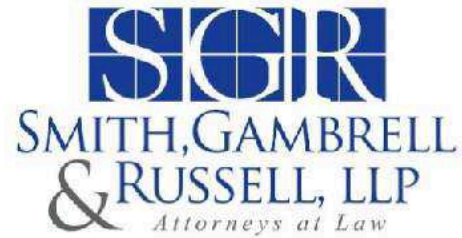


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Smith, Gambrell & Russell: Stephen M. Forte, Managing Partner, Atlanta

244 views 2 months ago

About Smith, Gambrell & Russell, LLP

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Learn more about Stephen Forte

<http://www.sgrlaw.com/attor.....>

Stephen M. Forte is the Managing Partner and Chairman of the Executive Committee of Smith, Gambrell & Russell, LLP.

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Why Social Media Marketing?

- ▶ Positions you as an expert, authority and thought leader
- ▶ Free Word of Mouth Marketing
- ▶ Promote an article, book, blog or video
- ▶ Backlinks add credibility
- ▶ Builds awareness

Why is Marketing Important?


If you're not consistently communicating how you help your clients another Firm will.

#3 - Shock and Awe Box

This legal marketing tool is a package that contains valuable resources highly relevant to the legal issues faced by the potential client. By educating the potential client, the attorney earns his or her trust and respect. This will often lead to a successful attorney-client relationship. ~Ben Glass

Shock and Awe Box

CLIENT PORTFOLIO
SECRET FILES
500+ videos produced



Do You Need a Lawyer to File a Workers' Compensation Claim?
Watch Now

How Does Bankruptcy Work?
Watch Now

Jane Lamberti
Brain Injury Attorney
www.jlamberti.com 408-543-8652

What Can An Attorney Help in a Car Accident Case?
Watch Now

Answers to Frequently Asked Questions from a Criminal Defense Lawyer
Watch Now

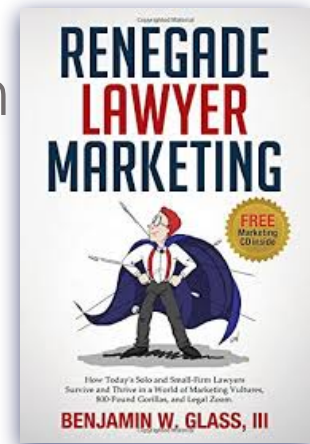
What are the rules that apply to trucking companies?
Shean D. Williams
2100 Commerce Drive, Atlanta
804-222-3922

Protecting Business Owners Facing Divorce
How can we help you today?
www.seandwilliams.com



Examples:

- ▶ A copy of the law firm's book related to the potential client's specific legal issue
- ▶ Whitepapers
- ▶ Case Studies
- ▶ Articles & Publications
- ▶ Newsletters
- ▶ A listing of testimonials from former clients
- ▶ Copies of articles written by or about the law firm
- ▶ Copies of the law firm's newsletter
- ▶ Magazines about the Firm
- ▶ Capability Statement
- ▶ Printed Bios



#4 Create a Marketing Plan

- ▶ GOALS (Why)
- ▶ STRATEGY (What)
- ▶ TACTICS (How)

Overall Marketing Goals:

- ▶ **GOALS (Why)** - Establish Your Law Firm as an authority on and the clear “go-to” for _____ in _____.
- ▶ **STRATEGY (What)** - Educational videos, networking and weekly blog
- ▶ **TACTICS (How)** - Software, Agency or Internal

#5 VIDEO



https://youtu.be/yy_OYGdFIHk

The 5 Types of Videos Every Law Firm Needs

1. Hero (Overview)
2. Educational
3. Authoritative
4. Thought Leadership
5. Testimonial (Internal or External)

WHY IS THE QUALITY IMPORTANT?

- ▶ Bad sound is distracting
- ▶ Bad lighting is distracting



Using Video for Business Development

1. Pitch Meetings – to explain your culture and/or expertise in specific areas
2. Recruiting – sending the video to a potential candidate
3. Sharing directly on your social media page
4. Sending the video link to a client or prospect to start a conversation about one of the practices
5. Staff & Attorney Orientation
6. Before a Speaking Engagement

Why Video?

*Videos position you as thought leaders,
experts, authorities, 'super' and the
'best' - use them!*

Create



CONTENT

Distribute



CONTENT

Create more



CONTENT

The THRIVE Video Marketing System



HERO
This style of video positions attorneys as the one that is bold and will stand up for clients and for what is right.



EDUCATIONAL
This style of video shows how you can help solve a prospective client's problem (without giving any legal advice).



AUTHORITATIVE
This style of video demonstrates your expertise in your practice for new clients and answers questions from current clients to build trust and authority.



THOUGHT LEADERSHIP
This style of video enhances your visibility and builds a public perception of your expertise.



TESTIMONIALS
People view video testimonials as 3x more trustworthy than written testimonials.



BUILD VIDEO CAMPAIGNS

OPTIMIZE VIDEOS

DISTRIBUTE VIDEOS

ADVERTISE VIDEOS

The business world today is a lot different than it was 10 years ago. Our videos position you as a thought leader, expert and authority in your industry.

www.CIAMediaGroup.com

What We Do - CIA Media Group

Video Production & Creative Marketing Agency
Fortune 500 Companies, Government Agencies,
Universities & Law Firms



Best Lawyers®

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Super
Lawyers™

MarketingTipsForLawyers.com

Visit me in the Exhibitor Hall



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5 Reasons Why Law Firms Need Custom Videos on Their Website

By Montina Portis

Are you looking for a way to attract more clients? Do you want to build a thriving law firm?

If so, keep reading as I outline five reasons why law firms need custom videos on their website.

Why Use Custom Videos?

As the old adage goes, "content is king", video content is rapidly becoming king of all of it.

One study recently conducted by eMarketer demonstrated that 2015 and 2016 were the first years that adult internet users in the United States were spending more time watching online video than they spent looking at text content up on social media.

Increased demand, as well as the reduced expenses of producing video, will mean that it isn't only more critical than ever for your firm to utilize video in your

marketing strategy; it also is more affordable. Here are 5 reasons why law firms need custom videos on their website.

Key #1: Quickly Deliver Your Message

You no longer need to pay high costs for television commercial spots. A digital video may be hosted in several places on the Internet which are accessible to anybody on the Internet, oftentimes for free. It will increase your Internet presence and additionally enable anyone worldwide to find out information about you during any time of the night or day – without being reliant upon paid programming. Now it's possible to place the video messages where individuals already are hanging out on the Web – such as on YouTube, which now is the 2nd largest search engine worldwide with an average of three billion searches per month.

Key #2: Engage Your Website Visitors

By now all of us expect to view video content. It is every place we travel from the shopping mall to the gas station. We've been conditioned to step and pay attention. Video will inform through both hearing and seeing, and increase the odds that we'll retain messages. Statistically, individuals also are more likely to hear the whole message when it is presented as a video than presented in additional formats.

Key #3: Drive Traffic to Your Website

Adding correctly optimized video to a site may boost your odds of being on the first page of a Google by as much as 53 times, according to Comscore. Video will increase the quantity of time individuals spend on your site. Also, video makes users more likely to share all of your content

through social media, which may assist in improving your site's performance in the search engines.

Key #4: Strengthen the Bond with Your Visitors

With video, it's possible to rapidly develop emotional connections with possible clients. Video permits direct communication of your passion for the law, demonstrating your skill and knowledge level, and ensures that individuals watching your videos get a good sense of who you actually are.

Key #5: Stand Out from Your Competition

Due to built-in video analytics, it is simple to track how effective a video is in helping to build your company, enabling you to make some real-time tweaks to the video content in order to make it more effective. It's possible to track how much of your video typically is being viewed, where your video is being seen, and a lot more. Plus, multiple marketing studies demonstrate that video marketing will have a better conversion rate than additional content formats.

Conclusion

When it comes to lawyer video marketing, the results speak for themselves. Profiles with videos on Lawyers.com are viewed 174 percent more than those without a video, and increase the click-through rate to a firm's website by 146 percent. When it comes to choosing an attorney building trust is important and this can be done by introducing your firm online and providing educational content to put clients at ease before they walk through your door.

Montina is the CEO of Creative Internet Authority, an award winning digital marketing company specializing in video production and promotion for lawyers and law firms. With a strong blend of education, technology, and marketing with her 15 years in the business world, Montina is focused on targeted and efficient results. Visit: creativeinternetauthority.com

