

# The Wellness Institute



2023

# The Wellness Institute



Virginia Law Foundation  
Virginia CLE®

THE BARNs AT WOLF TRAP | SEPTEMBER 28-30, 2023

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The VLF annually provides grants that benefit Virginians throughout the Commonwealth, and our grant-making capacity is substantially enhanced by the generosity of donors, where one hundred percent of unrestricted gifts support our grants program. Additionally, the net funds collected annually from Virginia CLE seminars and publications are reinvested into our mission, and a considerable portion is applied to the VLF endowment to help support future grants. As a result, your support of Virginia CLE is also allowing our thriving charitable work to achieve even greater success.

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# Faculty & Speakers

## Tim Carroll

Executive Director

Virginia Judges and Lawyers Assistance Program

Tim Carroll is the Executive Director of Virginia Judges and Lawyers Assistance Program. He grew up in Virginia and joined the United States Air Force after high school. After 28 years of service and numerous assignments around the world, he retired in Anchorage, Alaska, where he became the Chief Executive Officer of a fisheries-related business. In 2014 he returned to Virginia and assumed his current role in 2015. Mr. Carroll has an undergraduate degree in history from the University of Alaska and a Master's degree in business administration from Virginia Commonwealth University.



## Deborah Casello

President

Keys 365 Suicide Prevention

Fairfax, Virginia

Deb Casello is a master-level trainer in the evidence-based suicide prevention program, QPR. She first became involved in crisis and trauma support in 2008 and has assisted police and fire departments in both Alaska and Nevada, providing on-scene survivor support following a death in the community. Deb founded and directed the statewide suicide prevention outreach, You Are Not Alone, and was able to bring YANA to communities across Alaska by working for the Alaska Department of Education through the University of Alaska. Along with a degree in Communications, she was certified as a trainer in Mental Health First Aid and Critical Incident Stress Management and Debriefing. Deb worked at



Georgetown University Hospital and, while there, provided suicide prevention training to the University Pastoral Care and Residential Minister staff members. Deb furthered her expertise as the manager of the Tragedy Assistance Program for Survivors, serving as the National Military Survivor Helpline, and Development Team Manager of Community Outreach.



## Hetal Challa

Wellness Coordinator  
Supreme Court of Virginia

Hetal Challa is the Wellness Coordinator for the Supreme Court of Virginia, Office of the Executive Secretary. Prior to working for the Court, Hetal was an attorney and mediator, focusing on Guardian ad litem, and family law issues in the Hampton Roads area. In addition to her background in law and mediation, she has a degree in psychology with five years of clinical experience, counseling adults, adolescents, and children in an outpatient treatment center, suffering from mental health and substance abuse issues. Hetal uses her diverse background to focus on education and outreach for attorneys, law students, and the judiciary. She currently sits on the Executive Board of the Virginia Bar Association, Young Lawyer's Division, and is Chair of the Lawyer Wellness Committee.

# Kelly Corcoran

Conductor & Artistic Director

Intersection

Social Scientist

Vanderbilt University

Medical Center

Music Cognition Lab



Named “Best Classical Conductor” by the Nashville Scene, Kelly Corcoran is Artistic Director & Conductor of Intersection, a contemporary music ensemble now in its ninth season in Nashville. Corcoran founded the Nashville Philharmonic Orchestra and conducted the Nashville Symphony in hundreds of performances for nine seasons as Associate Conductor and Director of the Symphony Chorus. She has guest conducted many major orchestras including The Cleveland Orchestra, the Atlanta, Detroit, Houston and National Symphonies and orchestras in Argentina, England, Germany, Czech Republic, Spain, Mexico and Chile. Corcoran has worked with artists such as Bela Fleck, Leslie Odom Jr. and Amy Grant and conducted National Geographic's Symphony for our World international tour. A graduate of Boston Conservatory and Indiana University, a proud alum of the Taki Alsop Conducting Fellowship, the New World Symphony and the Lucerne Festival with Pierre Boulez, her primary mentors are Leonard Slatkin and Marin Alsop. Additionally, Corcoran is on the music faculty at Middle Tennessee State University and Lipscomb University and is proud to serve on the Advisory Council for Music Makes Us (supporting music education) and Nashville's Health Equity Workgroup. Kelly recently completed her Master of Public Health (MPH) in Health Behavior from the University of Alabama at Birmingham and is interested in the role of the arts in building health in our communities. She currently is a Social Scientist working at the Music Cognition Lab at Vanderbilt University Medical Center. She is also passionate about exploring innovative models for making and sharing classical music. Learn more about Kelly at [kellycorcoran.net](http://kellycorcoran.net)



# Donna Edbril, Esq.

Leadership and Career Coach

Former Chief Counsel

Avon Products and Godiva Chocolate

Donna Edbril is a certified leadership coach with expertise in helping working women attorneys advance their careers and find fulfillment. She brings a diverse background as a certified leadership coach, woman lawyer, and lawyer mom, leveraging a passion for supporting other women and serving as a source of encouragement and wisdom in their careers.

Donna began her career as a litigator for private law firms in New York City, moving in-house to work for global public and private companies in the consumer goods space. She spent 16 years at Avon, earning multiple promotions, from Senior Counsel through Vice President and Associate General Counsel, and serving as a trusted advisor to the C-suite, senior executives, and Board of Directors on business, operational, and reputational risks. Her career continued in an upward progression, leading her to serve as a three-time General Counsel and Corporate Secretary for West-Point Home, Godiva, and Cache. These diverse business environments enabled her to lead teams of varying size and structure across corporate governance, international transactions, employment, and business strategy. While she continued to move up the corporate ladder, she understood more than ever the challenge of balancing and managing a successful career with motherhood.

After more than 35 years of practicing law, Donna transitioned into coaching to serve as a strategic partner and sounding board to working lawyer moms, helping them to embrace their strengths, trust their instincts, and find the answers within so they can lead a happier and more fulfilling personal and professional life.

She is one of six approved coaches for the Women in Law Empowerment Forum (WILEF), an organization dedicated to support women in Big Law and Fortune 500 Corporate Legal Departments to become leaders in the workplace. Donna is also Co-Chair of WILEF's Mentoring Program for its Young Lawyers Division.



# Elizabeth Hopkins

Executive Director

J.P. Morgan Private Bank

Elizabeth Hopkins is an Executive Director and Banker at J.P. Morgan Private Bank, covering Richmond and Central Virginia. Elizabeth works closely with multi-generational families, private business owners, executives, entrepreneurs, endowments and foundations to present sophisticated strategies that help grow and preserve their wealth. She offers a knowledgeable perspective to guide them through the complex financial challenges that often accompany significant assets.

As a champion for her clients, Elizabeth invests time in understanding their aspirations and the legacy they wish to leave. She coordinates specialist resources across the financial spectrum to integrate investments, trust and estate planning, lending and more. Elizabeth is instrumental in delivering the full breadth of J.P. Morgan—the thought leadership and opportunistic ideas for which the firm is known. Her attention to detail and the way in which she simplifies concepts delivers a level of confidence and trust.

Over the course of a two-decade career in New York and Virginia, Elizabeth has gained keen insight into the needs of high-net-worth clients. Most recently, she was a Strategic Advisor with TSW, a small investment boutique and previously, was with Bank of America Private Bank, J.P. Morgan Private Bank and Goldman Sachs. In her return to J.P. Morgan, she plays an influential part in expanding the firm's presence in Richmond.

A native of Richmond, Elizabeth enjoys developing lasting relationships with clients. She is a board member for the MCV Foundation and Greater Richmond SCAN. Elizabeth sits on the Community Foundation for a greater Richmond Professional Advisor Council, the Richmond Ballet Advisory Council, the VCU School of Business Finance Advisory Board, and the Collegiate School Admissions Committee.

Elizabeth earned an MBA from the University of North Carolina at Chapel Hill. She received a B.B.A. in Finance and Marketing from James Madison University.





# Mac Keever

## Law School Graduate Entrepreneur

R. McIlwaine “Mac” Keever received Bachelor of Arts and Juris Doctor degrees from University of Richmond. He has served as an Assistant Commonwealth’s Attorney and a sole practitioner.

Multiple real estate development partnerships and ventures promulgated an affinity for assisting those facing foreclosure of their homes. Mac has had the privilege of helping several thousand homeowners conquer foreclosure and keep their homes through creative restructuring of their mortgages.

In multiple community endeavors as well as The Presbyterian Church, Mac stays enthusiastically close to his background. He enjoys mentoring young entrepreneurs and guiding their growth into successful and meaningful pursuits outside of traditional income production.

Mac’s dedication to our profession is manifested in his 30 years of passionate service to Virginia Judges and Lawyers Assistance Program, VJLAP. He has served two terms on its board, made innumerable presentations to law schools, Bar and other groups, and helped guide its growth and structure.

With his wife, Beth, Mac makes his home in Suffolk, Virginia, part of the Hampton Roads Metropolitan Area, a place where he is proud to say his family has lived for many generations.

# Anna McChesney,

## MS, LPC, MT-BC

Licensed Professional Counselor  
Board Certified Music Therapist

CEO, Healing Sounds

Anna is the CEO of Healing Sounds, LLC and board certified music therapist and licensed professional counselor in the Commonwealth of Virginia. She is a 2004 graduate of East Carolina University with degrees in Music Therapy and Music Education and a 2010 graduate of the Rehabilitation Counseling program at Virginia Commonwealth University. Anna has extensive experience in mental health, including 13 years providing music therapy services and crisis stabilization to detained teenagers and growing a group therapy practice grounded in music and art therapy. She has provided consultation for area school systems, co-authored standards and curriculum for state-operated programs within Virginia's department of education, and regularly leads workshops regarding social and emotional learning, burnout prevention and integrating creativity into mindfulness and wellness practices.



# PJ McIlvaine

Author and Emmy-Nominated Screenwriter

PJ McIlvaine is a prolific author/screenwriter/writer/journalist.

PJ is the author of the Amazon best-selling *Violet Yorke, Gilded Girl: Ghosts in the Closet* (Darkstroke Books, 2022), an MG supernatural historical mystery adventure about a poor little rich girl who sees ghosts in 1912 NYC.

PJ's debut picture book *Little Lena and the Big Table* (Big Belly Book Co., 2019), with illustrations by Leila Nabih, is about a determined little girl who wants her place at the grown-up table.

PJ has *A Good Man*, a gritty contemporary adult psych thriller



with Bloodhound Books (August 2023), and *The Conundrum of Charlemagne Crosse*, a YA alternate history set in Victorian London with Orange Blossom Books (September 2023). In 2024-2027, PJ has a series of *Creature Feature* picture books with Oghma Creative Media.

PJ is a co-host of #PBPitch, the premiere pitch party for picture book creators. She's been published in many outlets including *The New York Times* and *Newsday*. PJ also does interviews for The Children's Book Insider newsletter. Also, her Showtime original movie *My Horrible Year* with Mimi Rogers, Karen Allen, and Eric Stoltz was nominated for a Daytime Emmy.

PJ lives in Eastern Long Island with her family. Learn more at [pj-macwriter.com](http://pj-macwriter.com)



## Chris Rodriguez

Executive Director, Banker  
J.P. Morgan Private Bank

Chris Rodriguez is a banker in J.P. Morgan Private Bank's Washington, D.C. office where he advises affluent families, endowments, and foundations on their banking, borrowing, investing, and planning needs. Chris joined the Washington, D.C. team in 2013 with a focus on portfolio construction and implementation.

A South Florida native, Chris previously launched the Private Bank's Capital Advisory Group in Miami. In this capacity, he advised clients on their liabilities and capital positions, primarily through customized lending solutions involving concentrated stock holdings, private aircraft, fine art collections, life insurance policies, real estate, and unsecured exposures.

Chris began his career in corporate development at Deutsche Bank in New York City where he supported C-level executives in evaluating proprietary investments, strategic transactions and restructuring initiatives.

Chris graduated from New York University Stern School of Business with a B.S. degree in Finance. He currently sits on the Board of Directors of McLean Youth Soccer and resides in McLean, Virginia, with his wife and three children.

# Brandon Ross

Executive Director, Wealth Advisor  
J.P. Morgan Private Bank



Brandon Ross is a Wealth Advisor in the Washington, D.C. office of J.P. Morgan Private Bank. Drawing upon his experience as a trust and estate attorney at several prominent law firms in D.C. and Florida, Brandon designs integrated strategies for estate planning, business succession and wealth transfer. He is skilled at helping clients with their philanthropic interests and guides them on appropriate structures to establish their vision.

Considered a leader within the advisory community, Brandon serves on the board of directors of the Washington, D.C. Estate Planning Council. He has gained national recognition through his writing and speaking about a breadth of estate planning topics, including generation-skipping transfer tax planning, beneficiary designation forms for retirement accounts, gift tax return preparation, insurance planning, decanting and Florida homestead. He won Best Overall Article for Trust & Estate in 2017 and Best Practical Use Article for Trust & Estate in 2016 from the American Bar Association Section of Real Property, Trust and Estate Law's Probate & Property magazine.

Brandon was selected for the Dennis I. Belcher Young Leaders Program (2018 to 2020), offered by the American College of Trust and Estate Counsel Foundation. Previously, he was a Fellow with the ABA Section on Real Property, Trust and Estate Law (RPTE). Brandon serves as Co-Chair of the Estate and Gift Tax Committee and as Assistant Editor for the eReport for RPTE.

Brandon is a graduate of Cornell University and holds a J.D. from American University's Washington College of Law. He earned an LL.M. from Georgetown University Law Center's Graduate Tax Program, and was a member of the first class to receive an Estate Planning Certificate. Over the past few years, he has lectured at Georgetown on various topics for students pursuing the Estate Planning Certificate.

Active in the community, Brandon is an inaugural member of the Smithsonian Professional Advisors Network. He serves as a Class Agent for annual giving at St. Albans School and is a Cornell Alumni Admissions Ambassador.



## The Honorable Jane Marum Roush

Neutral

The McCammon Group

Former Justice

Supreme Court of Virginia

President

Virginia Law Foundation

Jane Marum Roush is the president of the Virginia Law Foundation. She is a mediator with The McCammon Group, which she joined in March 2016. She served as a justice of the Supreme Court of Virginia from August 2015 to February 2016. Justice Roush was a judge of the Circuit Court of Fairfax County for twenty-two years, from 1993 to 2015. Prior to becoming a judge, she practiced law for 12 years with the firms now known as McGuireWoods and Hogan Lovells.

Most recently, Justice Roush was the 2022 recipient of the Virginia Association of Defense Attorneys' Award for Excellence in Civil Litigation, which annually recognizes an individual with the highest standards of ethics, demeanor, and temperament and with exemplary conduct inside and outside the courtroom. In 2018, the Virginia Holocaust Museum and Virginia Law Foundation presented her with its Civility in the Law Award, and Virginia Lawyers Weekly inducted her into its Hall of Fame in 2021.

Justice Roush graduated from Wellesley College in 1978 and the University of Virginia School of Law in 1981. She and her husband, David, have two daughters and two grandsons.

# Raymond M. White

Executive Director  
Virginia Law Foundation



Ray White began his legal career as VISTA volunteer at Broome Legal Aid in Binghamton, New York, working for \$80 per week and food stamps. Following that time he worked an Assistant District Attorney in Albany, New York, where he conducted numerous jury trials as a member of the Major Offense Prosecution Bureau and The Felony Trial Bureau. Licensed in both New York and Virginia, his practice career also included entertainment law, FELA litigation, family law litigation, criminal defense, and appellate practice.

While practicing law (or perhaps more accurately because he was practicing law) Ray also found time to travel to Nashville and across the country to Los Angeles where he tried his hand as a songwriter and a screenwriter, all the while being properly advised not to quit his day job. He hasn't, but nonetheless he still writes to this day.

The most satisfying highlight of Ray's journey into the world of creativity is having the privilege to co-write a screenplay with the recently crowned Amazon bestselling author PJ McIlvaine. The second most satisfying highlight is, after considerable begging and pleading, convincing her to join us at this institute.

Mr. White served as the Chief Operating Officer for the National Institute for Trial Advocacy, where he was also a member of the faculty teaching trial and deposition skills to attorneys at several hands-on training programs throughout the nation. He was also CLE faculty for the New York State Supreme Court Appellate Division's Office of Attorneys for Children, the New York Public Welfare Attorneys Association, and the New York State Basic Prosecutors Training Program.

He is a two-time board member of Virginia's Judges and Lawyers Assistance Program, a regular trial skill teaching volunteer at Virginia's Hill-Tucker Prelaw Institute, and a long-time member of the Virginia Supreme Court's Access to Justice Commission where he has served for many years as the Chair of its Outreach and Education Committee.

Ray White is a 1977 graduate of Duke University and a 1980 graduate of Albany Law School of Union University. He continues to serve as the Executive Director for the Virginia Law Foundation and Virginia CLE<sup>®</sup> and has since 2012.



# Keynote Speaker Performer

## Tony Arata

American Singer-Songwriter

Born in Savannah, Georgia, and raised on nearby Tybee Island, Nashville Songwriters Hall of Fame member and songwriter Tony Arata is noted for his personal, poetic lyrics. When he moved to Nashville in 1986, his unique, soulful style began to get the attention of people like Allen Reynolds and Garth Brooks. Garth, to date, has recorded eight of Tony's songs, and "The Dance" won song of the year at The Academy of Country Music and received both a Country Music Association and a Grammy nomination, as well as a most performed song in Radio and Records Magazine. He has also had No. 1 records with "Here I Am" for Patty Loveless, "I'm Holding My Own" for Lee Roy Parnell, and "Dreaming With My Eyes Open" for Clay Walker. Other artists who have recorded his songs include Dolly Parton, Emmylou Harris, Bonnie Raitt, Trisha Yearwood, Reba McEntire, Delbert McClinton, Don Williams, Suzy Bogguss, Hal Ketchum, and more. Tony has also recorded four solo albums featuring new songs, covers, and guest appearances by many of Nashville's finest musicians as well as folks who have recorded his songs, including Garth, Patty, and Lee Roy. Learn more at [tonyarata.com](http://tonyarata.com).



# Teaching Artists

## Kyshona Armstrong

Artist. Songwriter. Activist. Music Therapist. Community Connector.

Kyshona has always lent her voice and music to those that feel they have been silenced or forgotten. She began her career as a music therapist, writing her first songs with her patients — the students and inmates under her care. She soon found the need to write independently and find her own voice, an endeavor which led her to the fertile ground of the Nashville creative community and songwriting culture. Since then, she has learned how to balance her music career with her passion to heal and foster community through her non-profit organization Your Song.

Her song “Listen” became an anthem for many in 2020. Of her album, one fan reviewer wrote: “Amidst these hard divisive times, this set of songs is a salve for the grief many of us are feeling about resulting

loss of family, friends, and community.” Within the grooves of its 10 tracks, Kyshona blends roots, rock, R&B, and folk with lyrical prowess to uplift the marginalized and bring awareness to the masses. It's for every silent scream, every heavy load, fearful thought, and a simmering sense of anger that the repressed, the lost, and the forgotten try to hide from the world.

Audiences will find a common thread of empowerment, overcoming adversity, and finding hope in her work. The show doesn't end when the last song is sung.



After her powerful performances, concertgoers often ask, “What can I do?”

Her response? “Listen.”



## Nickie Conley

Vocalist, Songwriter, Performer, Teaching Artist

Nickie Conley is an experienced and incredibly gifted vocalist, songwriter, and performer based in Nashville. With over 35 years of experience in the music industry, she is an established mainstay of the city's vibrant music scene. As a proud member of the LGBTQ community, Nickie is an advocate for equality, including women's rights, animal rights, LGBTQIA+, and BIPOC issues. She has dedicated her career to supporting artists as a background vocalist and toured with the legendary Donna Summer for four years.

Nickie's vocal talents have been featured on a diverse range of film and TV soundtracks, including Greenleaf, Nashville, and Evan Almighty. In addition to her work as a background vocalist, Nickie is an artist in her own right. Her music blends jazz, rock, folk, and R&B elements, and is infused with themes of self-acceptance, unity, and love. Drawing on her own experiences as a Queer woman of color from the South and her commitment to social justice, Nickie's lyrics resonate with authenticity and vulnerability.

"The goal of my music is to uplift, encourage, and inspire you," Nickie says. "To remind you that you are capable, powerful, beautiful, and worthy of any and all good that comes your way. You are enough just as you are. It's to help you feel seen and understood and to know that you are not alone."

# Shannon LaBrie

Singer, Songwriter, Teaching Artist

The secret to Shannon LaBrie’s artistry is the seemingly effortless blending of impassioned vocals with honest and insightful lyrics.

“Raining Hallelujah” is a timely song of resilience. Jonathan Frahm with For Folk Sake (UK) calls the song “a reminder that kindness and healing is just around the bend.”

Written alongside Grammy award winning songwriter Tia Sillers (“I Hope You Dance,” “Blue on Black,” “There’s Your Trouble”), “Raining Hallelujah” offers an optimistic long view while searching for a light at the end of the tunnel. When LaBrie sings, “Above every storm, a cloudless sky is waiting for you and me,” a choir of soulful singers echo her ambitious call.

Growing up on a farm in Nebraska, LaBrie attributes her passion for music to her Dad, who died when she was just thirteen. “He taught me my first guitar chords and when he passed away, songwriting became my way of grieving and dealing with the pain.”

On her latest album, *Building*, LaBrie’s undeniable voice and musicianship have been described as “nothing short of breathtaking” by American Songwriter and NPR added her heroic anthem “Fire-walker” to their Top 20 of 2020.



**I.**

**The Cost of Being Unwell:  
Easing Financial Stress so Lawyers  
Might Live Better Lives**

**Raymond M. White**

**Elizabeth Hopkins**

**Chris Rodriguez**

**Brandon A.S. Ross**



# Easing Financial Stress so Lawyers Might Live Better Lives

Raymond M. White, Executive Director of Virginia Law Foundation  
Panel Participant as Moderator

Lawyers face a series of unique financial challenges. They often have high debt loads from school, and if they are starting their own practice office space, staff support, and books even at the most basic level professions have done away with. But going into court for a day to argue motions or a six-week trial requires an investment and ongoing upkeep.

Being a lawyer can come with a salary that can give rise to a certain lifestyle – whether by preference or simply a perceived need to keep up and look the part. The type of car one drives, the neighborhood in which one lives, the restaurants where one dines and the clubs to which one belongs can often fall under subtle or not so subtle scrutiny.

Financial pressures are not new – but this generation has had to deal with unprecedented student loans and other expenses that have caused them to defer owning a house, starting a family, and making other basic life decisions. Living on credit to keep up has become a way of life for many, and lawyers are no exception.



The Barns at Wolf Trap,  
setting of the Virginia Law Foundation's  
inaugural Wellness Institute

The pressures are great, and the sense that a lawyer has to earn a fortune simply to stay above water can even add more pressure, especially when someone is facing wellness challenges stemming in whole or in part from being in a job that is not right for them – or at its most extreme, working in a toxic environment, for a person they don't respect or care for, and/or at a job they just plain hate.

Then there are small firm and solo practitioners that may not have a paycheck at all. Their biggest challenges are keeping the doors open and trying to support themselves, their staff, and their families or loved ones. Sometimes this causes lawyers to take on cases in areas of law where they are not as experienced and, as a former solo practitioner, this additional stress is immense and can often snowball and cascade into all different parts of one's life.

The feeling of being trapped is often unavoidable for some. For attorneys at established firms, the phrase 'golden handcuffs' is not new, but the handcuffs seem to get tighter with each generation when it comes to high paying jobs. There aren't as many as there were not that long ago. Finding one and keeping one brings with it its own kind of pressure.

There are small firm and solo practitioners who do quite well and balance their lives but there are also many who languish. Whether a small firm lawyer by choice or by default, as with any small business there is a lot of pressure on the shoulders of the key people.

What we are here to do now, though, is to remind you what you already know – that there are many people have perfectly wonderful lives without a top-tier salary whether within or outside of the practice of law. There are many people who don't have to live with the pressure of being a solo practitioner or in a small firm where every budget issue, every downturn of the economy, every memory of the pandemic can be magnified in ways never imagined.

We are pleased to share with you through, whether you are comfortable and excited about your practice environment or if you are looking for a change to balance your life differently, there are a variety of financial planning strategies and tools that are particularly well suited to attorneys and hopefully you will find some peace of mind as we share them.

To that end significant time will be spent of debt and the stress of lawyers' student loans while being intentional about liquidity needs, required spending, discretionary spending, life decisions and establishing an actual and psychological safety net. Additionally, forward thinking planning, including the peace of mind that a timely and properly targeted estate plan offers will be a tool that lawyers can rely upon for additional financial and psychological security. The materials that follow will be an outstanding guide for this session and something you can have with you now and once you've left Wolf Trap.

And finally, perhaps the most comforting source of inspiration will come from the fact that one of our speakers is a former attorney who has transitioned into the world of finance and he will share how this transition worked for him and how his life and world view have benefitted from this change.

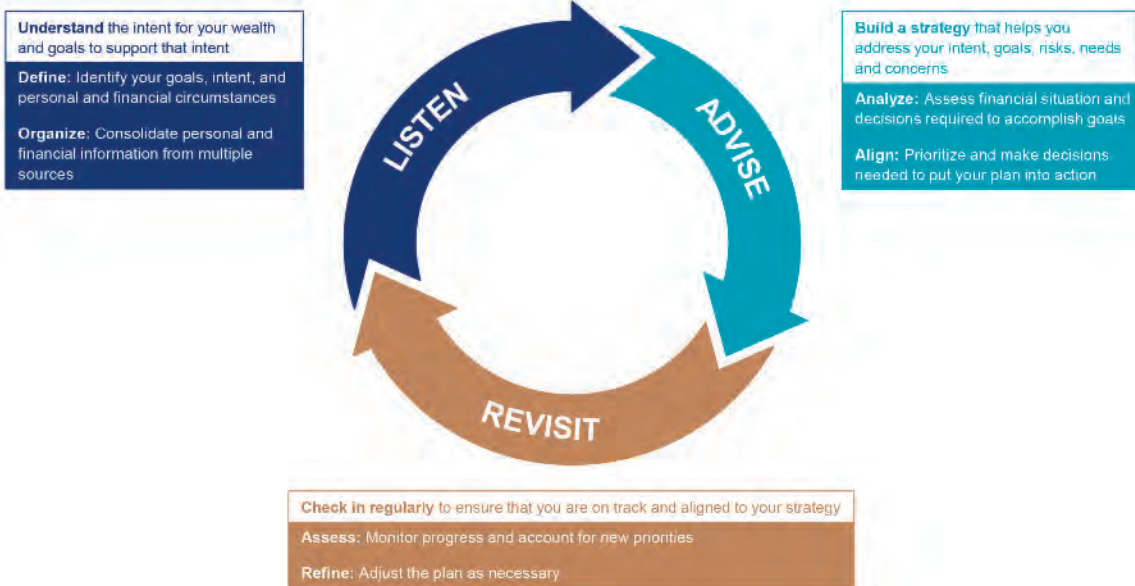
# Key Advice Themes

Elizabeth Hopkins  
Executive Director, J.P. Morgan Private Bank  
Richmond, Virginia

Chris Rodriguez  
Executive Director, Banker, J.P. Morgan Private Bank  
Washington, D.C.

Brandon A.S. Ross  
Executive Director, J.P. Morgan Private Bank  
Washington, DC

## Taking a goals-based approach to your wealth





## Planning considerations for 2023

- Review your portfolio:** Check that your wealth is still aligned with your ultimate goals and intent. Right size the amount of risk you're taking in each pool of capital and make any adjustments.
- Define your liquidity bucket:** With higher inflation and interest rates, be intentional with the amount of cash you hold and manage it efficiently (for operating cash, near-term large outlays, safety net, or "dry powder").
- Review life insurance policies:** Conduct a review to see whether any adjustments or additions are needed for existing policies. If you don't have life insurance, see if it would be beneficial for your wealth plan.
- Adjust to higher rates:** With rising interest rates, ensure any debt is aligned with your longer-term objectives and be aware of wealth transfer techniques that are affected by rising rates (e.g., intra-family loans, GRATs).
- Plan a family meeting:** Use your annual family meeting to educate the rising generation and discover topics they want to learn about.
- Remember the annual to-dos:** Make your annual gifts and retirement account contributions. The amounts for both are increased for 2023.
- Utilize lifetime exemption:** Gift up to the lifetime exclusion amount if you have the desire and capacity to do so. If you've already used your exclusion, you can top up another \$860K to the new amount.
- Be intentional with your charitable giving:** Prioritize your charitable goals and donate at the right time, using structures and funding sources that will best support your strategy.
- Look to be tax efficient:** Structure your finances with the right tax-efficient vehicles and strategies. If you are spending from your portfolio, expect to sell a business, or own a concentrated position, talk to your J.P. Morgan team about what would make sense for your situation.
- Be cyber safe:** Protect your finances and information by changing your passwords regularly, removing apps you don't use, and using multi-factor authentication.

KEY ANNUAL LIMITS/EXCLUSIONS FOR 2023

401(k) Contribution Limit	IRA Contribution Limit	Annual Gift Tax Exclusion	Gifts to Non-US Citizen Spouse	Estate, Gift & GST Tax Exclusions
\$22,500 by employee (\$30,000 if 50+), \$66,000 combined with employer (\$73,500 if 50+)	\$6,500 (\$7,500 if 50+), subject to phase-out	\$17,000/individual per donee (\$34,000/married couple)	\$175,000	\$12.92 million per donor \$25.84 million per married couple

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## How much cash do you need on hand?

There is no right or wrong answer, but you want to be intentional. Consider four main uses for liquidity that determine the level of cash you may need available.

 OPERATING CASH FLOW	 PSYCHOLOGICAL SAFETY NET	 LARGE CAPITAL EXPENDITURE	 OPPORTUNISTIC FUNDS
<p><i>Cash to cover day-to-day expenses for 1–5 years</i></p> <ul style="list-style-type: none"> <li>• What is your family's annual "run rate?"</li> <li>• How much cash do you need for essential and discretionary expenses?</li> <li>• Do you have a buffer included for the "one time" expense that typically pops up on an ongoing basis?</li> <li>• How liquid or illiquid are your longer-term investments?</li> </ul>	<p><i>The amount of cash that helps you sleep well at night</i></p> <ul style="list-style-type: none"> <li>• Do you have enough cash on hand to feel safe?</li> <li>• Does it allow you to comfortably weather market volatility, potential business interruptions or other uncertainties that are out of your control?</li> <li>• Is there a particular amount that would permit you to take prudent risk in the rest of your investment portfolio?</li> </ul>	<p><i>Cash earmarked for any large expenditures or financial commitments in the near term</i></p> <ul style="list-style-type: none"> <li>• Do you have any planned big purchases or outlays over the next 18 months, such as a real estate purchase, capital call or tax payment?</li> <li>• Are there any outsized inflows that you anticipate that could cover these outflows, or should distinct cash be set aside?</li> <li>• Are you flexible with the timing of these outlays or is their timing fixed?</li> </ul>	<p><i>"Dry powder" to take advantage of compelling investment opportunities that may arise</i></p> <ul style="list-style-type: none"> <li>• How much do you want to set aside as "dry powder" for timely investments should they appear?</li> <li>• Do you feel strongly about having actual cash for these investments or would access to liquidity through a line of credit be acceptable?</li> </ul>

## What should I consider when making withdrawals?

Understanding how to prioritize which accounts from which to draw assets first can be critical from a tax perspective

1 DEVELOP A SPENDING PLAN	3 SET A TAX-SMART WITHDRAWAL STRATEGY										
<ul style="list-style-type: none"> <li>• <b>Understand your spending needs and intent for your wealth:</b> Think about your lifestyle expenses and how these will change over time</li> </ul>	<ul style="list-style-type: none"> <li>• Optimizing withdrawal sequencing for tax efficiency usually depends on your tax status, age, whether you expect to pay lower taxes in the future, the types of assets you own, and your main objectives (e.g., minimizing current income taxes, funding charitable goals, minimizing income taxes or maximizing benefits for heirs)</li> </ul>										
2 DETERMINE YOUR FUNDING SOURCES	<p><b>Our general guidelines are:</b></p>										
<ul style="list-style-type: none"> <li>• <b>Non-portfolio income:</b> Social Security, pensions, annuities, rental income, deferred compensation, trust distributions, etc.</li> <li>• <b>Annual withdrawal target:</b> The amount needed to withdraw from your portfolio to bridge any gap between your spending amount and non-portfolio income</li> </ul>	<table border="1"> <thead> <tr> <th data-bbox="803 1522 1071 1543">If you are in the top tax bracket:</th> <th data-bbox="1112 1522 1388 1543">If you are not:</th> </tr> </thead> <tbody> <tr> <td data-bbox="803 1543 1071 1606"> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAKE RMDs</b>  <small>(as applicable, e.g., if older than age 72)</small> </div> </td> <td data-bbox="1112 1543 1388 1606"> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAKE RMDs</b>  <small>(as applicable, e.g., if older than age 72)</small> </div> </td> </tr> <tr> <td data-bbox="803 1606 1071 1669"> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAXABLE ACCOUNTS</b> </div> </td> <td data-bbox="1112 1606 1388 1669"> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAXABLE ACCOUNTS</b> </div> </td> </tr> <tr> <td data-bbox="803 1669 1071 1732"> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAX-DEFERRED ACCOUNTS</b> </div> </td> <td data-bbox="1112 1669 1388 1732"> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAX-FREE ACCOUNTS</b> </div> </td> </tr> <tr> <td data-bbox="803 1732 1071 1827"> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAX-FREE ACCOUNTS</b> </div> </td> <td data-bbox="1112 1732 1388 1827"> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAX-DEFERRED ACCOUNTS</b> </div> </td> </tr> </tbody> </table>	If you are in the top tax bracket:	If you are not:	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAKE RMDs</b>  <small>(as applicable, e.g., if older than age 72)</small> </div>	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAKE RMDs</b>  <small>(as applicable, e.g., if older than age 72)</small> </div>	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAXABLE ACCOUNTS</b> </div>	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAXABLE ACCOUNTS</b> </div>	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAX-DEFERRED ACCOUNTS</b> </div>	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAX-FREE ACCOUNTS</b> </div>	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAX-FREE ACCOUNTS</b> </div>	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>TAX-DEFERRED ACCOUNTS</b> </div>
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# Foundations of a sound estate plan

Have the estate planning essentials in place before addressing tax-efficient giving



1. HIPAA: Health Insurance Portability and Accountability Act.

## Different forms of ownership

Understand how your assets are owned and the options you have for joint accounts

<p><b>INDIVIDUAL</b></p> <p><b>One individual owns</b> this type of account. Assets are part of the individual's estate, and <b>subject to probate, and may be subject to estate tax at rates</b> prevailing in the year of the owner's death.</p>	<p><b>INDIVIDUAL WITH BENEFICIARY DESIGNATIONS</b> (e.g. IRA, 401(k), POD, TOD)</p> <p><b>Beneficiaries receive assets at the time of the owner's death without going through probate.</b> The percentage of assets each designated beneficiary receives can be pre-determined by original account holder. The named beneficiaries have no access to or control over a person's assets as long as the owner is alive. Entire value of the POD or TOD account would be included in the deceased owner's estate.</p>	<p><b>TRUST</b></p> <p>A person (the grantor) can transfer property to a <b>trust</b>. That property would be managed by a trustee for the exclusive benefit of two sets of beneficiaries: income, and remainder (or principal) beneficiaries.</p>	<p><b>COMMUNITY PROPERTY¹</b></p> <p>Property acquired by either spouse during the course of a marriage is generally considered owned <b>one-half by each</b> if acquired in a community property state, regardless of the name on the title itself. On the death of one spouse, the <b>entire value of the asset is stepped up to date of death value, but half the property passes under the terms of the decedent's Will</b> (or revocable trust).</p>
<p><b>COMMUNITY PROPERTY WITH RIGHTS OF SURVIVORSHIP</b></p> <p><b>When one spouse dies, the other will automatically own</b> the community property. <b>No probate</b> will be <b>necessary</b> to make the transfer. The process of transferring title to the surviving spouse would be simple.</p>	<p><b>JOINT TENANTS WITH RIGHTS OF SURVIVORSHIP</b></p> <p>All tenants (usually two) have an <b>equal right</b> to the account's assets and a survivor receives all of a co-tenant's interest in the event of a co-tenant death. Assets held as <b>JTWROS will pass that way, NOT pursuant to a Will</b>. If a married couple owns an asset as JTWROS, half the asset's value steps up to date of death value when a spouse dies. When one non-married co-tenant dies, he or she is presumed to own the entire value for estate tax purposes.</p>	<p><b>TENANTS IN COMMON (TIC)</b></p> <p>Co-owners who each own a <b>separate and undivided interest</b> in the same property and have an <b>equal right to the possession and use of the property</b>. <b>Upon the death of one tenant, the undivided interest passes to the co-tenant's beneficiaries under the decedent's Will</b>. A co-tenant can only sell or transfer his or her undivided interest; a purchaser or recipient should be clear on how much the co-tenant actually owns.</p>	<p><b>TENANTS BY ENTIRETY</b></p> <p>Rarely found in any context other than real estate. The <b>consent of both spouses is required</b> for one spouse to modify his or her TBE interest. When one spouse dies, the <b>surviving spouse gains full ownership of the property</b> (just like JTWROS).</p>

1. Community property states are Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, and Wisconsin. Alaska, Florida, Kentucky, Tennessee, and South Dakota may opt into a community property arrangement by funding a community property trust.

## Why consider life insurance?

Whether you want to protect your wealth for the future, business, family and loved ones, life insurance can help you maintain consistency and continuation towards your wealth goals.



### PROTECTION & PRESERVATION

Including life insurance as part of your financial plan can help maintain current needs and transfer wealth in the future by:

- Ensuring surviving family are taken care of through a guaranteed death benefit<sup>1</sup>
- Providing liquidity to help pay estate taxes, fund a buy-sell agreement or manage estate administration expenses
- Accelerating long term care benefits to help offset the cost of a covered long-term care event<sup>2</sup>

### IF YOU...

- Have a taxable estate
- Are a business owner
- Have a tax-aware investment strategy
- Are the primary income earner in your family
- Are seeking long-term care benefits<sup>2</sup>

### LIFE INSURANCE CAN HELP YOU...

- Craft a multi-dimensional estate plan
- Develop a succession plan for your business
- Plan for efficient wealth transfer
- Maximize tax benefits
- Secure liquidity for life events

<sup>1</sup> All guarantees expressed herein are based on the claims-paying ability of the issuing insurance company.

<sup>2</sup> Long-term care benefits may not be available with all life insurance products. Please refer to the policy documents of the life insurance policy you are considering for more information.

## How can I distill my family's values and define success?

Start communicating with your children about wealth through your family's values. Consider how these fundamental beliefs affect your decision making and what values you want to pass on to the next generation. Here are some questions that can hone your family's vision for the future:



### VALUES

What values define your own behaviors and goals?

What do you care about most?

What qualities do you wish to convey to future generations?

What principles should guide your collective behaviors?

What beliefs does your family represent?

How do you want your family to be known and remembered?

What is the purpose of your family's wealth? What results would you not want to see from wealth?



### SUCCESS

How you define success for yourself?

How would you define success as a family over multiple generations?

If everything goes exactly as you wish, in X years' time, what picture do you see?

What is your wealth doing for you?

How are you spending time?

What is the family doing?

Who would be overseeing the management of your family's wealth?

What words/descriptions come to mind?

Source: Family Governance: A Primer on Family Wealth Stewardship over Generations, J.P. Morgan, 2020.

## Transferring wealth to family: When is the best time for you?

With increased lifetime gift tax exclusion amounts for 2023, weigh the risks and opportunities of making substantial gifts during your lifetime versus after



### WEIGH THE QUANTITATIVE AND QUALITATIVE ASPECTS OF GIFTING

- **Quantitative:** Can I afford to give away substantial amounts during my lifetime?
- **Qualitative:** If I can, is it wise to do so?
  - Consider making a gift outright versus putting wealth in trust which can retain more control
- Consider giving in small chunks during life to see how the beneficiary uses these gifts



### KNOW THE ECONOMIC AND INVESTING BENEFITS

- Gifts made during life would not be subject to the 40% U.S. estate tax
- Invest assets earmarked for future generations to match their longer time horizon and potentially lower cash flow distribution requirements
  - Amplifies the efficiency of gifting during life to grow more over time, free from transfer taxes



### CONSIDER MARKET CONDITIONS

- Gifting during down markets can be more tax-effective
- Ensure you still have enough assets remaining after the gift to support your lifestyle
- Consider the future growth prospects of the gifted asset

## Key changes in limits/exclusions

Know the key numbers for 2023. With increased retirement account funding amounts, take advantage of their tax-deferral benefits. If you have the willingness and capacity to gift, consider using your lifetime exemption and topping up to the new amount.

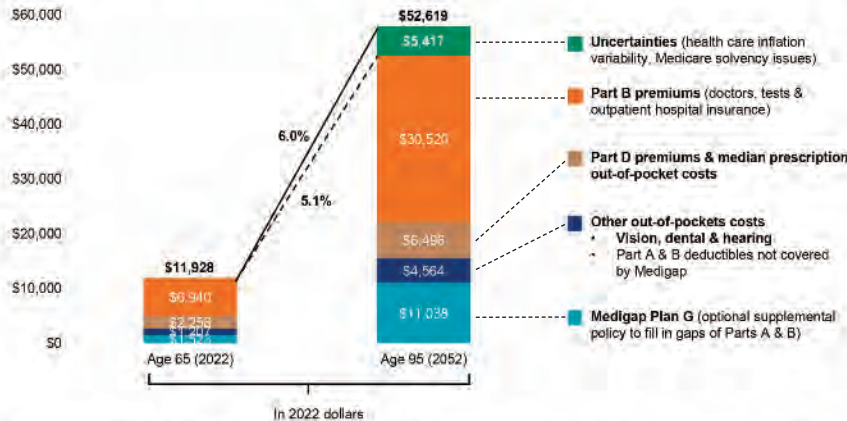
	2022	CHANGE	2023
<b>401(k) Contribution Limit</b>	\$20,500 by employee (\$27,000 if 50+) \$61,000 combined with employer (\$67,500 if 50+)	↑	<b>\$22,500</b> by employee ( <b>\$30,000</b> if 50+) <b>\$66,000</b> combined with employer ( <b>\$73,500</b> if 50+)
<b>IRA Contribution Limit</b>	\$6,000 (\$7,000 if 50+), subject to phase-out	↑	<b>\$6,500</b> ( <b>\$7,500</b> if 50+), subject to phase-out
<b>Required Minimum Distribution (RMD)</b>	IRS Life Expectancy Table changes reduce RMDs	↑	Age at which RMDs begin increases to 73
<b>Annual Gift Tax Exclusion</b>	\$16,000/individual per donee (\$32,000/married couple)	↑	<b>\$17,000</b> /individual per donee <b>\$34,000</b> /married couple)
<b>Annual Gift Tax Exclusion for Non-US Citizen Spouse</b>	\$164,000	↑	<b>\$175,000</b>
<b>Estate, Gift, &amp; GST Tax Exclusions</b>	\$12.06 million per donor (\$24.12 million/married couple)	↑	<b>\$12.92 million</b> per donor <b>(\$25.84 million/married couple)</b>

# Rising annual cost of health care in retirement

With rising health care costs and increased longevity, health care expenses are an important piece to prepare for in your overall wealth plan

## ANNUAL AMOUNT PER PERSON FOR ORIGINAL MEDICARE

Modified Annual Adjusted Gross Income of \$500k+ / \$740k+ filing single / jointly



For illustrative purposes only. Modified Adjusted Gross Income (MAGI) for purposes of calculating Medicare surcharges is Adjusted Gross Income (AGI) plus tax-exempt interest income. Today's dollar calculation used a 2.3% discount rate to account for overall inflation. Medigap premiums typically increase with age, in addition to inflation, except for the following states: AR, CT, MA, ME, MN, NY, VT, WA. For local information, contact the State Health Insurance Assistance Program (SHIP) <https://www.shiptacenter.org/>. Plan G premium is nationwide average for non-smokers. If Plan G is not available, analysis includes the most comprehensive plan available. Source: HealthView Services proprietary data file received January 2022 used by permission.

## A GROWING CONCERN

Annual expenses per person in 2022 were \$11,916.

Average life expectancy continues to increase and is a mid-point not an end-point. You may need to plan on the probability of living much longer – perhaps 35 years in retirement – particularly if you are a non-smoker in excellent health.

Given variation in health care cost inflation from year to year, it may be prudent to assume an annual health care inflation rate of 6.0%, which may require growth as well as current income from your portfolio in retirement.

## Key risks

- Investing in fixed income products is subject to certain risks, including interest rate, credit, inflation, call, prepayment and reinvestment risk. Any fixed income security sold or redeemed prior to maturity may be subject to substantial gain or loss.

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# The Well-Prepared Family

Your life details: A practical guide to information  
your family will need.





# Making your wishes and plans known will help ease your family's burden.

You know the value of managing your affairs well. That's why you should take the simple steps necessary to make it easier for your loved ones during a difficult time.

A wide range of issues will demand attention, so fill out as much of this record as possible.

Your J.P. Morgan team is available to help, and your other advisors also should be of assistance.

We recommend that you keep this document in a secure location, and let your loved ones and advisors know how to find it. You may also want to provide copies of this document to your advisors each time it is updated.

**Date completed (update annually)**

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**Names of those to whom you have provided a copy**

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# Essential

This information will be necessary for those who handle your affairs

### Personal information

Name	Date and place of birth
Primary residence	Country of citizenship
	Military # (country and time of service)
Social Security number	
Driver's license number	
Passport number	

### Key contacts

<b>SPOUSE/SIGNIFICANT OTHER</b>		<b>OTHER FAMILY MEMBER</b>	
Name		Name	
Relationship		Relationship	
Address		Address	
Phone		Phone	
Email		Email	
<b>OTHER FAMILY MEMBER</b>		<b>OTHER FAMILY MEMBER</b>	
Name		Name	
Relationship		Relationship	
Address		Address	
Phone		Phone	
Email		Email	

## Key contacts

### EXECUTOR(S)

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

### ESTATE PLANNING LAWYER

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

### ACCOUNTANT

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

### BANKER

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

### PRIMARY PHYSICIAN

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

## Estate planning

### WILL

Do you have one?  Yes  No

If yes, date it was most recently updated \_\_\_\_\_

Where is original located? \_\_\_\_\_

### POWER OF ATTORNEY WITH HIPAA LANGUAGE

Do you have one?  Yes  No

If yes, date it was most recently updated \_\_\_\_\_

Number and location of originals \_\_\_\_\_

### ESTATE DISPOSITION ANALYSIS

Do you have one?  Yes  No

If yes, date it was last updated \_\_\_\_\_

### REVOCABLE TRUST

Do you have one?  Yes  No

If yes, date it was last updated \_\_\_\_\_

Number and location of originals \_\_\_\_\_

Is it funded?  Yes  No

### LETTER OF WISHES

Do you have one?  Yes  No

If yes, date it was last updated \_\_\_\_\_

Number and location of originals \_\_\_\_\_

## Arrangements

### BURIAL PLOT INFORMATION

Location of deed \_\_\_\_\_

Is it paid for?  Yes  No

Location of information \_\_\_\_\_

Have perpetual care arrangements been made?  Yes  No

Location of information \_\_\_\_\_

Cremation container?  Yes  No

### FUNERAL HOME

Name of facility \_\_\_\_\_

Address of facility \_\_\_\_\_

Person to contact \_\_\_\_\_

Contact information \_\_\_\_\_



Your family tree

GRANDPARENTS	GRANDPARENTS
PARENTS	PARENTS
YOU	SPOUSE/SIGNIFICANT OTHER
CHILDREN (AND THEIR SPOUSES)	
GRANDCHILDREN (AND THEIR SPOUSES)	
OTHER	

### Financial records

TYPE	LOCATION	CONTACTS	
Individual Income Tax Returns			
Gift Tax Returns			
Life Insurance Policies			
Long-Term Care Policies			
Health Insurance Policies			
	LOCATION	KEY OR COMBINATION INFORMATION	CONTENTS
Safe Deposit Box			
Safe Deposit Box			

### Credit cards

CARD	ACCOUNT NUMBER	PRIMARY CARD OWNER	PHONE NUMBER	AUTOMATIC PAYMENTS SET UP FOR:

**Assets** If you need extra room, please use the blank pages at the end of this booklet.

**LIQUID FINANCIAL ASSETS (e.g., cash, stocks, bonds, alternative investments)**

Type of asset \_\_\_\_\_ Financial institution \_\_\_\_\_

Account number \_\_\_\_\_ Type of ownership \_\_\_\_\_

Contact name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Online account user ID \_\_\_\_\_ Password \_\_\_\_\_

Type of asset \_\_\_\_\_ Financial institution \_\_\_\_\_

Account number \_\_\_\_\_ Type of ownership \_\_\_\_\_

Contact name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Online account user ID \_\_\_\_\_ Password \_\_\_\_\_

Type of asset \_\_\_\_\_ Financial institution \_\_\_\_\_

Account number \_\_\_\_\_ Type of ownership \_\_\_\_\_

Contact name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Online account user ID \_\_\_\_\_ Password \_\_\_\_\_

**PRIVATE INVESTMENTS (e.g., limited or general partnerships, interests in limited liability companies, direct investments)**

Name \_\_\_\_\_ Description of entity \_\_\_\_\_

Ownership \_\_\_\_\_ Management \_\_\_\_\_

Personal banker name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Where governing documents can be located \_\_\_\_\_

Name \_\_\_\_\_ Description of entity \_\_\_\_\_

Ownership \_\_\_\_\_ Management \_\_\_\_\_

Personal banker name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Where governing documents can be located \_\_\_\_\_



**Assets** If you need extra room, please use the blank pages at the end of this booklet.

**RETIREMENT ASSETS** (e.g., pensions, deferred compensation plans, group life insurance policies, 401(k) account, IRAs, company stock, options)

Type of asset \_\_\_\_\_ Company \_\_\_\_\_

Contact name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Online account user ID \_\_\_\_\_ Password \_\_\_\_\_

Type of asset \_\_\_\_\_ Company \_\_\_\_\_

Contact name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Online account user ID \_\_\_\_\_ Password \_\_\_\_\_

Type of asset \_\_\_\_\_ Company \_\_\_\_\_

Contact name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Online account user ID \_\_\_\_\_ Password \_\_\_\_\_

**COMMERCIAL REAL ESTATE**

Address \_\_\_\_\_ Address \_\_\_\_\_

Description of ownership \_\_\_\_\_ Description of ownership \_\_\_\_\_

Description of management \_\_\_\_\_ Description of management \_\_\_\_\_

Type of ownership \_\_\_\_\_ Type of ownership \_\_\_\_\_

Insurance agent name \_\_\_\_\_ Insurance agent name \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

**RESIDENTIAL REAL ESTATE**

Address _____		Address _____	
_____		_____	
Location of deeds _____		Location of deeds _____	
Mortgage information _____		Mortgage information _____	
Caretaker information _____		Caretaker information _____	
Alarm code _____		Alarm code _____	
Who has keys? _____		Who has keys? _____	
Insurance agent name _____		Insurance agent name _____	
Phone _____	Email _____	Phone _____	Email _____

**PERSONAL ASSETS (e.g., cars, art or other collectibles, aircraft, boats)**

Type of asset _____	Location _____	
Insured? If so, insurer name _____	Phone _____	Email _____
Appraised? If so, appraiser name _____	Phone _____	Email _____
Other key contacts _____	Safe combination? _____	

Type of asset _____	Location _____	
Insured? If so, insurer name _____	Phone _____	Email _____
Appraised? If so, appraiser name _____	Phone _____	Email _____
Other key contacts _____	Safe combination? _____	

Type of asset _____	Location _____	
Insured? If so, insurer name _____	Phone _____	Email _____
Appraised? If so, appraiser name _____	Phone _____	Email _____
Other key contacts _____	Safe combination? _____	



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# Supplemental

Provide additional help to your family with these details

**Notifications** If you need extra room, please use the blank pages at the end of this booklet  
**Call List: Family/Friends/Professional Advisors/Business Contacts**

NAME	PHONE	EMAIL	NOTES

**Communications**

Identify Person(s) to Handle:

Calls coming to home \_\_\_\_\_

Mobile phone \_\_\_\_\_

Donation requests \_\_\_\_\_

Reply cards \_\_\_\_\_

House visitors \_\_\_\_\_

**Obituary**

Have you prepared an obituary and chosen a picture?  Yes  No

Should the obituary name organizations for charitable donations (in lieu of flowers)?  Yes  No

If yes:  
 Name(s) of organization(s) \_\_\_\_\_  
 \_\_\_\_\_

Contact information \_\_\_\_\_  
 \_\_\_\_\_

Person(s) to contact \_\_\_\_\_  
 \_\_\_\_\_

**WRITTEN ANNOUNCEMENTS**

**Media Outlet**

Organization \_\_\_\_\_ Contact name & phone \_\_\_\_\_

Instructions \_\_\_\_\_

Person handling \_\_\_\_\_ Writer \_\_\_\_\_

**Media Outlet**

Organization \_\_\_\_\_ Contact name & phone \_\_\_\_\_

Instructions \_\_\_\_\_

Person handling \_\_\_\_\_ Writer \_\_\_\_\_

**Media Outlet**

Organization \_\_\_\_\_ Contact name & phone \_\_\_\_\_

Instructions \_\_\_\_\_

Person handling \_\_\_\_\_ Writer \_\_\_\_\_

**Charity/Association/Group**

Organization \_\_\_\_\_ Contact name & phone \_\_\_\_\_

Instructions \_\_\_\_\_

Person handling \_\_\_\_\_ Writer \_\_\_\_\_

**Charity/Association/Group**

Organization \_\_\_\_\_ Contact name & phone \_\_\_\_\_

Instructions \_\_\_\_\_

Person handling \_\_\_\_\_ Writer \_\_\_\_\_

**Arrangements** If you need extra room, please use the blank pages at the end of this booklet.

**BURIAL OR CREMATION**

**If Burial:**

Casket preference  Metal  Wood

Other specifications: \_\_\_\_\_

\_\_\_\_\_

Burial container?  Yes  No

Grave or mausoleum?  Yes  No

**Location of Funeral:**

Place \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Contact \_\_\_\_\_

Phone \_\_\_\_\_

**If Cremation:**

Urn preferences \_\_\_\_\_

\_\_\_\_\_

Urn engraving?  Yes  No

Cremation jewelry?  Yes  No

Candlelight ceremony?  Yes  No

**Clothing Specifications (if burial):**

\_\_\_\_\_

\_\_\_\_\_

**Police Escort and Security?**  Yes  No

If yes, details and contact information \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Do You Want:**

Rosary?  Yes  No

Wake/Viewing?  Yes  No

Live broadcast for those who cannot make the trip?  
 Yes  No

Prayer cards?  Yes  No

Verse for card \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**HEADSTONE DETAILS**

Name as it should appear \_\_\_\_\_

\_\_\_\_\_

Is there a message?  Yes  No

If yes, how should message read? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is there an image?  Yes  No

If yes, specify \_\_\_\_\_

\_\_\_\_\_

**FUNERAL/BURIAL**

Cemetery contact	Program
_____	_____
_____	_____
_____	_____
Officiant	Music for service
_____	_____
Eulogists	Ushers for service
_____	_____
_____	_____
_____	_____
Pallbearers	_____
_____	_____
_____	_____
_____	_____
_____	Person(s) handling guest book
_____	_____
_____	_____
_____	Family transportation information
_____	_____
_____	_____
Flowers	_____
_____	_____
_____	Person to invite those attending burial
_____	_____
_____	Graveside officiant (if different)
_____	_____

**Post-funeral gathering**

Location \_\_\_\_\_ General instructions \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Person(s) handling invitations \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Personal and professional affairs**

Mobile phone provider \_\_\_\_\_  
 Password \_\_\_\_\_

Execute release form?  Yes  No

EMAIL ACCOUNTS/WEBSITE/ DIGITAL SERVICE/SOCIAL MEDIA	YOUR USER ID	YOUR PASSWORD	EXECUTE RELEASE FORM?
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

**MEMBERSHIPS**

Club/Gym/Group names \_\_\_\_\_ Membership number (if applicable) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



**INSTRUCTIONS REGARDING HOUSEHOLD/BUSINESS EMPLOYEES**

Employee's name/position	Employee's name/position
_____	_____
_____	_____
Contact information	Contact information
_____	_____
_____	_____
Continued employment?	Continued employment?
_____	_____
Severance amount?	Severance amount?
_____	_____
_____	_____
Employee's name/position	Employee's name/position
_____	_____
_____	_____
Contact information	Contact information
_____	_____
_____	_____
Continued employment?	Continued employment?
_____	_____
Severance amount?	Severance amount?
_____	_____
_____	_____
Employee's name/position	Employee's name/position
_____	_____
_____	_____
Contact information	Contact information
_____	_____
_____	_____
Continued employment?	Continued employment?
_____	_____
Severance amount?	Severance amount?
_____	_____
_____	_____



**Additional information**









# Important information

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THE WELL-PREPARED FAMILY

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LIFE EVENTS CHECKLIST SERIES: PLANNING A FAMILY MEETING

# Your guide to successful family meetings

Family meetings are a wonderful way to foster communication and advance collective goals. With careful planning, these sessions also can become a meaningful complement to a family holiday gathering or celebration.

Consider these best practices to make your meetings more productive—and to help avoid emotional pitfalls that sometimes get in the way:



## Before the meeting

**Create an agenda and identify attendees**

Think through your agenda in advance of the meeting to help determine who should attend. For example, if you plan to include topics of interest to all family members (e.g., cybersecurity), you may also want to invite family members' spouses and children. Conversely, if you plan to focus solely on business, investment and/or philanthropic strategies, your invite list may be smaller. After you've identified attendees, it may be helpful to survey the group anonymously to understand what questions are top of mind in order to tailor the agenda accordingly.

**Set expectations**

Help family members understand what you hope to accomplish by bringing them together. It's also important to cover logistics for the meeting, such as how much time will be involved, who will be invited, expectations of involvement, who will cover travel costs, etc.

**Share the agenda in advance**

Alert family members as to what a given meeting will cover to help them arrive ready to participate, including any materials that need to be reviewed in advance. Many families use these sessions to:

- Provide important updates about the health and well-being of family members
- Celebrate important milestones
- Report on the status of family assets
- Educate (younger) family members—for example, on financial and investment principles, cybersecurity practices, basic estate planning techniques
- Discuss the future direction of family assets, philanthropic commitments, investments or banking activities

**Consider a facilitator and/or guest speaker(s)**

To navigate a discussion on certain topics, a non-family member may moderate the meeting and assist with any needed mediation, keep the meeting on track and allow everyone to be heard. Including guest speakers also helps to bring in outside perspectives.

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## At the meeting

### **Announce the ground rules at the outset**

Set simple ground rules to keep the meeting on track. For example, you might ask participants not to use their cell phones during the meeting; to listen respectfully to each other and to avoid interruptions and personal attacks. It can also be helpful to clarify which subjects will be addressed during the session and which, if any, will not be covered (e.g., political views). You might also ask for the group's commitment to end the meeting on time.

### **Encourage participation**

Create a welcoming environment in which everyone recognizes they have a stake in the proceedings:

- Ahead of time, ask others to lead certain conversations or topics
- Actively support everyone's right to be heard—Getting even a small contribution from every participant will help foster a sense of community and help win commitments to whatever plans emerge. Having a moderator who can call upon family members who might not be as forthcoming in sharing opinions or views, or having small breakout sessions and then sharing as a larger group can be a way to support this in larger families
- Invite each person (whether young or old; financially savvy or uninformed) to take part in the discussion and/or ask questions

### **Sidestep conflicts**

This is especially important in families whose members are known to hold divergent views:

- Pick topics carefully—It may not be worth trying to discuss issues the family is unlikely to agree on. (Note: A family meeting is unlikely to change anyone's personal views or opinions)
- Emphasize shared values and principles—Acknowledge what the family has in common to help guide the conversation
- Agree to disagree—Removing the urge to complete a debate can help participants move on to other topics

### **Focus on building trust**

It's great to build consensus, but it's equally important to instill faith in family leaders as well as in the stewardship process itself. Keep in mind that trust is built on having others' best interests at heart, honesty and transparency, and competence.



## Prepare for the next meeting

### **Sustain momentum**

Determining next steps can be almost as important as the meeting itself:

- Designate a note taker to capture important details; share the written notes and any plans that were made to avoid misunderstandings
- Agree on next steps, and assign an "owner" to each to ensure accountability
- Break follow-up commitments into manageable pieces to avoid overwhelming individual participants
- Schedule your next meeting prior to adjourning, and provide a timeframe/key dates so family members can plan their next contributions
- Check in with family members to obtain candid feedback on what could make the meeting more effective going forward
- Consider polling family members in advance for topics they want to see addressed in the future to optimize family engagement
- End the meeting with a fun activity or informal meal. Most successful family meetings include an opportunity for members to bond in a relaxed setting



## We can help

J.P. Morgan has helped countless families cultivate shared values and reach important goals through productive family conversations. Speak to your J.P. Morgan team about how to help your family members enhance their communication skills and work better together in the years ahead.

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**II.**

**Therapeutic Interlude 1**

**Navigating the Stress  
of Running a Small Law  
Practice**

**Hetal Challa**



# A Solo-Practitioner's Toolbox: Healthy Habits to Build a Successful Legal Practice

Hetal Challa

Wellness Coordinator, Supreme Court of Virginia

**Summary:** Having your own practice has advantages of freedom and flexibility. However, for some attorneys, working independently can lead to feelings of isolation and being overwhelmed. This presentation will focus on building a structured framework and developing tools to ensure a healthy, happy, and prosperous career as a solo practitioner.

## I. General Wellness Overview

- a. Statistics regarding Mental Health and Substance Use in the Legal Profession (Hazelden Betty Ford Foundation with the American Bar Association)
  - 21 – 36% qualified as problem drinkers.
  - 14% reported that problematic drinking began in law school.
  - 28% were experiencing some level of depression.
  - 11% had experienced suicidal thoughts.
  - ALM's Mental Health and Substance Abuse Survey – self report (2020)
  - 74% said the legal profession has had a negative effect on their mental health over time.
  - 56% said mental health problems and substance abuse are worse in the legal industry than in other industries.
  - 41% said mental health problems and substance abuse are at a crisis level in the legal industry.
  - 17.9% said they have contemplated suicide during their professional legal career.
  - 31.2% said they are depressed.
  - 64% said they have anxiety.
  - 10.1% said they have an alcohol problem; and
  - 2.8% said they have a drug problem.
- b. "Stress, Drink, Leave" (2021) Study (survey of almost 3,000 lawyers in CA and DC)
  - Found levels of mental health problems and problematic drinking to be *high among practicing lawyers* generally.
  - Found women attorneys have a *higher prevalence and severity* of depression, anxiety, stress, risky and hazardous drinking, and attrition compared to their male counterparts.

- *Overall findings:* 28% of the lawyers reported symptoms of depression; 23% maladaptive stress; 21-36% engage in hazardous drinking
- *More on alcohol:* Over 80% of all the lawyers sampled reported being current drinkers (10% higher than general population); 30% screened positive for high-risk hazardous drinking; only 2% reported being diagnosed with an alcohol use disorder.

1. Women attorney findings: 56% engaged in risky drinking behavior; 34% were high-risk or hazardous drinking (c.f., 46% of men engaged in risky drinking; 25% were high-risk or hazardous drinkers).
2. Note: 34.6% of the women and 29.2% of the men reported that their drinking has increased during the pandemic. Women who reported an increase in drinking were seven times more likely to engage in risky drinking (men were nearly four times more likely).
3. Implications: gender disparity; under-diagnosis and treatment

- *Attrition:* 25% of women contemplated leaving the profession due to mental health concerns, compared with 17% of men (note: a significantly higher proportion of male attorneys were in senior positions).
- The study also looked beyond prevalence data; it looks at the predictors of those factors that have been shown to negatively impact the legal profession. Women's responses demonstrated a greater level of effort needed to elicit reward at work when compared with men, significantly higher levels of over-commitment and work-family conflict, and a lower likelihood of promotion.

c. History of the task force and publication of reports:

- *A Profession at Risk: Report of the Committee on Lawyer Well-Being of the Supreme Court of Virginia*  
The Report of the Committee on Lawyer Well-Being of the Supreme Court of Virginia, which contains recommendations for the structure, funding, and priorities of the Virginia Lawyers' Wellness Initiative.
- *The Occupational Risks of the Practice of Law*  
The Report of the Virginia State Bar President's Special Committee on Lawyer Well-Being examines twenty risks unique to the legal profession (including physical, mental & emotional, adaptation, and self-actualization risks) and includes practice pointers for individuals and organizations to ameliorate these risks. (See Updated from 2022)
- *The Path to Lawyer Well-Being: Practical Recommendations for Positive Change*  
This report, from the National Task Force on Lawyer Well-Being, served

as the genesis for the Supreme Court of Virginia report. It includes national statistics on the lack of well-being in the legal profession and offers concrete, actionable recommendations to improve this issue.

d. Key Report recommendations:

- Hiring of a Wellness Coordinator, as part of the Virginia Lawyer Wellness Initiative, to manage state-wide wellness initiatives.
- The expansion of the Virginia Judges and Lawyers Assistance Program (VJLAP), to include funding for education and outreach.
- Increased education and support for law schools
- CLE requirements expanded to include wellness topics
- Amendments to Character and Fitness applications for law students to destigmatize mental health and substance abuse disorders
- The definition of competency under Rule 1.1 was expanded to include the mental and physical health of an attorney as being inseparable from the duty of an attorney in maintaining competence to practice.
- Dimensions of wellness-the Report, *A Profession at Risk*, recommends that attorneys refer to the dimensions of wellness and ultimately strive for making gradual progress in each area.
  1. Physical
    - a. Find ways to move more
    - b. Working walks
  2. Social
    - a. Prioritize friendships and family
    - b. Schedule recurring dates with friends other than work colleagues
  3. Occupational
    - a. Find meaning in your work, revisit your “why” for pursuing the law
    - b. Do pro bono work, volunteer
  4. Intellectual
    - a. Maintain your reading habits, including, but not limited to the law.
    - b. Find alternative outlets to motivate you intellectually
  5. Spiritual
    - a. Find support spiritually in whatever means comfortable to you. This is very individual and could include attending church or specific institution.
    - b. Meditation and mindfulness practice



- 6. Emotional
  - a. Monitor how you are feeling emotionally
  - b. Seek support and share your emotions, whether this is with a friend, therapist, or VJLAP. Early intervention is key.
- *The Occupational Risks of the Practice of Law*
  - Identification of 20 inherent risks of practice, which were broken down into a digestible matrix.
    - Physical Risks
    - Mental and Emotional Risks
    - Adaptation Risks
    - Self-Actualization Risks
- *The Occupational Risks of the Practice of Law*, Update June 2022 and due to the pandemic, there were additional risks identified.
  - Individual Work
  - Changing Legal Paradigms
  - Lack of Diversity in the Legal Profession.

MENTAL AND EMOTIONAL RISKS			
Risk Description	Potential Effects	Practice Pointers for Individuals	Practice Pointers for Organizations
Individual Work	The individual nature of a lawyer's profession can lead to feelings of isolation. In fact, legal work in general has been considered the loneliest kind of work. The COVID-19 pandemic only exacerbated the loneliness problem by preventing in-office and in-person social interactions while increasing lawyers' stress.	<ul style="list-style-type: none"> <li>• Proactively reach out to colleagues, even if working from home.</li> <li>• If feasible, go into the office several times a week to maintain relationships.</li> <li>• Go outside for your lunch break.</li> <li>• Intentionally schedule participation in bar association activities, conferences, and seminars.</li> <li>• Proactively schedule social time with friends and family.</li> </ul>	<ul style="list-style-type: none"> <li>• Recognize the importance of facilitating professional relationships and adjust office-attendance policies accordingly.</li> <li>• Develop a system to maintain regular contact with employees working from home to monitor their well-being — not to surveil them.</li> <li>• Redouble efforts to provide mentorship programs recognizing that prevalent work-from-home schedules inhibit professional interaction.</li> <li>• Create an environment that facilitates serendipitous interactions.</li> </ul>

<b>ADAPTATION RISKS</b>			
<b>Risk Description</b>	<b>Potential Effects</b>	<b>Practice Pointers for Individuals</b>	<b>Practice Pointers for Organizations</b>
Changing Legal Paradigms	In addition to disruption caused by the digital revolution, pandemic-era innovations like working from home and the rise of videoconferencing have created new challenges for lawyers, including home office syndrome (stress and exhaustion associated with blurred boundaries between work and home life) and Zoom fatigue (burnout associated with overuse of virtual communication platforms).	<p><b>Home Office Syndrome</b></p> <ul style="list-style-type: none"> <li>• Cultivate psychological boundaries between “work” and “home.”</li> <li>• Create dedicated work spaces.</li> <li>• Establish fixed start and end time for workday.</li> <li>• Follow a routine to replicate the rhythms of an in-office work day.</li> <li>• Wear different clothing for work and home time.</li> <li>• Establish routine that helps you transition from home mode to work mode, and vice versa.</li> </ul> <p><b>Zoom Fatigue</b></p> <ul style="list-style-type: none"> <li>• Avoid videoconferencing in full-screen and instead use a smaller window relative to the monitor size.</li> <li>• Maintain distance from screen and web cam.</li> <li>• Avoid multitasking and build in breaks for longer video calls.</li> <li>• Build in breaks for longer videoconferences.</li> <li>• Use speaker only view.</li> <li>• Appoint facilitator to run virtual meetings.</li> <li>• Avoid continuous use of videoconferencing by employing mix of communication methods (phone calls, emails, in-person conversations).</li> <li>• Use the 20-20-20 rule—focus on something 20 feet away for 20 seconds every 20 minutes of screen time.</li> </ul>	<p><b>Home Office Syndrome</b></p> <ul style="list-style-type: none"> <li>• Promote an organizational culture that encourages separating work from home, such as by permitting attorneys to turn off phones and computers after hours.</li> <li>• Provide those working from home with the resources they need to succeed, like standing desks, multiple monitors, blue-light/computer glasses, and laptop docks.</li> <li>• Implement software to minimize harms from extended use of screens.</li> <li>• Encourage in-person meetings when safe, including meetings outdoors.</li> </ul> <p><b>Zoom Fatigue</b></p> <ul style="list-style-type: none"> <li>• Implement software to minimize harms from extended use of screens.</li> </ul>

<b>LACK OF DIVERSITY IN THE LEGAL PROFESSION</b>			
<b>Risk Description</b>	<b>Potential Effects</b>	<b>Practice Pointers for Individuals</b>	<b>Practice Pointers for Organizations</b>
Lack of Diversity in the Legal Profession	Diverse and inclusive working environments foster lawyer wellness. A lack of diversity, however, can lead to isolation, a sense of exclusion, and ultimately poor performance and a lack of autonomy. The COVID-19 pandemic caused a mass transition to remote work, leaving many diversity initiatives behind.	<ul style="list-style-type: none"> <li>• Intentionally seek out colleagues with different backgrounds, particularly when working remotely or in times of limited office exposure.</li> <li>• Consider implicit biases and how working from home may have changed or exacerbated them.</li> </ul>	<ul style="list-style-type: none"> <li>• Consider diversity when establishing remote work policies to ensure diverse employees have opportunities to participate even if not in the office.</li> <li>• Evaluate organizational priorities as altered by pandemic disruption and reassess the role of diversity in organizational goals and culture.</li> <li>• Virtual communications should be evaluated to ensure diverse participation, not only as to attendees but also as to organizers and presenters.</li> </ul>

## II. Solo-Practice Wellness 101

### 1) Get prepared

#### a) Educational resources and books

- How To Start & Build A Law Practice by Jay G. Foonberg
- Law Office on A Laptop by Catherine Hodder, Esq., and Kelly c. Sturmthal, Esq.
- Contact your law school for resources and mentors
- American Bar Association Solo and Small Firm Resource Center

#### b) Learn technology

- Utilizing technology may require a time investment in the short-term. However, it will save you time as your practice grows.
- Consider tools which help with document automation to save time drafting pleadings, intake forms.
- Take time to perfect your process.

#### c) Consider investing in an online practice management software such as Clio.

### 2) Be selective in accepting cases

- When you are building a business, it is tempting to accept all types of cases to make money. However, remember that taking too many cases that you cannot handle, in the long run, may be self-defeating.
- Make time to network with other attorneys. You will learn some tips, and maybe gain some referrals.

### 3) Hire well

- Consider getting a law school intern if you cannot afford to hire someone right away.
- As your firm grows, you will need quality help. Resist the urge to hire the first person you interview. Think about what tasks would help you the most and hire the right fit for the position.
- Make sure you define the role of your hire with specificity to ensure that the new hire is aware of what you need.

### 4) Mentorship and social connections

- Find a mentor you respect in a similar practice area and shadow them. Contact your law school for a list of alumni in your area.
- Social connects are vital for both your professional development and maintaining the social dimension of wellness.
- Increased social connections are tied with extended longevity

### 5) Wellness concerns for solo practice attorneys According to a study by the American Bar Association, poor work/life balance is the number one reason why attorneys leave their practice. While it is advantageous to have flexible work hours when you work for yourself, many business owners (especially in the first 5 years of solo practice) report working during weekends, and more than 40 hours per week. This can lead to burnout.

- Put yourself first. Treat yourself as a client and schedule time for self-care. While it may seem as if you do not have time, making time for self-care can make you more efficient when you work and increase the chance that you will not burn out. Short and frequent breaks keep you refreshed and energized. Remember that you cannot be a good advocate for your clients if you are tired and unwell.
- Set an intention to move more and remember that every little bit counts. Even if you do not have time for a formal 30–60-minute workout, start small by prioritizing any movement that you can fit in. Add more time as you are able and add this in incrementally. Many people find that they are more productive after exercising. It also helps with sleep quality.
- Take regular breaks-Every 30 minutes of staring at a computer screen or device, prioritize taking a 15- minute break from staring at a computer screen and rest your eyes.
- Prioritize getting at least 7 or more hours of sleep. Develop good sleep hygiene.
  - Implement nightly rituals which are relaxing. Examples could include a warm bath or shower, relaxing music, reading, lighting a candle, meditation, etc. Developing consistent sleep hygiene habits will signal your brain that it is time to unwind.
  - Avoid electronic devices before bedtime.
  - Avoid working right before bedtime, especially if it involves sensitive material.

## III. Solo-Practitioner Resources

- a. Early intervention is key-find support before work product begins to decrease

- Don't ignore signs of impairment.
- Take note of any small changes in work product, demeanor, and mood.
  1. Keep communication lines open
  2. Seek support from friends, family, and colleagues
  3. Consider therapy. As a legal society, we must destigmatize help seeking behaviors.
- b. Contact the Virginia Judges and Lawyers Assistance Program (VJLAP)
  1. VJLAP is a non-profit, non-disciplinary, free, confidential service dedicated to serving attorneys and their families.
  2. They are comprised of therapists and attorneys who are licensed and trained to assist legal professionals.
  3. This is an independent organization from the Virginia State Bar and the Supreme Court of Virginia.
  4. Contact them 24 hours a day at 1-877-545-4682 or go to [www.vjlap.org](http://www.vjlap.org)
- c. The Virginia Lawyers Wellness Initiative (VLWI)
  - [Educational Services: Virginia Lawyers' Wellness Initiative \(vacourts.gov\)](http://vacourts.gov)
  - Wellness Coordinator, Hetal Challa ([hchalla@vacourts.gov](mailto:hchalla@vacourts.gov))
- d. Virginia State Bar, wellness editorials, *The Virginia Lawyer*
  - [Lawyer Wellness \(vsb.org\)](http://vsb.org)

**III.**

**Wellness Strategies  
for Balancing the Practice  
of Law with the Stress of  
Representing Clients**

**Raymond M. White**

**PJ McIlvaine**

**Mac Keever**



# Stress and the Practice of Law: The Power to Make a Change

Raymond M. White  
V.I.S.T.A Volunteer, Lawyer, Editor, Publisher, Businessperson,  
and Executive Director of Virginia Law Foundation

Does any of this sound familiar?

I have nightmares about letting statutes of limitations run.  
My loved ones say they don't see me enough.  
My firm says they don't see me enough.  
I'm not billing enough hours.  
I have so many bills to pay I can't even remember the due dates anymore.  
My student loans are endless.  
Will I ever be able to buy a house? Have a family?  
I worry for my clients.  
I worry about my clients suing me.  
Do I try to act confident when I don't feel competent?  
I'll never get all my work done.  
I feel like the ship is sinking.  
I don't need to drink.  
I'm not who I used to be.  
I'm not sure who I am anymore. What has happened to me?  
I want my life back.  
I can fix this myself. I'll be fine.  
Okay, I may need some help with this. I'll think about it tomorrow.

If any of this sounds familiar you're in the right place; welcome to the Virginia Law Foundation's inaugural Wellness Institute where in the words of Billy Joel, "tomorrow is today."

While none of us can walk in each other's shoes entirely, this is a place where people who have lived lives that perhaps rhymed with yours are here to share what helped them – and what didn't. That includes me, as over the course of my career as a lawyer, that started in 1981, the days before copying machines, word processing, and pretty much before electricity, many of these thoughts ran through my head and those of my friends and colleagues.

To be perfectly candid, some friends made it; others tragically did not. But we're all a work in progress where the solution is more in reach than you may think. And if now, if here, if today, you're open to re-viewing and perhaps reevaluating your priorities and direction, wellness will never be out of reach.

This review and reevaluation involve drawing out from our systems as much stress as possible as if it were venom from a snakebite. It starts with looking in the mirror and seeing if you recognize who's looking back. Think of you from an earlier time; an easier time; a time when perhaps you had less money but perhaps fewer worries. If you don't recognize that person in the mirror then let's get to work.

Maybe it's time for a more holistic change. Maybe you need to change what you're doing every day. Or maybe you just need to change how you do it. Or where you do it.

During this reevaluation we'll help you make sure you have a plan to be on sound financial ground, can recalibrate to a work/life balance that will help you feel more complete, and recognize the comfort that comes from losing yourself in a creative process, especially as it relates to the healing powers of writing and music.

We'll take a long look at what it will take for you to make a fresh start; one that frees you from preconceived notions of how you need to spend your days (especially since they may not even be your idea of how to spend your days).

Even with all our differences, we've all ended up in the same place at the same time for the same reason. I've charted my journey below with the hope it will perhaps help to see the roads I traveled to get here. There were a lot of them. Some roads I had to travel twice. That's okay. The evacuation route is not always clearly marked. During that process I had to learn to forgive myself for every wrong turn; the roads to better journey are rarely in a straight line.

But every road brings with it a lesson all its own, and I'll share the ones I've learned. Hopefully these lessons shared will bring some comfort and clarity to you so can chart your journey as it has led to the choice of roads before you.

It's easy to take the interstate. Especially if you're already on it. It's fast and predictable. A lot of people take them even though there are few places to see or get off. Most all look the same. They are a look in and of themselves – and if that's all we knew of life it would seem drab and depressing.

Another option, one that takes a little more work and planning, are Robert Frost's roads less traveled. As William Least Heat Moon called them, the blue highways. In a simpler time they were the roads more traveled but somehow simpler times often give way to expedience. Speed. The need to go further, faster. These roads pass through towns you'll never see from the interstate. Places where people live, shops with character, farms where nine to five means five to nine. Parades, restaurants, diners, and coffee shops that aren't chains, soccer fields and town squares. Blue highways take us places we'd never see from the interstate. A speedy BMW doesn't do as much good on these roads. There are often speed traps but sometimes the message of a speed trap is a good one – slow down and look around before it's too late.



Above all what I want you to feel in your heart and in your mind as you leave Wolf Trap on Saturday is that the next road you choose is up to you. It may even be your road home.

## A Case Study – ME

When I started law school in 1977, I had no idea what it meant to be a lawyer. What it involved. The satisfaction that comes from doing important work, or the many stresses that can easily overwhelm that sense of satisfaction.

But as I progressed through school and failed to heed the lessons of *The Paper Chase* (after all I was not nearly smart enough to go to Harvard law school so that's not me) I felt I could best make my way as a trial lawyer. The closest I got to law prior to school was lawyer shows on TV and trials were the bright shiny object. That would be me.

Unfortunately, the data was not as developed then as it is now regarding the strain the legal profession places on lawyers – not just the ones who attended Harvard.

I had no way of knowing trial lawyers were far more likely to abuse alcohol or drugs, have serious bouts of anxiety and depression, and were 22 more times likely to contemplate taking their own lives than people outside law practice. The only way I learned that was by seeing friends and colleagues tragically fall into the desperate depths of despair that law practice can and did bring.

I was told that the best way to get experience as a trial lawyer was as a prosecutor. Trials came quickly and no clients will suffer due to my inexperience (only the safety of the public at large, apparently). So, after a stint of giving back as a VISTA volunteer, the next stage of my legal career was as a prosecutor. Assigned to the grand jury division, then the felony trial division, and finally the major crimes division, from day one I was handling serious matters. High stakes work, but no clients per se – other than the people of the state, but they never showed up to sit beside me. I had a team of investigators and multiple police forces to help with subpoenas and investigations and witness statements. All I had to do was know my case, hone my trial skills, and seek fair and just adjudications whether via plea or jury verdict.

Then came a time when I was invited to join a prominent firm and without doing any due diligence, I proudly accepted. I felt it was time. I had learned trial work and didn't think I could be a prosecutor forever.

So now it was time to add civil work to criminal work. I had no idea what was to come. First there were clients. I did not at all understand that dynamic. I watched defense attorneys sit with clients, counsel clients, try cases with clients right next to them – some with files twice as thick as theirs. I saw it but I did not understand.

And then there was the work – I could do a criminal trial in my sleep (some would probably say I did) but civil cases? What were they? Matrimonial? Personal Injury? Employment discrimination? These

were real live people coming to see me with real problems that they were hoping I could help solve.

I had to play a lot of catch up with the written rules for these practice areas and had no idea that there even were unwritten rules. At my first deposition opposing counsel asked, ‘the usual stipulations?’. I said yes if they were usual then everyone must do them, right? The only problem was that I had to figure out what they were. And being what some would consider an experienced, dare I say elite young trial lawyer, I felt I should know everything one needed to know coming into the firm – there was no Google, no internet, no place to hide. I had to figure out how to learn what I needed to know without looking stupid. I was hired for my experience after all.

The stress of having to counsel clients in areas of law I was just learning was daunting. Dealing with client expectations – some I dare say were a tad unrealistic – was another challenge of epic proportions. The extra time I had to put in was not doing a lot for my blood pressure or my family and my interest in developing cases as opposed to ‘moving them’ was not doing much for my relationship with my firm. The stress was palpable – it made the Kingsfield-like colloquy of law school feel like a Fourth of July picnic and led me to realize that it would take at least 10 years of practice before I would consider hiring myself as a lawyer – so what was I doing representing other people?

Part of this struggle went back to my reasons for going to law school. I had none. At least no good ones. I wasn’t ready to go out into the ‘real world’ just yet, and I learned one could apply to law school with any sort of college major (mine was religion so biomedical engineering grad school seemed out of the question) so one LSAT later and I was enrolled.

Now not to seem totally lax about this decision, I loved the ideal that lawyers represented. Fighting the good fight for deserving clients and helping justice to prevail on a micro and macro level. But the cross-roads between naïve and idealistic is a dangerous one and if there was a flashing red light I must have driven right through it. I had no lawyers in my family – ever. And I was not an argumentative kid so no one in my family ever looked at me and said the classic ‘you’re such a pain in the butt you’ll make a great lawyer’. But off I went to my local law school and here I am today.

Now a lot happened during that nearly 45-year gap between ‘off to law school’ and ‘here I am today’ and what follows will be relevant if you’re looking to find the same sort of wellness I needed during my circuitous journey.

What you will see is that the road to happiness – yes, that really is the place I ended up – is not necessarily a straight line (unless you define a straight line as a circle) and often requires us to figure out what it means to be happy. Sometimes that doesn’t happen until we’re already on the road. Sometimes the road to happiness starts with a process of elimination – what don’t we like. Where don’t we want to go. After eliminating the negative we can appreciate what still stands before us a lot better.

So, with that said, and as I mentioned, we all have our own journey filled with miles of wrong turns that hopefully can lead to right turns – but worry not the value of the wrong turns is that they got us on the right roads – roads we may not have recognized or appreciated - in the end. So, with that in mind, here are the roads I’ve traveled to get where I am.

VISTA Volunteer, Broome Legal Assistance Corporation, Binghamton, NY [It was important for me to give back. I had no other responsibilities. This was important and special work. To this day probably the most rewarding work I have done as a lawyer. The salary - \$80 per week plus food stamps]

Albany County District Attorney's Office, Albany NY [It was time to get off food stamps – part of the compensation from VISTA – for a salary, to be surrounded by good and caring people in a great place to learn trial skills and the law/procedures/written rules and unwritten rules. Our first jobs are often the ones with the biggest impact. Here my boss shared words of wisdom I'll never forget – 'law is a tough way to make a good living'. As much as I knew he was right it was hard for me to grasp exactly how right he was at the time. It's something I grasp all too well now.]

Fancy Law Firm, FELA, Matrimonial, and Criminal Defense, Albany, NY [Wow, so this is how the other half lived. Beautiful offices, great view of the Hudson River, money thrown at me. Little did I know if I stayed there long enough I could have beaten John Grisham to write The Firm. To call this place a law firm with questionable ethics would be like calling five alarm chili a little hot. And the clients – I had never dealt with clients. That was hard enough. But some clients had ethics every bit as questionable as the firm. And often unreasonable expectations fueled by the firm to get their business, and before they were pawned off on me. The thought immediately ran through my mind – can I quit while applying for my first mortgage? I'd have no income... Then came my great awakening ... was there really a choice? I was so proud when I answered 'no'... but now what? One day soon after this revelation I was asked (told) to do things I had only heard about from others – things that were just plain wrong. I refused. I was told if I refused I would have no future with the firm. I told them they were right and walked out the door. Long story short – they were investigated and closed by the bar association within two years. Forty years later I'm still going. I just knew I was going somewhere else. I didn't burn any bridges – always a good idea – and the DA's office had an opening. They took me back. I was making enough to still qualify for my mortgage – back in the days of 17% mortgages, how lucky was I?]

Albany County District Attorney's Office and Faculty NYS Basic Prosecutor Training Program, Albany, NY [safe harbor, don't burn bridges; the first time around I listened, this time around I taught. During this time a friend called me in the middle of the night amid a breakdown, checking himself into rehab. Five kids. He was 35 years old. A seemingly perfect home and life in a perfect neighborhood. He was crying. He asked if I could buy him some clothes and take them to an address which was an unmarked building. It was late and I couldn't believe what was happening. I still did not know the full depths of unwellness lawyers could feel. I found a K-Mart that was open all night and found some clothes and brought them. He said, "the practice of law is different now. Be careful with your life". That was 1986. Technology was starting to drive things faster in the practice of law and life. Drugs were becoming more mainstream. I can't say there was a correlation. I can't say there wasn't.]

Gritty Small Town, Small Firm, whatever walked in the door, Cohoes, NY [It was time to try private practice again. My return to the prosecutor's office was a safe harbor and many lessons learned on both ends of that experience, but it was time to go. Maybe a different environment would be right for me. Smaller. Slower paced. A friend of mine had just become a judge and called me to see if I wanted his

old position at a four-person, small-town firm. I thought maybe being a small-town lawyer would be more my pace. Sadly, at least in this case, I was wrong once again. You know what rolls downhill; I was given cases none of the others knew anything about or knew too much about and didn't want to handle. There was no one I could ask questions of, I was expected to 'figure it all out' and often I did – but it took a lot of time. It consumed me. It was neither good nor healthy. It was official, private practice – at least working for others – was not for me.]

Child Protective Attorney, Albany Department of Social Services, Albany, NY [It may be hard to imagine a world where being a child protective prosecutor was a relief compared to private practice. But it was for me, at least in the beginning. The hardest job I ever had, but it was at least outside the world of private practice. Every day a child I saw cases of horrible abuse and chronic neglect of children. Case workers were trying to save lives daily and I was the only lawyer they could turn to for advice – day or night. I never felt more useful. I also never felt more stressed. For the first time I looked up the definition of 'ulcer' in medical encyclopedia – no internet back then; had to find the books at a friend's med-mal firm; suddenly for no reason and every reason I started writing therapeutically – lyrics, prose, phrases used by clients – especially the criminal, I mean alleged criminal, clients... and most of all escape plan. I may have gone to law school, but Professor Kingsfield back in The Paper Chase may as well have been talking to me when he uttered his famous "Mr. Hart, here's a dime. Call your mother and tell her there is serious doubt about you becoming a lawyer."]

Law Editor and Manager, The Michie Law Publishing Company (now LexisNexis), Charlottesville, VA [It was my birthday. May 1989. I was 34. I was in a law library in Troy, New York reading the National Law Journal and wondering how I change things. I skipped straight to the back where they printed the job opportunities and there was one at the Michie Company in Charlottesville. During my college years I'd been to Charlottesville and much of Virginia and loved it. My wife was done with cold upstate New York. So, I photocopied the ad., brought it home, and we decided that I'd apply. And so, the journey out of law practice begins – finally I was making a proactive choice that was to help better my life and my family. I needed to be more present. Less stressed. More me. A better me. So, the search for sanity began. Back to my favorite part of the country, but at 75% of my current salary even as a county government attorney – i.e., not a fortune. But the money didn't matter. Sanity did. Waking up happy did. Going to bed Sunday night without the churning in my stomach did. Being in a beautiful and wonderful place did. It felt great when they hired me. Like I was let out of prison. We packed our few belongings, I learned how to actually pronounce Michie, and two months later I was onto a new and better road. A road I stayed on for eight years as I liked the work and the people, and I was not faced with life and death decisions every day and night. I rose through the ranks to eventually earn three times more than I made in any job I had as a lawyer. But the money didn't matter so long as I could pay the bills. One of the easiest decisions I made was to forego the allure of being a highly paid lawyer – or anything. The money would never be my motivating force. Life felt right. But then came the acquisition by LexisNexis. Chaos. Fear from those who understood what this meant (I didn't). People getting fired. What do you mean it's better to get fired? What's a severance package? I somehow was not smart enough to figure out how to get fired. I was dumb enough to stay and absorb the work of those who did. The therapeutic creative writing got serious as I learned mergers are no fun especially when you're the little guy.]

Chief Operating Officer and faculty, National Institute for Trial Advocacy, South Bend, IN and Tucson, AZ [In 1997 NITA wanted to make a deal with LexisNexis to publish their books online. My job was to say ‘no’. But I must have said it nicely as they got me instead as I learned the meaning behind the phrase ‘do you know anyone who might be interested in a position with us’ when their chief operating officer spoke to me about hiring a replacement for him. I didn’t get fired from Lexis but going first to South Bend, IN and ultimately to Tucson Arizona to help cure my son’s allergies seemed like the right and only move under the circumstances. I had taught CLE, I knew publishing, I had taken CLE, I ran divisions at Lexis. This felt right. And it turned out it was. So as much as we hated to leave Charlottesville under the circumstances this was a gift horse I couldn’t look in the mouth. I got to teach trial skills all over the country, now. Maybe all that time in practice wasn’t a waste. And one of the stops was in and around Nashville. I went to the Bluebird Café by myself one night. It felt like I was among friends I’d never met. I went home from Nashville and my creative side somehow shifted into a new gear. I found myself driving down through Indiana for weekends, with my family, commuting to Nashville to co-write and absorb. Writing with people who were accomplished songwriters. Meeting producers who were music and film producers including one who hired me – because I’d been a criminal lawyer - to write a movie that involved the criminal underworld. This taught me that all the pieces of who we are should never be discarded as we just don’t know what the final puzzle will look like when it’s complete. And I got to write it with the incredible, Emmy-nominated PJ McIlvaine. I felt the balance of life wash over me, especially now realizing my son had emerging disabilities. NITA was kind enough to let us move to Tucson, AZ to help cure his serious asthma – it did – and I realized I could commute by plane (Southwest flew \$29 each way from Tucson to Los Angeles) to work on my screenwriting in that community. I think we collected enough frequent flyer miles to fly around the world. And somehow my son ended up on a terrorist no fly list. But life felt more and more balanced by the day. There were always going to be curveballs though. Now though, they just became easier to wait on and hit.

Executive, LexisNexis, Los Angeles, CA [NITA was moving from inexpensive South Bend, IN to super expensive Boulder, CO. I had already moved to the totally comfortable – if 100-degree temps for four months can be comfortable, it was - Tucson, my family told me we had moved enough. And that was fine. We loved Tucson and I was able to commute by plane to Los Angeles for three days each week, so we opted to stay in Tucson and walk back across a bridge I didn’t burn, back to LexisNexis where at least I could say during my job interview that I wasn’t fired. I’m not entirely sure what job they gave me, but they covered my airfare to and from LA along with my hotels. And I’m not entirely sure my bosses knew exactly what my job was either. Or theirs for that matter. LexisNexis was developing a new product and needed people with ‘connections’ to introduce it to law firms across the country. I had connections across the country thanks to NITA. I knew Lexis-speak and Lexis-culture. The only thing is the product wasn’t finished... but after 7 months I was finished as still no product (I’m not sure it ever got launched) and now my family wanted to go back to our extended family in New York. Oh, how things can change. But what would I do in New York? I know, I can go back into law practice after 17 years away from it – what could have possibly changed?]

Child Protective Attorney, Department of Children, Youth and Families (formerly DSS), and CLE Faculty NYS Supreme Court Appellate Division, Albany, NY [a part-time job to pay the bills while I started my

practice. I returned to this line of work much more balanced and better able to put things in perspective. It took balancing myself with additional creative outlets and learning how to manage the stress of this sort of work that came with time. It was still demanding, and the cases were horrible, but I found how much better law practice can be with a healthy dose of comfort and experience. One added stress crept in quickly, though - I had no idea a major recession was coming between 2006 and 2008, so while this helped a lot there were other stresses felt by me and others around me. If ever there was a time for balance, this was it.]

Solo Practice, Criminal Defense, Matrimonial, and Entertainment Law, Albany, NY [Building a law firm in a recession is a challenge. Practicing (and relearning the) law after being away from practice, and the state, for 17 years is a really big challenge. Representing clients, now equipped with the internet, was a bigger challenge too. And then there were challenges of family, with a disabled teenage child – a challenge all its own. I found writing to be an oasis. I wrote every day. From 5 am until my day job began. Music, screenplays, novels. It was a joy. A balance. It was like oxygen for my brain and soul. And how I met the wonderful PJ McIlvaine!!! The story could have ended right there. But beloved family members passed on and others drifted back into worlds they built before our return, and it felt that there may still be one more chapter left. I just didn't know what it would be. Then there was the advertisement in search of a director for Virginia CLE. I answered it not thinking it was more than a dream. But dreams can and do come true. As I said, we make our luck more often than not, and based on each bullet point of my life I had something to offer that turned out to be what the Virginia Law Foundation was looking for.]

Executive Director and CLE Faculty, Virginia Law Foundation, Charlottesville and Richmond, VA [Home again. Live long enough and a life with a law degree becomes a body of work, not just moments in time. We make our breaks but as we gather the piece of our lives we realize we have more and more to offer. Perhaps more than we ever thought when we look at our journeys as I have shown you above. I had run at CLE organization with a foundation (NITA) taught CLE on a state and national level, taken countless CLE courses over the years, and practiced law to understand the needs of people who will take courses like this and all of those offered at Virginia CLE ®. That enabled me to help the VLF board decide that this sort of experience could help bring value to what we do and to the legal community of Virginia. And I have spent the last nearly 12 years trying to prove them right every day. I've been able to balance the daily stresses of life and work by engaging the creative parts of my persona, and that more than anything else has given me the essential strength and sense of calm and balance necessary to navigate my personal and professional life. Sometimes a law degree is simply where life starts. Where you allow it to take you is a journey that can lead either to a straight-line fifty-year career on the interstate of practice or to down a whole lot of blue highways to places you never imagined when you first grabbed hold of your diploma. The only thing that matters though, is that wherever the journey takes you, that you arrive well and whole and at peace. That usually occurs when you take charge and don't simply go with the flow – as going with the flow can take you over a waterfall with no safe place to land.]

## Lessons Learned – Lessons to Share

This is the business we've chosen – Hyman Roth (*The Godfather II*)

... or is it? Practicing law is hard. We choose it often without having any idea what it will involve. Most lawyers will likely agree that law school is nothing like law practice. Even with clinical programs which do in fact give a taste of the profession, and summer jobs which are often a wine and dine and recruiting experience, it's just not the same as when there is someone across the desk from you, facing the most serious non-health-related matter in their life, and you and you alone are the person they are looking to for help.

We spend a lot of time and money to become a lawyer. The one thing that law school replicates most effectively can be the stress we will face. But often that stress is simply getting through it. Passing the bar. Being permitted to practice in the business we've chosen. But in the practice of law other people's lives are impacted by what we do. That can be a heavy burden. Or it could make us numb and not care. It can also be a burden too heavy to bear.

Add to that the law firm dynamics. Some require seemingly endless work schedules to meet billable hour quotas. And competing with your own co-workers for coveted partnerships within that environment. Or perhaps you're someone who chose a small firm or to go out on your own. Or had no choice but to go out on your own. More lawyers than ever are doing this, adding not only to their financial burden where we come out of law school often hundreds of thousands of dollars in debt, but also bearing the stress of having to be a jack of all trades, with little or no experience, and once again – having clients future's often depending on the judgments you make.

“You are only one decision from a totally different life.” - Wilfred A. Peterson

Nothing is irrevocable!

Going to law school was a decision. As mentioned earlier, it's a decision many of us make without knowing what we're getting into. Eventually most lawyers realize – whether we remain in practice or not – that going to law school does not make everyone who graduates suited to practice law. Sometimes we force our way through it hoping it will change. The problem is the practice of law doesn't change. We change. And that change may or may not be for the best. Sometimes we realize that we need to find something else to do. To reclaim ourselves. To pick up what's left and move to safer ground. And the good news is that we CAN find something else to do. The practice of law can and is wonderful for those who are suited. But even then the stresses can get the best of us. But for many of us it's a path to a broken life. The good thing is that nothing is irrevocable.

Like I did, you can perhaps find a more rewarding way to spend your days and still support yourself and your loved ones, still feel connected to the profession you've chosen, and find the person you were at the moment you applied to law school.

Taking back control of your life is critical. A good place to start is with how you spend your professional time. Then your time away from work. Then how you nurture your creative side – yes, we all have one even if it's simply taking time to appreciate the creativity of others. I won't write songs for a living, for example, but I love to write and by writing it helps me appreciate the ability of those who make it their life's work. It's all a question of balance – we can control things that are balanced. Things that are out of balance – not so much.

Too many people spend money they haven't earned to buy things they don't want to impress people they don't like. – Will Rogers

I've got debts no honest man can pay. – Bruce Springsteen

For some of us the practice of law has become what we call 'golden handcuffs'. We have likes. We have needs. We have loans to pay. Being a lawyer always gives us a chance to hit it big. It helps, though, from time to time to define what it means to hit it big. Is hitting it big having a huge home and a fancy car if we feel trapped in a world where we hate what we're doing, and feel ourselves slipping away?

In their groundbreaking book, *How to Leave the Law* (Wyatt-McKenzie Publishing, 2022) former attorneys Liz Brown and Amy Impellizzeri note that there is a culture of unwellness that pervades the profession. They describe on page 36 that the feelings of stress, anxiety, and being overwhelmed are common, but in the practice of law these feelings are “expected, rationalized, and in some cases, cultivated.”

Clearly this is not true everywhere. There are some wonderful law firms. Doing important things and treating people like they are their most important asset. Some would say the problem is there just aren't enough of them. If you are in a less than ideal place then what follows are some solutions.

One of the best things about being a lawyer is that the law touches so many aspects of life. Our experience with the law and the discipline that got us through law school is valuable in so many places outside of practice. Here is a list that is in no way complete but gives a taste of the sorts of things you can do with a law degree:

- Legal publishing
- Government and public policy work
- Real estate broker
- Investment advisor
- Law related journalism
- Dispute Resolution Professional
- Law Librarian
- Human Resources Manager
- Entrepreneurship including businesses related to legal technology or recruiting
- Business Executive
- Legal Researcher
- Law Enforcement



Law Firm Marketing Executive  
Law Firm Professional Development Executive  
Insurance Investigator/Adjuster  
Law faculty at a college or law school  
Continuing legal education planner or executive

... the list goes on and on. The internet makes it a lot easier now than when I left the practice of law. But still, back in the dark ages I was nonetheless able to do leave practice and build a career that has been satisfying while still utilizing my background and experience. And still paying my bills.

Most people would recommend you have a plan if you are leaving the law. Look before you leap. Understand your financial obligations, how to restructure debts, how to refocus your priorities – whether material or not – and what to do if your plan doesn't go according to plan. In a perfect world I would too.

For me, though, sometimes I had to move fast. The plan became short and simple – get out! I wanted to, and I had to. I had had enough. Let the chips fall where they may! This institute is a head start for you, with the hope you won't have to leap first and look later. It can provide a blueprint for your plan should you ever need one.

It's always darkest when the flame goes out

The most important thing you can do is get to safety before your inner flame goes out. When you feel it flickering, that's a sign to regain control and move to safer ground. To rethink your priorities, take stock of how you can restructure your obligations, determine what will help you feel best when Sunday night comes around and a new work week begins. Be there for your loved ones and for others – and for yourself. Enlist the help of loved ones, therapists, people who have transitioned out of the practice of law – or people who wish they did. And you can always contact me at [ray.white@vacle.org](mailto:ray.white@vacle.org). I will be there to assist you any way I can.

“Creativity is intelligence having fun.” - Albert Einstein

“Without music, life would be a mistake.” - Friedrich Nietzsche

My definition of creation is when we forget about ourselves... when we become so involved in what we're doing or what we're thinking about that you lose track of time and space. ~Dr. Joe Dispenza, D.C., neuroscientist

“Words have power. They breathe, they cry, they laugh, they rage, and that's why I write. Every time I write I heal myself.” - Joseph, poet, high school student, participant-FreeArtsAZ.org

Whether you leave the practice of law or simply find a way to rebalance your life as you practice, I hope you'll consider giving creativity a chance. It's the best way I know to keep the flame from going out. For me the formula is simple:

Control your wants and finances, don't let them control you  
If you work in a broken culture, strongly consider breaking free  
Find time to create and/or immerse yourself in the creations of others  
Finding balance lets you regain control

How you immerse yourself in creativity is endless. Writing, painting, music, sculpting, clothing design, home design... whatever. It can be journaling, writing a novel, writing poems, penning the next hit tv series or movie, crafting a song you will sing alone in your car or one you might even try pitching to music publishers (there is such a service offered by the Nashville Songwriters Association International – NSAI, where they can even help you finetune your songwriting skills).

Some of you may say 'I'm not creative' or 'I have nothing to say'. Nothing is likely further from the truth. You're smart, you've seen real life up close, you've heard how real people speak. One never knows where creative sparks come from but let me suggest this – just to get started spend a week making a list of spoken phrases your clients have used. Things you've heard around a courthouse. See if any sounds like a song title, a book title, a line of dialogue in a movie. Creations rarely come out whole. If they did anyone could do it. They are usually sparked by a thought we have or a comment we hear and then one thing builds on another – often not during waking hours so keep a pad or other recording device by your bed.

One anecdote that might inspire you in this way comes from the hit songwriters Allen Shamblin and Mike Reid, who co-wrote the classic *I Can't Make You Love Me*, made famous by Bonnie Raitt, George Michael, and covered by so many others. As the story goes the idea for the song came to Reid while reading an article about a man arrested for getting drunk and shooting at his girlfriend's car. The judge asked him if he had learned anything, to which he replied, "I learned, Your Honor, that you can't make a woman love you if she don't." (1001 Songs: The Great Songs of All Time and the Artists, Stories and Secrets Behind Them, Toby Creswell). You've probably hung around your share of courthouses too. You never know.

Then there are those who leave the law completely and follow a business or creative pursuit, and never look back. I practiced with someone who traded in one bar for another. He had enough of law practice and bought a bar called the Grinch. He hung his diploma over the cash register. The cash register was quite active. The place was packed regularly (it was Albany, New York, after all, where the bars are open until 4 a.m.) proving there are many things you can do with a law school diploma.

Still, if that's not enough, for further inspiration, look at this list. What do they all have in common?

Pyotr Ilyich Tchaikovsky  
John Cleese  
Gandhi  
Harper Lee  
David E. Kelley

Igor Stravinsky  
Meg Gardiner  
Nelson Mandela  
Scott Turow  
Rebel Wilson

Andrea Bocelli  
Gerard Butler  
Henri Matisse  
John Grisham  
David Baldacci

Answer: they all studied or practiced law.

And obviously there are countless other lawyers who have created wonderful art whether known to the world or just to themselves. There is a link between the law and the creative mind. If you don't believe that, just think of some of the arguments we've had to make on behalf of our clients.

And whatever you choose to do, whatever you choose to create, we want you to know that music has a special and proven healing power all its own. Whether you write it or play it or sing or just listen, this can be an important part of your wellness journey.

## A Simple Closing Thought – This Too Shall Pass

'This too shall pass' is as simple as it is profound. Perhaps overused, it likely is for a reason as it can ground us when all looks lost.

It offers 'instant perspective' when we're ready to embrace it. When we not only hear it, but when we listen to it. It's not a panacea... the bad passes, but so does the good... but it helps us know when there's bad, there will be good. And when there's good, it will get us through the bad.

I though, have said enough. I think now it's best to close by drawing your attention to this poem and narrative below. Written over time by a mental-health nursing student, you will instantly feel its power but still it can be a beacon of light as you take stock of your own journey and find the freedoms that will turn making a living into living your life.

## This Too Shall Pass – A Poem and a Story by Nikki Mattocks

At the time of this writing, Nikki Mattocks was an Evolve Leader, Time to Change Champion, Young Minds activist, Rethink Mental Illness volunteer and 3rd-year mental-health nursing student based in the UK.

### Part 1 - 25th September 2018

I feel like I'm drowning,  
in an acid filled sea,  
I don't know how to swim,  
I don't know how to breathe  
My heart is so heavy,  
I can't lift my head up  
I try to fake a smile  
but life is too tough  
I just want to scream  
but nothing comes out  
the devil has caught me  
his voice is so loud  
Hope has left me  
Colour has gone from the sky  
The only question I have  
is why... just why

Depression is the worst feeling I can describe. But I can't describe it. I feel a heavy aching in my heart and in my limbs, and an impending sense of doom, like there is no hope.

I have experienced depression since I was six years old due to bullying and abuse, although I wasn't formally diagnosed at the time. I was diagnosed with recurring depressive disorder with psychotic symptoms when I was 14, after I had experienced a traumatic event. I was so unwell that I had multiple hospital admissions and received intensive therapy. I was self-harming, hearing voices and abusing drugs and alcohol. I was in an abusive relationship, and I felt so low that I tried to take my own life.

Thankfully, it didn't work.

I started college, met new friends, did trauma therapy and started volunteering with charities. Things got so much better. I finally felt like I had a purpose. Through sharing my story, I was able to achieve incredible things. I spoke in both the UK and European parliaments, I met the Royal Family, I appeared on TV, radio and newspapers and I began speaking at schools and conferences. I was able to share what I had been through, and how things can and do get better.

In 2018 though, my life came crumbling down yet again. I lost a friend to suicide, and my heart broke. The depression and psychosis came back, worse than it had ever been before. I spent five months in the hospital, involuntarily, and had to have staff members with me at all times.

Words cannot describe how awful that time was. I wrote in my diary, “I’m praying for a miracle, maybe one day it’ll come, but for now I’m stuck here, without any sun.” And that’s how it was. There was no light in my life. Nothing but darkness. I tried so hard to find hope, but I found none.

It wasn’t until I was sent to a psychiatric intensive care unit that I eventually got better. With the help of medication, time and connecting with others, I found my strength yet again.

Someone once told me that the will to live isn’t something you can find externally—you have to look inside yourself. And I dug deep. I read books, I listened to music, I spoke to people and eventually I learned that I have hope, simply because I’m human.

Life can be bad, then it can be good, then it can be bad again. But the main thing to remember is that nothing is permanent in life. Bad times cannot last forever, and neither can good. The sun will always set, but it will rise again in the morning. There is always hope, and the pain will pass. I promise.

## Part 2 - 10th January 2019

This too shall pass,  
Is a quote i live by  
I remember this  
when I don’t want to try  
The sun always sets,  
but it will always rise  
To every single day  
This always applies  
Even in the darkness  
I can see the stars  
Even when I don’t see the light  
I remember it can’t be too far  
I said it once,  
I’ll say it again,  
This too shall pass,  
Amen, Amen, Amen

# A Writer's World

PJ McIlvaine

Author and Emmy-Nominated Screenwriter

Hello, everyone. I'd like to thank my wonderful friend and comrade in writing arms Ray White and all the great people at the Virginia Law Foundation for inviting me to this fantastic event. I'm a bit amazed that they thought me important enough to invite, quite frankly. You see, I'm a nobody, I'm just a mom, Grandma, and mostly a stubborn old goat (i.e., Capricorn) who had a dream from a very young age and never gave up despite all the obstacles and lemons that life threw at me. Maybe I should have, but I'll let you be the judge of that.

## A Little History – From the Heart

We all know there are so many writers who started off as lawyers. Some who write as they continue to practice law. Others who dive into writing full time. Lawyers are known to be storytellers. And do they ever have stories to tell. I'm here to help give you all a window into my journey through the world of writing, along with some things I learned along the way, and maybe it will help you unleash the writer within to help give you a sense of creation, a step toward work/life balance, or a whole new career.

I'm a writer. I don't say that lightly. You see, writing is more than a hobby for me. It's my life, my reason for being. Now don't get me wrong. I love my husband, I love my kids and grandkids, but writing is my drug, it's in my bones, it's in my DNA. I could no more not write than breathe and believe me, I've tried. When I was younger and idealistic, I flirted with being a lawyer. I even took Pre-Law in college as I fancied myself a female William Kunstler but without all the drama. However, it was a brief flirtation once I realized I missed writing too much. I've been writing since I was five or six years old; neighborhood comics, poems, song lyrics, short stories, letters to the editors, essays, picture books, novels, and Amazon wish lists.

Even though I never saw my writing as a hobby, plenty of other people did and told me straight to my face, and this included some close members of my family. It hurt, of course, but I didn't let the naysayers stop me (and you shouldn't either). At that stage of my life, as a young married woman with children, I couldn't afford to stay home and write to my heart's content. So, I did the next best thing: I got a full-time job as a customer service representative for a major Long Island newspaper. Since I didn't have a college degree in journalism---or any college degree---there was no way for me to get a job in editorial. But the job allowed me to write during breaks and my lunch hour, and honestly, it was great while it lasted. It fueled my ambition to write professionally--or at the very least, write until someone noticed me. And when I was home, I wrote while the kids played around me. It wasn't easy at times, but I made it work.

So, when I sold a screenplay to Mimi Rogers' production company despite all the odds in the late 90's, I thought this was my lucky break, my ticket to fame and fortune. The movie, *MY HORRIBLE YEAR* with Eric Stoltz, Mimi Rogers, and Karen Allen, eventually aired on Showtime to great acclaim. But just to show you where I was on the ladder, I didn't learn that the movie had been nominated for a Day-time Emmy for Best Director until I heard it live the night of the Emmy broadcast. So much for being noticed. Instead of Hollywood rolling out the red carpet for me, I was still stuck in New York with an embarrassing series of managerial missteps, agent misfires, and basically, a failure to launch. But also, to be fair, I guess I wasn't writing things that people wanted to buy. As one producer told me, "It's the kind of movie Disney used to make." Trust me, he didn't mean it as a compliment.

Even as the rejections piled up, I wrote. Maybe I wrote because of them. I used to say, half-jokingly, that I didn't know how to be anything else but a writer. So, I persisted despite all the challenges, and there were many; family illness and deaths, financial issues, and then my own years-long struggle with anxiety and panic that became so debilitating it forced me to leave my job at the newspaper. Not good times at all.

My OCD kicked into overdrive and there was a long period when I couldn't even leave the house without going into a tailspin of what if's. A series of family and financial catastrophes followed that compounded my anxieties. My father died (another sad story best left unsaid), and then my brother, a drug addict with Daddy issues, committed suicide. And through it all, through the tears and heartache, I wrote, still dreaming of "one day."

So, I've been where many of you may have been at one point: broken and on the bottom, though outwardly, it didn't seem that way. I kept a happy, smiling face going even when I was miserable. But misery is like a river, it ebbs and flows, and it's changing and evolving. It took a long time; therapy, medication, and gritting through it, but eventually my anxiety and panic attacks subsided to the point where they were manageable. Even so, I never knew what might trigger the painful cycle again, so I didn't do anything too daring or adventuresome. I pretty much stayed in my safe line, and that also applied to my writing.

Two things happened at nearly the same time which began a sea change in my life: I was sued for fifteen million dollars by a major movie studio in a bogus lawsuit, and my mother began showing signs of Alzheimer's. Sometimes trouble is like a boulder going downhill, it gets bigger and bigger as it goes and picks up speed. But a good thing came out of that lawsuit, and that was meeting Ray White. Thanks to his efforts, after a year of dangling me on the hook, the movie studio folded its carnival tent and left town.

My mother, however, had quite a different ending.

Flash forward a couple of years. My mother's decline is precipitous and without warning. In January she was able to go to the doctor and crack jokes and by April she was in diapers and refusing to eat because she accused us of lacing her food with poison. After a horrendous month I wouldn't wish on my worst enemy, Mom passed away. After her funeral, we were so physically and emotionally exhausted that we were all sick for a month.

Now I'm at a crossroads. I finally decided that "one day" is now. I put screenwriting on pause and rediscovered my passion and love for prose. And doing that---by following my muse---I started the slow but steady climb back to some kind of normalcy, or what normal is for me. I know my limits. I'm not the type to throw caution to the winds. I'll never climb Mr. Everest. I won't go skydiving. And that's fine with me. Just coming to this symposium is a big step, one I could've never envisioned even two years ago. I'm not afraid to leave the house anymore. Yes, I still have some fears I need to work on and conquer, but I'm 1000% better than what I was.

So, I guess what I'm trying to say, albeit in a roundabout way if anyone is still awake, is that there's no magic bullet. I wish there was. All I can tell you is what I've learned through trial and error along the way and if that resonates or helps even one person, I suppose that's something.

## Some Words of Wisdom You May Want to Take to Heart

Dare to dream: everyone needs a dream or a goal, no matter how outlandish or impossible it might seem. When I decided to dip my toe into writing screenplays, people told me I was kidding myself. Who did I think I was? I was just a housewife on Long Island. I didn't know anybody in Hollywood. I had no connections. Nothing. If I had listened to the gloom and doom scribes, I wouldn't have sold to Showtime what was essentially a first draft, and the fifth screenplay I ever wrote. So don't let anyone tell you that your dream is mission impossible. If I can do it from my writing cave (and this was back in the day when weren't able to interact the way we can now, thanks to the internet), anyone can.

Permission to fail: In the summer of 2021, I was between projects. I'd just finished writing a middle-grade novel and didn't know what work in progress to work on next. Two ideas had been floating in my brain for the longest time: a middle-grade novel about two brothers who create a "monster" to keep their parents from divorcing, and an adult thriller about a man who can't run away from the worst night of his life. After tossing it around some, I decided, almost for the hell of it, to mash the two ideas together to see if it had legs. I wasn't writing it to please an agent or to the market. It was just for me, no one else, so I allowed myself to write whatever I wanted. If it turned into a huge pile of dino poo, so what? No one was ever going to see it. So, I wrote in a hot zone over two months. The words poured out of me, and I bled on every page. As it turned out, giving myself the freedom to write without fear of failing was the best gift I ever gave myself. It allowed me to go places I would've never had the courage to, and I tapped a side of myself that I never knew was there. Now, some may say that's a bad thing, but that's another tale. Now I firmly believe that I can write anything if I put my mind to it; well, almost anything. Which leads me to...

The big ask: This is something I still have a hard time with, even though at my age, you'd think I'd have gotten over it. When I was deep in the throes of my anxiety and panic attacks, I told myself that I could handle it all on my own. There was no reason to trouble anyone with my problems. They had enough problems of their own, no one wanted to listen to my miseries. So, I hid it as best as I could and sucked



it up until I couldn't anymore. Asking for help isn't a sign of weakness; it's really a sign of strength. Admitting you have a problem is the first step to getting better. I really believe that.

The worst thing that could happen: When I was going through some extremely tough periods, times when I didn't know how I was going to pay the mortgage or the electricity was in danger of being shut off, I'd imagine the worst. We'd be evicted, we'd wind up living under a bridge, we'd lose everything, yadda yadda yadda. Did the worst ever happen? Nope. I always found a way. Sometimes it required a leap of faith; others, thinking outside the box. And sometimes, it was providence and luck. But we were never homeless. The fridge stayed on. When our kids were little, it was easier. It was harder when they got older and began to understand that their parents weren't perfect and made mistakes. Plenty of them. Still, we managed, and the kids are all healthy, happy, and productive, so we did something right despite ourselves.

Be selfish: Yes, you read that right. If you're truly serious about doing something well, it takes practice, passion, discipline, dedication, sweat, tears, patience, focus, faith, and sacrifice. If you want to become a star quarterback, you're going to put in the hours on the field. It's no different with any creative expression. To be a writer, you have to write. You have to do the work. And for me, that means being selfish. There were many instances where it would've been so much easier to blow off writing. The kids needed me. I could do it another day; it really wasn't that important. But I didn't. There were undoubtedly times when the kids resented me, or people couldn't comprehend what I was trying to accomplish. And that's okay, it comes with the territory. So, what I'm saying to you is be selfish, nurture yourself and your goals and dreams. Yes, you'll feel guilty. I know I did and still do. But at the end of the day, you have to live with yourself and feel like you've accomplished something other than just sucking up air. And if being a little selfish helps in that regard, so be it.

So, to sum it up, in the immortal words of Forrest Gump: life is like a box of chocolates. You never know what you're going to get.

If anyone has questions or just wants a friendly ear, I'm accessible. My email is [pjmac56@yahoo.com](mailto:pjmac56@yahoo.com), and my website is [www.pjmacwriter.com](http://www.pjmacwriter.com)

I'm also pretty active on X (Twitter), Instagram, and Facebook.

## **IV.**

# **Helping Lawyers Stay Well While Managing a Busy Career, Life, and Family**

**Donna Edbril**



# Feel More Fulfilled in Your Legal Career by not Sacrificing Work-Life Balance

Donna Edbril, Certified Leadership/Career Coach  
Former Chief Counsel for Avon Products and Godiva Chocolate

## Introduction: My Personal Story

I have been a lawyer for more than 35 years. For the first ten years of my career, I was a litigator and worked in two New York City law firms. The second firm, which was known as a “Wall Street” firm, employed very few women associates and did not have any women as partners. There was only one senior associate who was a woman. She worked in the corporate department and regularly clocked very long hours. By her own admission, she sacrificed many evenings away for her family in the hope she would become the firm’s first woman partner. Unfortunately for her, she was not made a partner and shortly thereafter, left the firm.

While I was driven, ambitious and enjoyed litigation, after a short time I realized that I probably would not make partner at this firm and therefore did not have a long-term future there. At that point I decided that I was done with worrying about whether I was billing enough hours, getting enough exposure to the “right” partners and feeling guilty about leaving the office at 6:30 p.m. to be with my family. I knew that I needed to make a change for my own wellbeing and the wellbeing of my three-year-old son.

I was fortunate to get a job as senior counsel at Avon Products and never looked back. For the first time since the birth of my son, I felt that I had some semblance of work-life balance. My hours were predictable, the work was interesting, and I was finally in an environment that was “family friendly”. It was okay to talk about your children and admit that they were a priority without worrying that you were risking your career.

I loved being an in-house lawyer. I worked at Avon for sixteen years and ultimately left to become General Counsel at a series of public and private companies.

As I moved up the corporate ladder to eventually become General Counsel, I did not question whether I had a genuine or at least an acceptable work life balance. I think part of the reason for this is that I was fortunate enough to work for companies that valued families and understood the competing demands of being a mom and lawyer.

However, I do admit that I often questioned whether my professional goals were in sync with my personal goals. I wondered whether I could give my two children what they needed while also trying to advance in my career. What were my kids missing out on because I was a working mom? Was I somehow doing them a disservice because I worked? Would I ever be able to stop feeling guilty about being a working mom?

My “aha” moment came when I was having dinner with my kids one evening and asked them how they felt about me being a working mom. My daughter said that she wished that I could be home more but quickly said that she was very proud of me. My son looked at me as if I had two heads and said: “Are you kidding mom, I don’t want you to be like the other moms who don’t work .... you would be so annoying.” I told my kids that I loved them very much and while my job was important to me, at the end of the day, I wanted them to know that NOTHING was more important to me than the two of them.

I also came to accept that being a mother and an ambitious lawyer were simply part of my DNA. I had to give myself permission to own the choice I made to have children and a career. I needed to stop being so hard on myself and embrace both of my roles, mother and lawyer, and trust that my kids would be just fine. This, and what follows will hopefully help my fellow lawyers find the balance we all need.

After a 35-year legal career, I became certified in leadership coaching and created Donna Edbril Coaching. I’m passionate about empowering my fellow working moms to let go of their guilt, create their own definition of work life balance, and have the careers they want.

## **Part 1: Break the pattern of thinking that keeps you feeling guilty, overwhelmed, and frustrated.**

“I can do it all / Work life balance is the goal.”

Assumptions I’m going to invite you to let go of:

- Not static state, you figure it out once and stick to it forever.
- Not one definition / beware of comparison.
- Not an outcome, but a process over time.

How could these assumptions keep you stuck?

How to look at work-life balance differently- not as an outcome or end point but as a process and part of one's life's journey.

Define what work-life balance means to you and no one else. No one size fits all. And the solution today isn’t necessarily the solution for tomorrow.

Are you willing to free yourself from this idea that there is one answer for everyone, and embrace what would work for you?

In order to look at work-life balance differently, the first step is to clarify your values.

## Part 2: Take the first step in a new approach to work-life balance as a practicing attorney.

We all THINK we know our values and what's important to us, but do we really? Do we ever take the time to think about whether we are truly living aligned with our values?

Why don't we?

Today, let's make space to reflect. Take time we never make for ourselves in our busy lives.

If you're thinking, "what difference does this make? /or can this actually change anything?" my answer is, "I don't know. But neither do you... if you haven't done this yet if you haven't really reflected on this. Let's take a test drive!"

We've all seen values assessment, given 100 values, and asked to pick your top 3. I find the 100 values process difficult and frustrating like I was excluding parts of myself and values I thought were important. So, here's a different approach we're going to walk through together today.

Here are a few questions to answer today:

1. What do you admire most about yourself?
2. What are you most proud of having stood up for?
3. What quality do you possess that sets you apart from others?
4. How do you want to be remembered by others? By your children?
5. What is one very difficult decision you made in the last year that you are very proud of?
6. What is one thing you regret sacrificing in the past year? What were the costs?

What patterns are you noticing?

Would anyone be willing to share?

What is 1 way this can change how you prioritize your time?

How will this make a difference in your life?

## Part 3: Identify what to do first in the next 30–90 days to see a significant shift in your work-life balance.

So how do we put this all together so that it's more than just words and can turn it into action that might really change things for you.

The problem with making change is you're so busy... how do you even reflect and decide what needs your attention first.

Let's take some time to reflect now. Here are 7 areas/steps to consider in order to bring about change.

### The 7 Essential Elements of Work-Life Balance

I. Focus on Your Core Values- This is what we started with today... As I mentioned before, this is the starting point for thinking about work life balance. Identifying your core values gives you a sense of meaning and purpose and helps guide your behaviors, decisions, and actions.

II. Clarify/Reframe Your Expectations- What expectations have you set for yourself? Are they in alignment with your values? Take a step back and look at what you're prioritizing, what are you sacrificing and what impact is this having on you? What would it look like to be in alignment with your values and you were free of the "I Should."

III. Ditch the Guilt- Stop beating yourself up about all the things you think you're not doing right or falling short of. Don't buy into the idealized image of being perfect. Your career is important to you so embrace the decision you made to work. Let go of the energy that's wasted on feeling guilty about what you should be doing or not doing all the time.

IV. Set Boundaries- By setting boundaries you are honoring your values and ensuring that you have time and space for your priorities. Being able to have a satisfying legal career AND be present for everything else that's important to you in your life involves making tradeoffs and choices. Figure out what tradeoffs are acceptable and then set boundaries around the choices you make.

V. Subtract- As a lawyer you probably add things to your already full plate and never take things off your plate. Be more deliberate in what you take on - take the things that are more trivial out of your daily to-dos. Decide what's important to you and let other things go.

VI. Support- As lawyers, we think we have to be the best and perfect, most of the time which makes us see support as a sign of weakness or vulnerability. One of the fastest paths to work-life balance is to stop

thinking we have to shoulder the burden alone, and really think about how other people in our personal and professional lives can support us.

VII. Self-compassion- Most people don't find much room in their lives for self-compassion. A lack of self-compassion shows up as judgmental self-talk, incessant pressure to perform at the expense of your health, and long hours that sacrifice personal time. Self-compassion is often dismissed in professional circles because it's considered selfish or self-indulgent or too "woo-woo". But imagine what would be possible if we were a little kinder to ourselves, and didn't feel like we were on the verge of burnout all the time?

## Considering everything, now take a minute to answer these questions:

1. If you were to only do one of these things for the next 30-90 days, which would get you the most relief?
2. What are 3 steps you'll put in place to incorporate these elements in your life?

## Wrap up: Q & A

**V.**

## **Therapeutic Interlude 2**

# **Wellness Is a Process Not a Moment**

**Tim Carroll**

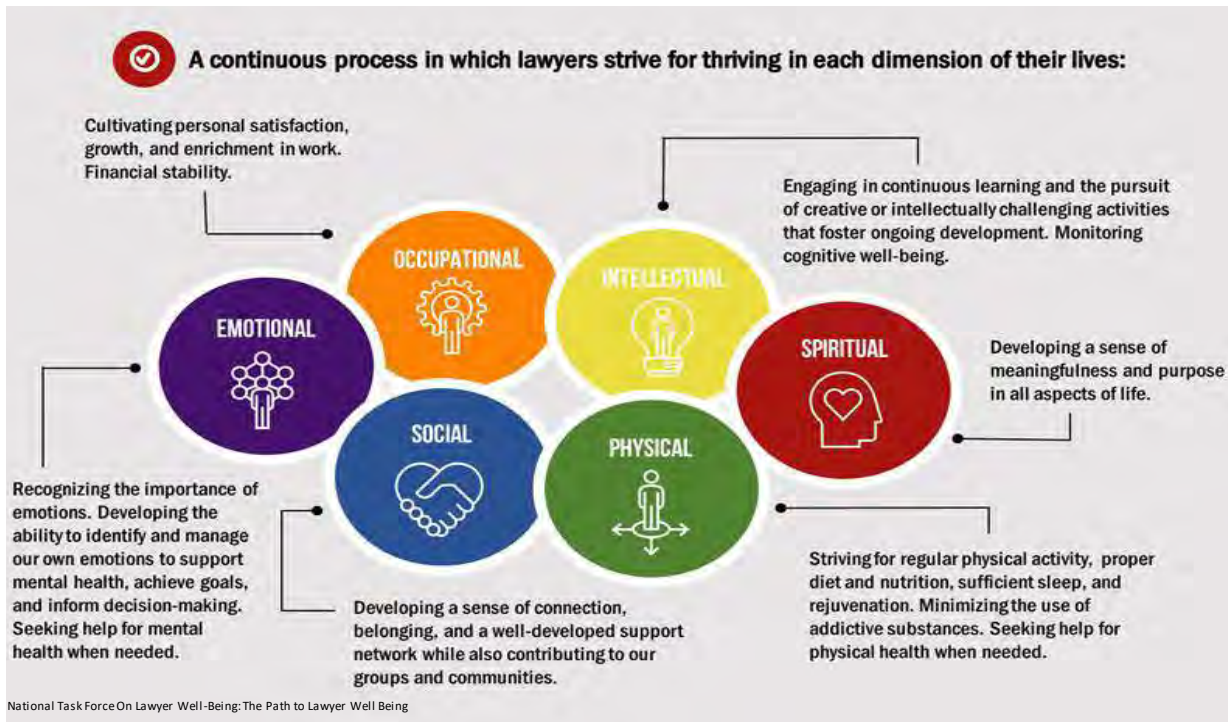




# A Continuous Process in Which Lawyers Strive for Thriving in Each Dimension of Their Lives

Tim Carroll

Executive Director, Virginia Judges and Lawyers Assistance Program



**VI.**

**Suicide Prevention  
Best Practices for the Legal  
Community**

**Deborah Casello**



# Suicide Prevention Best Practices for the Legal Community

Deborah Casello  
President, Keys 365 Suicide Prevention  
Fairfax, Virginia



KEYS 365 is dedicated to saving lives through cost-free interactive suicide prevention education, which inspires open conversations and strengthens meaningful community connections.

In every community, there is work to be done.  
In every nation, there are wounds to heal.  
In every heart, there is the power to do it.

- Marianne Williamson



## Class Objectives

Participants will be able to:

1. Identify the scope and impact of suicide on attorneys reflected in current statistics.
2. Differentiate three common myths from facts about suicide.
3. Use currently recommended verbiage around suicide and prevention.
4. Increase awareness of connection-building vs. separation-causing language.
5. Incorporate empathy when utilizing the best-practice suicide prevention framework.
6. Recognize risk factors and warning signs of suicide, both attorney-specific and general.
7. Meaningfully connect to determine if support is needed and (as appropriate) ask directly about suicide.
8. Identify and offer possible support resources.
9. Utilize several self-care and well-being tips and techniques which promote resilience.
10. Make a difference regarding suicide and mental health within the legal community.

## Class Agenda

Welcome

Small Group Introductions

*Activity - Water Bottle Resilience Information*

Risk Factors and Warning Signs

*Activity - Discussing and Identifying Signs/Factors*

Connecting and Meaningful Conversations

*Activity - Empathy and Asking Directly About Suicide*

*Activity - Talking Openly About Mental Health*

Offering Hope and Support Resources

*Activity - Putting It All Together, Practice Dialog*

Resilience Building and Self-Care

*Activity - Hope Starts With You; Mindfulness Techniques*

Conclusion

## Jumping Into Connection

Small group introductions activity.

Take turns and introduce yourself, share your firm or organization, and read the resiliency tip on your water bottle to the group.

Note the QR code on the water bottle label:



If you would like more information on any of the tips, scan the code, and find more information on the KEYS 365 *Resiliency Page*.

## Current Verbiage Chart

### Words Matter:

INSTEAD OF THIS...	SAY THIS...	WHY
<p>commit suicide committed suicide</p>	<p>died by suicide lost their loved one to suicide</p>	<ul style="list-style-type: none"> <li>• “Commit” implies a sin or crime has taken place, which reinforces stigma and shame.</li> <li>• “Died by suicide” reduces stigma by not assigning blame.</li> </ul>
<p>successful or unsuccessful suicide completed or failed suicide</p>	<p>died by suicide survived a suicide attempt</p>	<ul style="list-style-type: none"> <li>• “Successful” or “completed” implies a positive result instead of reflecting the reality of a traumatic loss.</li> <li>• “Died by” or “survived” simply and accurately states the fact.</li> </ul>
<p>epidemic skyrocketing</p>	<p>rising increasing</p>	<ul style="list-style-type: none"> <li>• “Epidemic” may cause anxiety and heightened emotion along with perpetuating ideas that it is unavoidable and more prevalent than it is.</li> <li>• “Rising” or “increasing” help to provide accurate descriptions without creating unnecessary feelings of fear or other negative responses.</li> </ul>
<p>(Name) is suicidal.</p>	<p>(Name) is thinking of suicide.</p>	<ul style="list-style-type: none"> <li>• It is important to separate the current condition, thought, diagnosis, or experience, from the identity of the person.</li> </ul>
<p>He’s suicidal. They’re a schizophrenic. They are mentally ill/addicts. He is homeless,</p>	<p>He is thinking of suicide. They have a mental illness / are living with a mental illness. People with mental illness / People addicted to... / People with addiction He is experiencing homelessness.</p>	<ul style="list-style-type: none"> <li>• It is important to separate the current condition, thought, diagnosis, or experience, from the identity of the person.</li> </ul>

## Risk Factors and Warning Signs

Discussing and identifying signs/factors activity.

In pairs, sort the risk factors and warning signs provided in the envelope, into the following four categories:

- **Direct Verbal:** Statements in which it is clear that a person is talking about taking their own life.
- **Indirect Verbal:** Statements which need a follow-up question to determine if a person is talking about wanting to die by suicide.
- **Behaviors:** Observable things a person is doing that may indicate thoughts of suicide and/or the need for support resources.
- **Situations:** Conditions beyond a person's control but that may indicate thoughts of suicide and/or need for support resources.



## Asking Directly About Suicide

Connecting and meaningful conversations activity.

In pairs:

- Practice asking your partner about suicide.
- Take turns reading directly from the script below.

**"Sometimes, when people are really struggling, they have thoughts of suicide. So I feel it's important to ask: Have you been thinking about killing yourself?"**

## Talking Openly About Mental Health

There may be situations where asking about suicide is not possible, but offering support is an option. Practice connecting about suicide and mental health to provide a resource to a colleague or client.

In pairs:

- Practice providing a resource for someone who may be in need of support around suicide / mental health.
- Take turns reading directly from the script below.

**"We all have times where we struggle and feel overwhelmed; sometimes, people even have thoughts of suicide. Mental health support can make a big difference, so I feel it's important to make sure you know about the 24/7 Lifeline, which is available by calling or texting 988. You can reach out for yourself or if you are concerned about someone else."**

## Hope and Support Are Available!

**From the Centers for Disease Control and Prevention, "Suicide is rarely caused by a single circumstance or event. Instead, a range of factors can increase risk. These risk factors are situations or problems that can increase the possibility that a person will attempt suicide."**

Some include:

Previous suicide attempt

History of depression and other mental illnesses

Serious illness or chronic pain

Criminal/legal problems

Job/financial problems or loss

Impulsive or aggressive tendencies

Substance misuse

Current or prior history of adverse childhood experiences (ACEs)

Sense of hopelessness

Violence victimization and/or perpetration

Bullying

Family/loved one's history of suicide

Loss of relationship(s)

High conflict or violent relationships

Social isolation

Lack of access to healthcare

Suicide cluster in the community

Community violence

Historical trauma

Discrimination

Stigma associated with help-seeking and mental illness

Easy access to lethal means of suicide among people at risk

Unsafe media portrayals of suicide

-Centers for Disease Control and Prevention <https://www.cdc.gov/suicide/factors/index.html>

There are many impactful options for hope and healing!  
Scan the QR code linked to the KEYS 365 Resource Page  
for a starting point to connect with support opportunities.



## Hope and Support Are Available!

Be the bridge to support! Some resources to start unlocking hope:

**988Lifeline.org:** “The **988 Suicide & Crisis Lifeline** is a national network of local crisis centers that provides free and confidential emotional support to people in suicidal crisis or emotional distress 24 hours a day, 7 days a week in the United States... The Lifeline offers an interpretation into over 240 languages”

**211.org (national) and 211Virginia.org (state):** “**211** is an easy to remember phone number connecting people with free information on available community services. When you dial 2-1-1, a trained professional listens to your situation and suggests sources of help using one of the largest databases of health and human services in Virginia.” Services for non-English speakers available.

**Warmline.org (click directory for state numbers):** “A warm line is an alternative to a crisis line that is run by “peers,” generally those who have had their own experiences of trauma that they are willing to speak of and acknowledge. Unlike a crisis line, a warm line operator is unlikely to call the police or have someone locked up if they talk about suicidal or self-harming thoughts or behaviors.”

### **\*Reminder:**

**If you believe someone has a plan to take their life or an attempt is in progress, it is critical to involve professional support. Call/text 988, call 911, or go to the nearest emergency care. If possible, go to or remain with the individual, provided your personal safety is not at risk. Do your best to stay calm, listen without judgment, and connect with appropriate professional support.**



## Putting It All Together

Offering hope and support resources activity, reviewing best-practice scenario dialogue script and group discussion.

In pairs:

- With one partner as *Person A* and one as *Person B*, read only the first page and stop for guided group discussion.
- There will be short guided group discussions after each of the three pages.
- Note: The practice dialogue is written using generic verbiage. In a real conversation, you would add specific risk factors or warning signs, appropriate for the situation. The dialogue reflects various examples from the following:

<https://talkawaythedark.afsp.org/thinkingaboutsuicide/>

<https://talkawaythedark.afsp.org/thinkingaboutsuicide/>

<https://talkawaythedark.afsp.org/startaconversation/>

<https://talkawaythedark.afsp.org/reachingout/>

<https://opentextbc.ca/studentsuicideawareness/back-matter/practice-scenarios-and-responses/>

[https://www.nami.org/Blogs/NAMI-Blog/September-2021/How-to-Talk-\(and-Listen\)-to-Someone-Experiencing-Suicidal-Thoughts](https://www.nami.org/Blogs/NAMI-Blog/September-2021/How-to-Talk-(and-Listen)-to-Someone-Experiencing-Suicidal-Thoughts)

<https://www.nami.org/Blogs/NAMI-Blog/September-2019/How-to-Ask-Someone-About-Suicide>

<https://www.samhsa.gov/sites/default/files/starting-the-conversation-guide.pdf>

<https://store.samhsa.gov/product/helping-your-loved-one-suicidal-guide-family-friends/PEP20-01-03-001>

## **ENGAGE & CONNECT**

*\*In a private setting, use a warm greeting, and remember that your tone matters.*

**Person A:**

*I'm glad you have time to talk because I want to check in with you. There are some really difficult things happening in your life that would be hard for anyone. It also seems like there have been some changes in your behavior, and then you said that you're exhausted all the time because you can't sleep. I'm concerned about you, how are you really doing?*

---

**Person B:**

*I don't know...things are pretty awful right now...but you're busy; I'm fine.*

---

**Person A:**

*When I've had tough times, having someone to talk with made all the difference. I care about you and have time to listen to whatever you're comfortable sharing.*

---

**Person B:**

*Everything is totally overwhelming... Everyone would be better off if I were gone...I just can't take feeling like this anymore.*

---

**Person A:**

*I want you to know you are not alone in this. Sometimes when people are really struggling, they have thoughts of suicide. So I feel it's important to ask: Have you been thinking about killing yourself?*

*Regardless of the answer given, remember support is important!*

---

**Person B:**

*I'm exhausted and stressed out all the time. There is just no hope. I really don't see a way through this. Yes, I have been thinking about killing myself.*

---

**Person A:**

*Thank you for trusting me with your feelings. I can hear how painful things are right now. Have you taken any steps toward ending your life, like making a plan?*



## OFFER SUPPORT & HOPE

**Person B:**

***No, I haven't done anything yet. I'm just so overwhelmed and don't know what to do. It feels like everything would be better if I were dead.***

*\*The individual may not share the whole situation or even what is really happening. Regardless of their response, listen and do your best to stay present and judgment-free. Your focus is not to fix or take on their challenges. Your goals are to be present, offer resources, and be the bridge to support.*

---

**Person A, Possible Options:**

***We all need help at different times and for different reasons. This is important, and there is no judgment from me. I want to support you with resources as soon as possible. I have some ideas; how about we start together now?***

**OR**

***I haven't been in your exact situation, but everyone, including me, needs support at one time or another. This is serious, and getting the right help is really important. I have some ideas; how about we start together now?***

**OR**

***I want you to know that you are not alone in this. I have some ideas about resources for getting support; how about we start together now?***

*\*As appropriate, substitute "start" with: "call" or "text" or "go".  
How about we call together now? How about we go together now? How about we text together now?*

---

**Let them know you will follow up by making a specific check-in plan.**

**Person A:**

***I'm grateful that you shared how you are feeling, and I want you to know that you are important to me. I am going to check in with you again tomorrow. Remember, you are not alone in this.***

---

*\*When you have asked someone about suicide, remember to connect with trusted follow-up support and share appropriately about the conversation. This can provide additional perspectives about the situation and added support for the individual who is struggling. Having a "debrief" conversation is also valuable self-care for you!*



## RESPECTFULLY ADDRESS RESPONSES

\*The individual may not want to engage support resources at the moment, and at times extra prompting is helpful. Below are ways to respectfully address some common responses.

---

**B: *I don't know. What if they can't help me?***

**A: *Well, there are no guarantees, but the first step is to try something. If it isn't the right fit, there are a lot of options out there. You are not alone in this.***

---

**B: *Everyone has problems. I'm fine and don't want or need help!***

**A: *I agree that everyone does have problems, and I completely respect how you feel. In case you change your mind, would it be ok for me to give you a couple of options for resources? I want you to know you are not alone in this.***

---

**B: *I'm embarrassed about what people will think of me.***

**A: *I know what you mean; sharing about problems in order to get support makes us all feel vulnerable, but it is also a really brave thing to do. There are some great options over the phone. Why don't we start with a call or text?***

---

**B: *I don't want to go or call alone.***

**A: *Let's go or call together. You are not alone in this.***

---

### **\*Important Reminder:**

If you believe someone has a plan to take their life or an attempt is in progress, it is critical to involve professional support. Call/text 988, call 911, or go to the nearest emergency care. If possible, go to or remain with the individual, provided your personal safety is not at risk. Do your best to stay calm, listen without judgment, and connect with appropriate professional support.





## Hope Starts With You!

Resilience building and self-care activity.

Guided practice, review, and discussion, of mindfulness tools and techniques, designed to build and maintain personal resilience.



## Quick Reminder Graphic



**Recognize:** Warning signs and risk factors are signals to connect with someone who may need support.

**Listen:** Engage using empathy; connect through the shared human experience.

**Ask:** Directly ask about suicide.

**Support:** Whatever the answer, calmly reassure and support by offering hope and immediate resources.

**Resilience:** Self-care is an essential component of being a bridge on the journey of hope.

For immediate assistance:

**Call/Text 988 or 911**

# Building Hope In Honor Of My:



**COMPANY**

*Serenity*

**LAW FIRM**

*Community*

**FATHER**

**TEAM**

**BROTHER**

**UNIVERSITY**

**Friend**

*Neighbor*

**UNIT &  
BASE**

*Sister*

*Wife*

**Fraternity**

*husband*

*Mother*



**KEYS 365 Suicide Prevention Best Practices for the Legal Community**  
*Detailed Class Written Materials and Attorney-Specific Notes*

**OUTLINE SECTION 1**

*Slides 1-3*

Welcome: sign-in, distribution of written materials, attendee selection of provided class supplies, and KEYS 365 team introductions.

It's important to note that suicide prevention is a complex and sensitive topic.<sup>1</sup> Mental Health, suicidology, prevention, etc., are fields studied for entire careers. The KEYS 365 CLE class empowers participants with interactive engagement with the suicide prevention framework and aims to inspire participants to continue learning and practicing suicide prevention and resilience-building skills. KEYS 365 strives to provide an inclusive discussion environment and offer appropriate support resources for any participant who may be personally affected by the subject matter.

Class discussions, activities, and written materials for each section will reflect how accomplishing the class objectives will produce an overall outcome designed to enhance attorneys' abilities to: provide high levels of client services, positively affect case outcomes, promote resiliency both personally and in others, foster thriving law practices, have positive impacts on the communities they engage with both personally and professionally. *Additional information and details connecting class content with attorney-relevant facts are indicated in bold print and labeled: **NOTE.***

Review of background about KEYS 365 and the benefits to the legal community by attending the class in a dynamic, interactive group format. Group participation in the class exercises enables participants to interact live, network to build connections, receive real-time clarification, contribute individual experiences/questions, and create future opportunities for open, stigma-free communication and reflections about the class.

**NOTE:** Suicide prevention education designed to destigmatize mental health communication and build meaningful connections is crucial for attorneys and can yield many positive outcomes.<sup>2,3,4</sup> Examples include:

1. **Better Client Understanding:** Attorneys who prioritize destigmatizing mental health can better understand their client's needs, emotions, and concerns, thereby raising their level of effective legal representation.
2. **Enhanced Communication:** By promoting open and honest conversations about mental health, attorneys can create an environment where clients feel comfortable sharing relevant information. Improved communication allows attorneys to gather more comprehensive details for their cases.
3. **Improved Legal Advocacy:** Understanding clients' mental health challenges can help attorneys tailor their legal strategies to address specific needs or concerns. This personalized approach can lead to more successful and appropriate legal advocacy.

4. **Trust and Rapport:** Building meaningful connections with clients based on trust and understanding can lead to stronger attorney-client relationships. Clients are more likely to trust and confide in attorneys who demonstrate empathy and non-judgmental attitudes.
5. **Reduced Barriers to Seeking Legal Help:** When mental health is stigmatized, individuals may be hesitant to seek legal assistance due to fear of judgment or discrimination. Destigmatizing mental health communication can help remove or reduce these barriers, encouraging those in need to seek the help they require.
6. **Supportive Work Environment:** Destigmatizing mental health within the legal profession creates a more supportive work environment. Attorneys who feel comfortable discussing mental health challenges are more likely to seek help when needed, leading to improved well-being and job satisfaction.
7. **Enhanced Collaboration:** Building meaningful connections extends beyond client relationships. It also applies to working with colleagues and other professionals in the legal field. Collaborative efforts are more effective when all parties openly discuss mental health concerns and well-being.
8. **Mental Health Advocacy:** Attorneys have a unique platform to advocate for mental health awareness and resources. By destigmatizing mental health communication, they can help challenge societal misconceptions and contribute to positive change.
9. **Positive Public Perception:** Attorneys who actively work to destigmatize mental health communication are viewed more favorably by the public. This can increase referrals and positive word-of-mouth recommendations, ultimately benefiting their legal practice.
10. **Personal Well-being:** Attorneys, like anyone else, may experience mental health challenges. Destigmatizing mental health communication allows legal professionals to seek support and resources without fear of judgment or professional consequences.

In summary, destigmatizing mental health communication and building meaningful connections benefits clients and fosters a more empathetic and supportive legal community. It enhances the quality of legal representation, facilitates resilience, encourages early intervention, de-stigmatizes help-seeking behaviors, and provides opportunities to offer effective support and resources to colleagues, clients, legal professionals, and personal contacts, along with contributing to a healthier and more inclusive legal profession overall.

The skills provided in the KEYS 365 class are essential for attorneys because of the serious need for support regarding mental health, wellness, and suicide awareness/prevention, reflected in statistics. Examples from a wellness article<sup>6</sup> by Janet Van Cuyk, lawyer, social worker, and Assistant Director of the Virginia Judges and Lawyers' Assistance Program, include:

- Lawyers generally rank in the top ten professions for the rate of deaths by suicide and have six times the rate of the general population.
- Suicide is the third leading cause of death among lawyers.
- Lawyers are 3.6 times more likely to suffer from depression than the general population.



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- It has also been estimated that 40% of law students suffer from depression by the time they graduate.
- Lawyers have twice the rate of substance use disorders as the general population.
- In the general population (which includes attorneys, law office staff, court employees, judges, law enforcement, and clients), the 2020 suicide rate is 30% higher than the rate in 2000.

Regarding these statistics, Janet Van Cuyk wrote, "...prevention, awareness, and early intervention, work. I do know that culture and professionalism can support and encourage these practices. I also know that the statistics will remain static if no changes are made."<sup>6</sup>

**NOTE:** To create a positive shift in the statistics detailed above, high rates of attorney suicide, depression, substance abuse, etc., it is necessary to acknowledge that these issues are widespread and, if left unsupported, can have serious consequences and grave effects on the legal community. Completing the KEYS 365 class objectives (found below) will empower attorneys with critical skills needed to utilize the best-practice suicide prevention framework that can result in numerous positive outcomes for attorneys<sup>2,3,4</sup> including:

1. **Enhanced Awareness:** Attorneys gain a deeper understanding of suicide risk factors, warning signs, and protective factors. This increased awareness allows them to recognize potential signs of suicidal ideation in clients, colleagues, or others they interact with professionally and personally.
2. **Improved Communication:** Suicide prevention classes often emphasize effective communication techniques, including active listening and empathetic responses. Attorneys can apply these skills to build better rapport with clients, witnesses, and other parties involved in legal proceedings.
3. **Increased Sensitivity:** Suicide prevention classes promote sensitivity and respect when discussing mental health and suicide-related issues. Attorneys become more attuned to using appropriate language and avoiding stigmatizing remarks, creating a supportive and non-judgmental environment for clients.
4. **Enhanced Legal Advocacy:** Understanding the complexities of mental health and suicide can improve an attorney's legal advocacy, especially in cases where mental health issues are relevant. This knowledge allows them to effectively present stronger arguments and advocate for their clients.
5. **Personal Well-being:** Suicide prevention classes benefit not only the attorney's professional life but also their personal life. They can apply the knowledge gained to support friends, family, or anyone they encounter who might be experiencing mental health challenges.
6. **Professional Networking:** Attending a suicide prevention class provides an opportunity for attorneys to connect with mental health professionals and other attendees. This networking can lead to valuable collaborations and resources for handling mental health-related cases.

7. Positive Reputation: Lawyers who demonstrate a commitment to mental health awareness and suicide prevention are likely to be viewed more positively by clients, colleagues, and the general public. This positive reputation can contribute to the growth of their legal practice.
8. Contributing to Public Good: By attending a best-practice suicide prevention class, attorneys contribute to a broader societal effort to reduce suicide rates and promote mental health awareness. They play a role in creating a more compassionate and supportive community.

In summary, attending an interactive best-practice suicide prevention class can equip attorneys with essential skills and knowledge to address mental health and suicide-related matters sensitively and responsibly. These positive outcomes benefit both the attorney's professional development and the well-being of those they serve.

KEYS 365 Best Practices: Incorporating and utilizing guidelines accepted as most effective by leading mental health organizations. Best practices are sources of information openly disseminated by leading mental health organizations; some examples:

**CDC:** Centers for Disease Control and Prevention

**NAMI:** National Alliance on Mental Illness

**SAMHSA:** Substance Abuse & Mental Health Services Administration

**MFMER:** Mayo Clinic's Foundation for Medical Education & Research

### **Review of Class Objectives**

#### ***Participants will be able to:***

1. Identify the scope and impact of suicide on attorneys reflected in current statistics.
2. Differentiate three common myths from facts about suicide.
3. Use currently recommended verbiage around suicide and prevention.
4. Increase awareness of connection-building vs. separation-causing language.
5. Incorporate empathy when utilizing the best-practice suicide prevention framework.
6. Recognize risk factors and warning signs of suicide, both attorney-specific and general.
7. Meaningfully connect to determine if support is needed and (as appropriate) ask directly about suicide.
8. Identify and offer possible support resources.
9. Utilize several self-care and well-being tips and techniques which promote resilience.
10. Make a difference regarding suicide and mental health within the legal community.



**KEYS 365 Suicide Prevention Best Practices for the Legal Community**  
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**Review of Class Agenda:**

- Welcome
- Small Group Introductions
  - Activity - Water Bottle Resilience Information*
- Risk Factors and Warning Signs
  - Activity - Discussing and Identifying Signs/Factors*
- Connecting and Meaningful Conversations
  - Activity - Empathy and Asking Directly About Suicide*
  - Activity - Talking Openly About Mental Health*
- Offering Hope and Support Resources
  - Activity - Putting It All Together, Practice Dialog*
- Resilience Building and Self-Care
  - Activity - Hope Starts With You; Mindfulness Techniques*
- Conclusion

Discussion of the Mayo Clinic quote regarding scope of personal capability, "You are not responsible for preventing someone from taking their own life, but your intervention may help the person see that other options are available to stay safe and get treatment."<sup>7</sup>

It is important for attendees to realize they are not alone in their experiences and having their lives touched by suicide. To build class connection, attendees are invited to indicate if they have had a client, colleague, or someone they know personally die by suicide. This question is used to reinforce the Mayo Clinic quote<sup>7</sup> about scope of personal capability and the fact that, ultimately, there is no control over another person. Attorneys can try and make a difference by becoming educated about best practice ways to reach out to those who are struggling and offer hope and resources.

Review of suicide myth vs. suicide fact #1.

MYTH: Talking about suicide will lead to and encourage suicide.

FACT: Talking about suicide reduces stigma and allows individuals to: seek help, share their story with others, and rethink their options.<sup>8</sup>

**NOTE:** Understanding facts about suicide is important because it fosters confident utilization of suicide prevention tools. Talking factually and openly about suicide and prevention with colleagues, clients, and those in their legal and personal communities, will help to reduce stigma and shame around help-seeking behaviors, encourage support, allow for sharing stories, and rethinking options. All of these elements help attorneys to provide higher levels of client service, allow clients, colleagues, and legal professionals, who receive support, to be more engaged in factors that can positively affect case outcomes, promote resiliency by open encouragement to seek help for challenges, create a culture of support which is part of fostering a thriving law practice.<sup>4,9</sup>



## OUTLINE SECTION 2

*Slides 4-10*

Group activity, review of the best-practice suicide prevention framework

Interactive Activity: Attendees take turns introducing themselves to their small groups and reading aloud to the group the resilience-building information printed on their water bottles:

- Researchers have found that positive self-talk can be used to help with self-awareness, learning, work performance, managing anxiety, reducing stress, boosting confidence, and building better relationships.<sup>10</sup>
- Research about spending time in nature found that even just five minutes of activity, such as walking, jogging, or hiking in natural areas, resulted in improved self-esteem and mood.<sup>11</sup>
- Research shows that physical activity can boost mood, self-esteem, energy, and sleep quality, as well as reduce stress and the risk of clinical depression and dementia.<sup>12</sup>
- The Mayo Clinic reports that meditation can create a sense of calm, peace, and balance, benefitting both emotional well-being, overall health, and used to relax and cope with stress.<sup>13</sup>
- An estimated 184 billion apps will have been downloaded by 2024! There are many beneficial health and wellness apps. Read reviews and always consult professionals when seeking medical advice, diagnoses, or treatment. <sup>14</sup>
- Research shows that regular reading improves brain connectivity, cultivates empathy, aids in sleep readiness, reduces stress, lowers blood pressure and heart rate, fights depression symptoms, and helps prevent cognitive decline. <sup>15</sup>

**NOTE:** The QR code found on each water bottle used in this group activity is linked to the KEYS365.org Resilience webpage. QR code found on water bottle:



“Jumping Into Connection” activity is designed to build attorneys’ community connections and provide each group with six resilience-building tips that can be used and shared by attorneys with clients, colleagues, and others in their legal or personal community. These self-care and wellness techniques are designed to assist in supporting resiliency to better cope with some of the many intense stressors facing attorneys, clients, and the legal community due to the nature of their work and the legal process.<sup>16</sup> Some stressors include:

- High workload and time pressures: Lawyers and legal professionals often face heavy caseloads, demanding deadlines, and long working hours, leading to constant time pressure and stress.
- The emotional burden of cases: Dealing with emotionally challenging cases, such as criminal defense, family law, or personal injury, can take a toll on lawyers, clients, and legal professionals.
- Professional responsibility and ethical dilemmas: Legal professionals may grapple with ethical decisions and the responsibility of representing clients whose values or actions may conflict with their own.



## **KEYS 365 Suicide Prevention Best Practices for the Legal Community**

### *Detailed Class Written Materials and Attorney-Specific Notes*

- Client confidentiality concerns: Lawyers maintain client confidentiality, but this can lead to stress when they are aware of potentially harmful or illegal actions their clients have taken.
- Public scrutiny and criticism: High-profile cases may subject lawyers, clients, and legal professionals to media attention and public scrutiny, which can be overwhelming and distressing.
- Courtroom pressure and performance anxiety: Legal professionals and clients may experience stress and anxiety during cases in court or during negotiations.
- Lack of control over case outcomes: Lawyers, clients, and legal professionals often face uncertainty about case outcomes, which can be stressful, particularly when significant consequences are at stake.
- Financial pressures: Legal services can be expensive, leading to financial stress for both clients and lawyers.
- Impact on personal life and relationships: Long working hours and emotional demands can strain personal relationships for lawyers, clients, and legal professionals.
- Compassion fatigue and burnout: Lawyers and legal professionals may experience compassion fatigue, leading to emotional exhaustion and reduced ability to empathize with clients.
- Dealing with difficult clients or other legal professionals: Challenging interactions with clients or other legal professionals can produce anxiety and increased stress levels.
- Navigating complex legal processes: Understanding and navigating the legal system can be overwhelming and stressful for clients, especially those without legal knowledge or resources.

The KEYS 365 best-practice suicide prevention framework includes steps recommended by leading mental health organizations, including: Identifying risk factors and warning signs of suicide, having open conversations to ask directly about suicide, and offering hope and support resources. KEYS 365 also reviews options for offering support when: the situation is not appropriate to ask directly about suicide, responding to someone who is actively thinking about suicide, responding when someone is struggling with challenges but not thinking about suicide, and responding when someone declines support. KEYS 365 provides a “quick review” graphic to print or download; many organizations post pocket guides and graphics that can be helpful in remembering information during stressful times; additional examples may be viewed at:

<https://www.psychiatry.org/patients-families/suicide-prevention>

<https://store.samhsa.gov/product/SAFE-T-Pocket-Card-Suicide-Assessment-Five-Step-Evaluation-and-Triage-for-Clinicians/sma09-4432>

[https://www.army.mil/article/154526/preventing\\_soldier\\_suicides\\_one\\_month\\_of\\_awareness\\_wont\\_fix\\_the\\_problem](https://www.army.mil/article/154526/preventing_soldier_suicides_one_month_of_awareness_wont_fix_the_problem)

**NOTE:** Interactive engagement with, and understanding of, the best practice suicide prevention framework and connecting through empathy (non-judgmental understanding based on our shared humanity) will assist in positive outcomes which will help attorneys to:

- Maintain strong legal teams (government or private) through cultivating personal resiliency and an accepted culture of early interventive support for the many challenges facing attorneys (noted previously)
- Most effectively serve clients in need of support resources. By connecting clients with meaningful support resources, clients will be better equipped to complete court-mandated requirements and actively participate in the desired outcome of their case.
- Build trust and stronger relationships with colleagues, clients, and other legal professionals. This outcome is facilitated when challenges are responded to with empathy, non-judgmental attitudes, and offers of connections to support resources.
- Use the suicide prevention framework also to assist others in personal relationships. Non-work relationships can have substantial effects, which can crossover to impact work significantly.

The class definition of Empathy: Connections based on the shared human experiences of struggle and strength. Renowned author Brenè Brown offers: "Empathy is connecting with people, so we know we're not alone when we're in struggle. Empathy is a way to connect to the emotion another person is experiencing..."

**NOTE:** Integrating the lens of empathy into the suicide prevention framework is crucial for attorneys for several compelling reasons,<sup>17</sup> including:

1. Client-Centered Approach: Empathy allows attorneys to understand their clients' emotions, thoughts, and experiences better. By adopting a client-centered approach, attorneys can tailor their suicide prevention efforts to meet their client's specific needs and challenges.
2. Building Trust and Rapport: Demonstrating empathy creates a sense of trust and rapport between attorneys and their clients. Clients are more likely to open up about their mental health concerns and suicidal ideation when they feel understood and supported.
3. Effective Communication: Empathy enhances communication skills, enabling attorneys to actively listen and respond sensitively to their client's concerns. This fosters a more open and productive dialogue, which is vital when discussing sensitive topics such as suicide.
4. Reducing Stigma: An empathetic approach helps reduce the stigma associated with mental health and suicide. Attorneys who display empathy contribute to a more compassionate and understanding legal community, promoting positive attitudes about mental health challenges.
5. Identifying Underlying Issues: Empathy allows attorneys to look beyond the surface and identify underlying issues that may contribute to a client's suicidal thoughts. This understanding helps in developing comprehensive legal strategies that address the root causes of the client's distress.



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6. Mental Health Advocacy: Attorneys who integrate empathy into the suicide prevention framework become advocates for mental health awareness and support. They play a role in challenging societal attitudes and fostering a more inclusive and empathetic legal profession.
7. Reducing Emotional Distress: Empathetic interactions with clients can reduce emotional distress for both the client and the attorney. Engaging with difficult emotions in a supportive manner helps prevent emotional burnout and compassion fatigue.
8. Enhancing Professional Satisfaction: Attorneys who approach suicide prevention with empathy often find their work more meaningful and rewarding. Helping clients through difficult times and contributing to their well-being can be a source of personal and professional satisfaction.
9. Positive Outcomes for Clients: An empathetic suicide prevention framework is more likely to lead to positive outcomes for clients, including improved mental health, reduced suicidal ideation, increased engagement in therapeutic interventions, and court-mandated requirements.
10. Promoting Resilience: Empathy contributes to the development of a resilient legal practice where attorneys can effectively navigate challenging cases and personal experiences related to mental health and suicide.

In summary, integrating the lens of empathy into the suicide prevention framework empowers attorneys to provide more effective and compassionate support to their clients. It creates a legal environment that is understanding, non-stigmatizing, and focused on the well-being of those seeking legal assistance.

Recommended verbiage when discussing suicide evolves as new research is factored in. The reference chart<sup>18</sup> below lists outdated vocabulary, current recommendations, and reasons why it is the suggested phrasing.

INSTEAD OF THIS...	SAY THIS...	WHY
commit suicide committed suicide	died by suicide lost their loved one to suicide	<ul style="list-style-type: none"> <li>• “Commit” implies a sin or crime has taken place, which reinforces stigma and shame.</li> <li>• “Died by suicide” reduces stigma by not assigning blame.</li> </ul>
successful or unsuccessful suicide completed or failed suicide	died by suicide survived a suicide attempt	<ul style="list-style-type: none"> <li>• “Successful” or “completed” implies a positive result instead of reflecting the reality of a traumatic loss.</li> <li>• “Died by” or “survived” simply and accurately states the fact.</li> </ul>

epidemic skyrocketing	rising increasing	<ul style="list-style-type: none"> <li>• "Epidemic" may cause anxiety and heightened emotion along with perpetuating ideas that it is unavoidable and more prevalent than it is.</li> <li>• "Rising" or "increasing" help to provide accurate descriptions without creating unnecessary feelings of fear or other negative responses.</li> </ul>
(Name) is suicidal.	(Name) is thinking of suicide.	<ul style="list-style-type: none"> <li>• It is important to separate the current condition, thought, diagnosis, or experience, from the identity of the person.</li> </ul>
He is suicidal. They are a schizophrenic. They are mentally ill. They are addicts. He is homeless.	He is thinking of suicide. They have a mental illness or are living with a mental illness. People with mental illness... or People addicted to... People with addiction... He is experiencing homelessness.	<ul style="list-style-type: none"> <li>• It is important to separate the current condition, thought, diagnosis, or experience, from the identity of the person.</li> </ul>

Review of commonly used phrases that separate and connect: 19

**LANGUAGE THAT SEPARATES**

- MAKING IT ABOUT YOU - Well, one time when I...
- DIMINISHING - Things could be worse, at least...
- DIRECTIONAL QUESTIONING - You're fine, aren't you?
- (UNSOLICITED) ADVICE - Here's what you should do...
- PITY - Poor thing, I feel sorry for you...
- DISMISSING - Calm down; you'll get over it...

**LANGUAGE THAT CONNECTS**

- CLARIFYING - To make sure I understand, it sounds like...
- COMING ALONGSIDE - I'm here for you. You are not alone.
- CHECKING IN - I'm here to listen; how are you really doing?
- RECOGNIZE COURAGE - It is brave to share...
- SHARED HUMANITY - I understand pain; this must be hard.

**NOTE:** Using currently recommended verbiage along with phrases that promote connection (rather than causing separation) around suicide prevention benefits attorneys professionally and fosters a



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more compassionate, respectful, and understanding legal environment in many ways, 2,3,4 including:

1. Sensitivity and Compassion: Employing appropriate language demonstrates sensitivity and compassion toward individuals who may be experiencing suicidal thoughts or have been impacted by suicide. This approach creates a more supportive and understanding environment for clients, witnesses, and other parties involved in legal proceedings.
2. Avoiding Stigmatization: Outdated or insensitive language can perpetuate the stigma surrounding mental health and suicide. By using recommended verbiage, attorneys can help reduce the stigma associated with suicide and mental health issues, encouraging open conversations and better support for those in need.
3. Communicating Effectively: Recommended suicide prevention language is designed to communicate more effectively and respectfully about sensitive topics. Using such language can help attorneys convey their points clearly while avoiding misunderstandings or unintentionally causing distress.
4. Preventing Harmful Triggers: Certain vocabulary can act as triggers for individuals who have experienced trauma or suicidal thoughts in the past. Following recommended verbiage helps attorneys avoid using harmful language that could potentially exacerbate distress or emotional harm.
5. Building Trust: Clients are more likely to trust attorneys who demonstrate understanding and respect for sensitive issues. By using appropriate language, attorneys can foster a stronger attorney-client relationship and create a safer space for clients to discuss their concerns openly.
6. Legal Advocacy: In cases where mental health is relevant, using respectful and updated language can strengthen an attorney's advocacy efforts. It can help frame arguments more effectively, avoiding any undermining of the client's position due to insensitive language.
7. Setting a Professional Standard: Attorneys serve as role models in the legal profession. By adhering to currently recommended verbiage, they set a professional standard that can positively influence others in the legal community and beyond.
8. Contributing to Public Awareness: Lawyers are influential figures in society. By adopting and promoting recommended suicide prevention language, attorneys can contribute to raising awareness about mental health and suicide prevention on a broader scale.

Review of suicide myth vs. suicide fact #2.

MYTH: Most suicides happen suddenly without warning.

FACT: Warning signs precede most suicides: Verbal – (Direct & Indirect), Behavioral, Situational, and Emergency<sup>20</sup>

**NOTE:** Attorneys with suicide prevention education may uniquely notice signs of suicide due to the nature of their profession and the interactions they have with clients, witnesses, other parties involved in legal proceedings, and personal relationships.

Some reasons include:

1. Confidentiality and Trust: Clients often share intimate and personal details with their attorneys due to the attorney-client privilege. This level of trust allows attorneys to gain insights into their clients' emotional struggles and potential suicidal ideation.
2. Intensive Communication: Attorneys engage in extensive communication with their clients, which can involve discussions about personal and emotional issues. This frequent and detailed interaction provides opportunities for attorneys to identify any signs of distress or suicidal thoughts.
3. Legal Interventions: In cases where mental health is relevant, attorneys may represent clients involved in involuntary commitments or mental health treatment. During these proceedings, attorneys can come across clear indicators of suicide risk.
4. Understanding of Legal Issues: Attorneys are trained to analyze complex situations and identify potential risks and vulnerabilities. They may recognize signs of suicide in legal documents or testimonies, even when it is not explicitly stated.
5. Interactions with Vulnerable Clients: Attorneys often work with vulnerable populations, such as those involved in family law, immigration cases, or criminal defense.
6. Relationship with Mental Health Professionals: Attorneys frequently collaborate with mental health professionals during their cases. These professionals may share relevant information about a client's mental health, including any indications of suicidal ideation.
7. Observing Emotional Cues: Attorneys are trained to observe and analyze verbal and non-verbal cues during interactions. They may notice subtle changes in behavior or mood that could signal potential suicide risk.

In Summary, the unique role of attorneys as trusted advisors and advocates for their clients, combined with their legal knowledge and understanding of human behavior, positions them to notice signs of suicide that may not be evident to others. This awareness allows them to take appropriate actions to support their client's well-being and safety.

### **OUTLINE SECTION 3**

Slides 11-23

Review of categories of risk factors and warning signs of suicide for the upcoming group exercise:

- Direct Verbal Statements
  - The statement is clearly about suicide.
- Indirect Verbal Statements
  - Follow-up questions are needed for clarification of meaning.

- Situations
  - Circumstances out of a person's scope of control.
- Behaviors
  - Observable actions exhibited.
- Emergencies
  - Suicidal intent that requires immediate and appropriate action
  - IMPORTANT: personal safety is mandatory at all times when supporting others.
  - KEYS 365 main focus is on early intervention.
  - Recommendations from the Mayo Clinic<sup>7</sup>:
    - \*If someone has attempted suicide:
      - Don't leave the person alone.
      - Call 911 or your local emergency number right away. Or, if you think you can do so safely, take the person to the nearest hospital emergency room yourself.
      - Try to find out if the person is under the influence of alcohol or drugs or may have taken an overdose.
      - Tell a family member or friend right away what's going on.
    - \*If a friend or loved one makes you believe the person might attempt suicide:
      - don't try to handle the situation alone.
      - **Get help from a trained professional as quickly as possible.** The person may need to be hospitalized until the suicidal crisis has passed.
      - **Encourage the person to call a suicide hotline number.**
        - In the U.S., anyone needing help can call or text 988 to reach the [988 Suicide & Crisis Lifeline](#), available 24 hours a day, seven days a week. Or use the [Lifeline Chat](#). Services are free and confidential.
        - U.S. veterans or service members who are in crisis can call 988 and then press "1" for the [Veterans Crisis Line](#). Or text 838255. Or [chat online](#).
        - The Suicide & Crisis Lifeline in the U.S. has a Spanish language phone line at 1-888-628-9454 (toll-free).

**NOTE:** *The KEYS 365 suicide prevention class provides the stated class objectives.* Attorneys must thoroughly review their state's rules and regulations pertaining to confidentiality in situations involving suicide and mental health. Suicide-related cases may involve sensitive and private information about the individual's mental health, medical history, and other personal details. It is essential for attorneys to understand the extent to which they can disclose such information without violating client confidentiality laws. It is crucial to navigate the delicate balance between protecting their client's privacy and ensuring appropriate communication with mental health professionals, crisis intervention teams, or relevant authorities. Familiarizing themselves with the specific guidelines in their state ensures that attorneys can act responsibly and ethically while providing the necessary support and intervention to clients at risk of self-harm. Additionally, being well-informed about



confidentiality rules helps attorneys avoid potential legal repercussions and uphold the trust their clients place in them during these sensitive and challenging situations. Additionally, personal safety is of utmost importance and a mandatory consideration when providing support in any situation related to suicide. While it is essential to be compassionate and helpful, individuals assisting someone in crisis must prioritize their own safety, ensuring they can effectively intervene and seek appropriate help without putting themselves at unnecessary risk. Engaging in crisis situations should be done with caution, and individuals should seek professional assistance or contact emergency services when needed. By maintaining personal safety, those providing support can better assist the person in crisis and contribute to a safer and more effective intervention process.

Risk factors and warning signs significant to the legal community<sup>16</sup> are used to demonstrate examples of different categories, including:

- Situation: Unemployment
  - Downsizing
  - bar or client complaints
  - loss of license
    - loss of law license
    - loss of trade license
    - loss of driver's license
  - pending criminal charges
  - conviction of criminal charges
- Indirect verbal statement: repeated statements about lack of sleep
- Behavior: changes in
  - quality of work
  - ability to meet deadlines
  - response time to communication
  - ability to manage appointments
  - ability to effectively collaborate with others

**NOTE:** Guided group discussion to allow attending attorneys the opportunity to talk about additional risk factors and warning signs, share experiences, or ask questions. This is an important time for group members to build connections by contributing and actively listening.

Interactive Activity: Identifying risk factors and warning signs.

In pairs or small groups, sort 23 common risk factors and warning signs (provided in the envelope), into the four categories below. The goal is not to be able to remember the category but to engage in a multi-faceted learning approach to becoming familiar with the risk factors and warning signs.

Attorneys will be reading the information aloud, discussing which category to select, and manually manipulating the cards as they are sorted.



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- **Direct Verbal:** Statements in which it is clear that a person is talking about taking their own life.
- **Indirect Verbal:** Statements which need a follow-up question to determine if a person is talking about wanting to die by suicide.
- **Behaviors:** Observable things a person is doing that may indicate thoughts of suicide and/or the need for support resources.
- **Situations:** Conditions beyond a person's control that may indicate thoughts of suicide and/or the need for support resources.

**NOTE:** Guided discussion about risk factors and warning signs; attorneys are asked to contribute to the conversation by stating feelings that might be associated with experiencing one or more of the risk factors and warning signs (feelings also listed on slide). The facilitator will highlight connecting with individuals with diverse life experiences through empathy and shared humanity. The facilitator will also include the common bond and connection that emerges from acknowledging universal feelings such as loneliness, disappointment, shame, vulnerability, heartbreak, and more. Guided group discussion will allow attending attorneys the opportunity to share experiences or ask questions. This an important time for group members to build connections by contributing and actively listening.

**OUTLINE SECTION 4**

*Slides 24-31*

Asking about suicide can be challenging for many people. 21 This section will provide some helpful information when having a conversation about suicide and the opportunity to use practice dialog for asking about suicide.22

**A: Ask Directly** – Ask about suicide in a direct manner. This can be the start of fostering hope; ask at the first appropriate opportunity. It may be necessary to create the opportunity if one is not likely to happen organically. Make sure there is adequate time and privacy for the discussion.m

**B: Be Clear** – it is necessary to use words that make it clear you are talking about suicide.

Example of a direct but **unclear** question: Are you thinking about hurting yourself?

Example of a **direct and clear** question: Are you thinking about suicide?

Share why you are concerned and connect through the warning signs and risk factors. It is helpful to start the conversation with genuine concern and kind curiosity – tone of voice matters!

**C:** Calmly Reassure – Try and remain calm and nonjudgmental regardless of the response. Reassurance about their sharing is key to moving forward. Avoid ending the conversation before offering support. Remember, they may not share what is really happening or only part of the story. The point of the conversation is to find out if they are thinking about suicide and be the bridge to appropriate support resources.

**NOTE:** Attorneys may face the challenging yet essential task of being non-judgmental when discussing and listening to a person's struggles with mental health or suicide. While they may be trained to analyze situations critically, adopting a non-judgmental stance is helpful in creating a safe and supportive space for emotions to be expressed openly. Appropriately discussing sensitive issues like mental health and suicide requires attorneys to set aside personal biases or preconceptions, as judgment can inadvertently hinder open communication and discourage sharing. An empathetic and non-judgmental approach allows attorneys to understand unique circumstances better, leading to more accurate assessments, appropriate support resources, and (for clients) informed legal strategies that address both the legal and mental health aspects.

**NOTE:** Additionally, it is important to differentiate between conversations providing performance feedback and/or work reviews from connecting with someone on a personal level to see if support resources are needed. Work performance discussions and clear feedback communications are essential for professional growth, integral in building thriving businesses, and critical to maintaining a company's standards. It is, however, equally crucial to recognize that when an individual's work performance changes, it may indicate possible underlying personal struggles. Understanding that work performance can be influenced by personal challenges helps attorneys build trust with their colleagues, clients, and other legal professionals, by encouraging open communication and empathy. By engaging in both professional feedback and human connection, attorneys can foster a culture that values both optimal productivity and the holistic well-being of everyone involved. Taking the time to connect on a human level and genuinely inquire about well-being fosters a compassionate and supportive work environment. It creates a more resilient and harmonious legal community.

Interactive Activity: In pairs, use the practice dialog and take turns asking directly about suicide. The practice question will be integrated into the full dialog in the next section. Asking about suicide is difficult for many people; this exercise provides an opportunity to practice asking directly, calmly, and clearly:

**“Sometimes, when people are really struggling, they have thoughts of suicide. So I feel it’s important to ask: have you been thinking about killing yourself?”**



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**NOTE:** Attorneys have demanding schedules and diverse caseloads and often find themselves constantly engaged in a wide array of situations. Their days are filled with multifaceted challenges, from intricate legal proceedings and intense negotiations to client consultations and administrative tasks. They navigate through various legal matters, each requiring meticulous attention to detail and a profound understanding of complex regulations. Moreover, attorneys often interact with a diverse range of clients and colleagues, each with unique backgrounds and needs, which can make it challenging to connect. \*If an attorney does not have time, or a situation/relationship dynamic prevents asking about concerns regarding well-being, alternative positive actions can still be taken. As appropriate to the relationship and situation:

- make an effort to check in with them regularly through brief and supportive conversations.
- encourage them to seek professional help or provide information about available mental health resources.
- consider reaching out to someone you trust, like a supervisor or HR representative, to express your concerns confidentially and seek guidance on the best course of action.

Remember, any small gesture of care can make a difference, even when time is limited.

Interactive activity: In pairs, take turns, and practice offering a resource for someone who may be in need of support around suicide or mental health.

**“We all have times where we struggle and feel overwhelmed; sometimes, people may also have thoughts of suicide. Mental health support can make a big difference, so I feel it’s important to make sure you know about the 24/7 lifeline, which is available by calling or texting 988. You can reach out for yourself or if you are concerned about someone else.”**

**NOTE:** Guided group discussion to allow attending attorneys the opportunity to talk about situations where they have asked someone directly about suicide or encountered a situation where they could not ask about suicide. This is an important time for group members to build connections by contributing and actively listening.

**OUTLINE SECTION 5**

*Slides 32-36*

Review of suicide myth vs. suicide fact #3.

MYTH: Talk therapy and medications don’t work.

FACT: Treatment can and does work. Finding the best treatment can take some time, but the right treatment can greatly reduce the risk of suicide. 23

From the Centers for Disease Control and Prevention<sup>24</sup>, "Suicide is rarely caused by a single circumstance or event. Instead, a range of factors can increase risk. These risk factors are situations or problems that can increase the possibility that a person will attempt suicide." Some include:

- Previous suicide attempt
- History of depression and other mental illnesses
- Serious illness or chronic pain
- Criminal/legal problems
- Job/financial problems or loss
- Impulsive or aggressive tendencies
- Substance misuse
- Current or prior history of adverse childhood experiences (ACEs)
- Sense of hopelessness
- Violence victimization and/or perpetration
- Bullying
- Family/loved one's history of suicide
- Loss of relationship(s)
- High conflict or violent relationships
- Social isolation
- Lack of access to healthcare
- Suicide cluster in the community
- Community violence
- Historical trauma
- Discrimination
- Stigma associated with help-seeking and mental illness
- Easy access to lethal means of suicide among people at risk
- Unsafe media portrayals of suicide

-Centers for Disease Control and Prevention<sup>24</sup> <https://www.cdc.gov/suicide/factors/index.html>

**NOTE:** Attorneys encounter numerous risk factors and warning signs for suicide in their daily professional interactions. The stress, emotional intensity, and high-pressure nature of legal work can expose them to individuals facing mental health challenges. Understanding that hope and help are available is crucial in these situations. By recognizing the signs and encouraging open conversations, attorneys can play a significant role in connecting those at risk with appropriate support systems and resources. Prioritizing mental health and fostering a compassionate legal environment can make a positive difference in the lives of those they serve.<sup>3,16</sup>



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A wide variety of resources are available, and it is helpful to know where you can get started. Be the bridge to support! Some options to start unlocking hope are listed below; they can assist in getting to more specialized resources:

From 988Lifeline.org: "The 988 Suicide & Crisis Lifeline is a national network of local crisis centers that provides free and confidential emotional support to people in suicidal crisis or emotional distress 24 hours a day, 7 days a week in the United States. The Lifeline offers an interpretation into over 240 languages".

From 211.org (national) and 211Virginia.org (state): "211 is an easy-to-remember phone number connecting people with free information on available community services. (continued) When you dial 2-1-1, a trained professional listens to your situation and suggests sources of help using one of the largest databases of health and human services in Virginia." Services for non-English speakers are available.

From Warmline.org (click directory for state numbers): "A warm line is an alternative to a crisis line that is run by "peers," generally those who have had their own experiences of trauma that they are willing to speak of and acknowledge. Unlike a crisis line, a warm line operator is unlikely to call the police or have someone locked up if they talk about suicidal or self-harming thoughts or behaviors."

\*Reminder: If you believe someone has a plan to take their life or an attempt is in progress, it is critical to involve professional support. Call/text 988, call 911 or go to the nearest emergency care. If possible, go to or remain with the individual, provided your personal safety is not at risk. Do your best to stay calm, listen without judgment, and connect with appropriate professional support.

KEYS 365 focuses on a culture of support through early intervention, and the sample scenario used in the interactive activity will reflect practice at this stage: Person A reaches out to Person B, regarding risk factors/warning signs that have been noted. Person B will respond that they have been thinking about suicide but have not taken any steps or made a plan to end their life.

The sample dialog opens in a generic way to highlight to participants that the concerns will be unique to each individual. The dialog is intended to provide practice and vocabulary that can be incorporated with the unique style and "voice" of the person reaching out. The sample dialogue illustrates that effective word choice does not need to be complicated. Often, the challenge is the courage, patience, and empathy required to have these sometimes challenging conversations.

Interactive Activity - In pairs:

- With one partner as *Person A* and one as *Person B*, read only the first page and stop.
- There will be short guided group discussions after each of the three pages.

- The practice dialogue opens with intentionally generic verbiage. In a real conversation, a warm opening and noted warning signs (appropriate for the situation) would be added.

#### PAGE ONE - ENGAGE & CONNECT

\*In a private setting, use a warm greeting, and remember that your tone matters!

Person A:

I'm glad you have time to talk because I want to check in with you. There have been some really difficult things happening in your life, and it's not just you; every one of us would be having a hard time. It also seems like there have been some changes in your behavior, and then you said that you're exhausted all the time because you can't sleep. I'm concerned about you; how are you really doing?

Person B:

I don't know...things are pretty awful right now...but you're busy; I'm fine.

Person A:

When I've had tough times, having someone to talk with made all the difference. I care about you and have time to listen to whatever you're comfortable sharing.

Person B:

Everything is totally overwhelming... Everyone would be better off if I were gone...I just can't take feeling like this anymore.

Person A:

I want you to know you are not alone in this. Sometimes when people are really struggling, they have thoughts of suicide.

So I feel it's important to ask: Have you been thinking about killing yourself?

*(Note: Regardless of the answer given, remember support is important!)*

Person B:

I'm exhausted and stressed out all the time. There is just no hope. I really don't see a way through this. Yes, I have been thinking about killing myself.

Person A:

Thank you for trusting me with your feelings. I can hear how painful things are right now.

Have you taken any steps toward ending your life, like making a plan?

#### **END OF PAGE ONE - STOP FOR REVIEW**



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PAGE TWO - OFFER SUPPORT & HOPE

Person B:

No, I haven't done anything yet. I'm just so overwhelmed and don't know what to do. It feels like everything would be better if I were dead.

*(Note: The individual may not share the whole situation or even what is really happening. Regardless of their response, listen and do your best to stay present and judgment-free. Your focus is not to fix or take on their challenges. Your goals are to be present, offer resources, and be the bridge to support.)*

Person A, Possible Options:

We all need help at different times and for different reasons. This is important, and there is no judgment from me. I want to support you with resources as soon as possible. I have some ideas; how about we start together now?

*OR*

I haven't been in your exact situation, but everyone, including me, needs support at one time or another. This is serious, and getting the right help is really important. I have some ideas; how about we start together now?

*OR*

I want you to know that you are not alone in this. I have some ideas about resources for getting support; how about we start together now?

*\*As appropriate, substitute "start" with: "call" or "text" or "go".*

*How about we call together now?*

*How about we go together now?*

*How about we text together now?*

*(Let them know you will follow up by making a specific check-in plan.)*

Person A:

I'm grateful that you shared how you are feeling, and I want you to know that you are important to me. I am going to check in with you again tomorrow. Remember, you are not alone in this.



## **END OF PAGE TWO - STOP FOR REVIEW**

*\*When you have asked someone about suicide, remember to connect with trusted follow-up support and share appropriately about the conversation. This can provide additional perspectives about the situation and added support for the individual who is struggling. Having a "debrief" conversation is also valuable self-care for you!*

## **PAGE THREE - RESPECTFULLY ADDRESS RESPONSES**

*\*The individual may not want to engage support resources at the moment, and at times extra prompting is helpful. Below are ways to respectfully address some common responses.*

Person B: I don't know. What if they can't help me?

Person A: Well, there are no guarantees, but the first step is to try something. If it isn't the right fit, there are a lot of options out there. You are not alone in this.

Person B: Everyone has problems. I'm fine and don't want or need help!

Person A: I agree that everyone does have problems, and I completely respect how you feel. In case you change your mind, would it be ok for me to give you a couple of options for resources? I want you to know you are not alone in this.

Person B: I'm embarrassed about what people will think of me.

Person A: I know what you mean; sharing about problems in order to get support makes us all feel vulnerable, but it is also a really brave thing to do. There are some great options over the phone. Why don't we start with a call or text?

Person B: I don't want to go or call alone.

Person A: Let's go or call together. You are not alone in this.

## **END OF PAGE THREE - STOP FOR REVIEW**

*\*Important Reminder: If you believe someone has a plan to take their life or an attempt is in progress, it is critical to involve professional support. Call/text 988, call 911, or go to the nearest emergency care. If possible, go to or remain with the individual, provided your personal safety is not at risk. Do your best to stay calm, listen without judgment, and connect with appropriate professional support.*

**NOTE:** Attorneys often find themselves in unique positions to recognize signs of distress or suicide risk in their clients or colleagues. Having sample dialogue at their disposal equips them with simple example language to approach these conversations effectively. By providing clear and empathetic



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communication, attorneys can guide individuals toward available suicide support resources, such as crisis helplines or mental health professionals. This proactive approach fosters a supportive legal community and reinforces the message that mental health matters and that help is accessible and attainable.

**OUTLINE SECTION 6**

*Slides 32-35*

Hope is undeniably a key factor in preventing suicide. Attorneys, among others, can play a vital role in promoting hope as a strategy that can be taught. As hope is cultivated, the journey toward recovery becomes more achievable, reinforcing the message that even in the darkest times, there is support and a way forward.

The acronym discussed below can be used to remember steps to cultivate hope!

**HOPE: MORE THAN A FEELING!**

**Heartfelt Goal** - one that is important, desired, and attainable by the person setting it.

**Options** - Realistic possibilities to attain the goal.

**Plan Support** - Plan for necessary assistance in attaining the goal.

**Engage** - Work on the plan!

HOPE - Starts with YOU!

Self-care through stress management techniques will be introduced, including using the stress ball selected at the beginning of the class, a breathing exercise app, and simple exercises requiring no tools. The KEYS 365 Resilience webpage: <https://www.keys365.org/resilience> reviews the discussed techniques and access to many more!

**NOTE:** The importance of attorneys practicing self-care and paying attention to their own mental health and personal well-being is critical. The demanding nature of legal work, coupled with the emotional intensity of the cases they handle, can take a toll on their mental and emotional health. By prioritizing self-care, attorneys can recharge and maintain their resilience, ultimately enhancing their ability to provide effective legal representation. Recognizing the signs of burnout, stress, or compassion fatigue is essential, as it allows them to seek the necessary support and resources to maintain their well-being. Engaging in activities that promote relaxation, seeking professional help when needed, and fostering a healthy work-life balance are crucial steps in ensuring attorneys can continue to excel in their profession while also taking care of themselves. 2,3

## OUTLINE SECTION 6

Slide 39

### Question and Answer Discussion

**NOTE:** Guided group discussion to allow attending attorneys the opportunity to ask questions and share additional resources. This is an important time for group members to build connections by contributing and actively listening.

Review of accomplished objectives and call to action:

Attorneys! Your unique skills and positions of influence place you in a pivotal position to make a difference in suicide prevention and mental health. The legal community can play a vital role in creating a compassionate and supportive environment for those struggling with mental health challenges. We urge you to get involved, raise awareness, and destigmatize conversations about mental health. Take the time to practice suicide prevention strategies, learn about resources, and make it a priority to prioritize self-care and mental well-being within your own lives, practices, and the legal community. By joining the movement for mental health and wellness, you will not only be offering enhanced, comprehensive services to your clients, but you can help save lives, support vulnerable individuals, and contribute to a more empathetic and understanding legal community. Together, let's work towards a brighter and healthier future for everyone.

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**Hope Starts With YOU!**

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**BEST PRACTICES**

Incorporating and utilizing guidelines accepted as most effective by leading mental health organizations.

**CDC:** Centers for Disease Control and Prevention  
**NAMI:** National Alliance on Mental Illness  
**SAMHSA:** Substance Abuse & Mental Health Services Administration  
**MFMER:** Mayo Clinic's Foundation for Medical Education & Research

**Mayo Clinic:** *"You're not responsible for preventing someone from taking their own life – but your intervention may help the person see that other options are available to stay safe and get treatment."*



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**MYTH & FACT**

**MYTH:** Talking about suicide will lead to and encourage suicide.

**FACT:** Talking about suicide reduces stigma and allows individuals to:

- seek help.
- share their story with others.
- rethink their options.

*SAMHSA: Help prevent suicide.*

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**JUMPING**  
**WADING INTO CONNECTION**




Share your name, firm, & resilience tip with your group.

KEYS

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**SUICIDE PREVENTION FRAMEWORK**

**RECOGNIZE**      **CONNECT**      **SUPPORT**



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**SUICIDE PREVENTION & EMPATHY**

Connections based on the shared human experiences of struggle and strength.

**RECOGNIZE**      **CONNECT**      **SUPPORT**



KEYS

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## **SUICIDE PREVENTION & EMPATHY**

Connections based on the shared human experiences of struggle and strength.

*"Empathy is connecting with people, so we know we're not alone when we're in struggle. Empathy is a way to connect to the emotion another person is experiencing..."*

-Brenè Brown-

KEYS

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## **LANGUAGE THAT SEPARATES**

**DIMINISHING** - Things could be worse, at least...

**DISMISSING** - Calm down, you'll get over it...

**PITY** - Poor thing, I feel sorry for you...

**MAKING IT ABOUT YOU** - Well, one time when I...

**DIRECTIONAL QUESTIONING** - You're fine, aren't you?

**(UNSOLICITED) ADVICE** - Here's what you should do...

KEYS

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## **LANGUAGE THAT CONNECTS**

**CLARIFYING** - To make sure I understand, it sounds like...

**RECOGNIZE COURAGE** - It is brave to share...

**CHECKING IN** - I'm here to listen; how are you really doing?

**COMING ALONGSIDE** - I'm here for you. You are not alone.

**SHARED HUMANITY** - I understand pain, this must be hard.

KEYS

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

## MYTH & FACT

**MYTH:** Most suicides happen suddenly without warning.

**FACT:** Warning signs precede most suicides.

- Verbal - *Direct & Indirect*
- Behavioral
- Situational
- Emergency

NAMI: Common myths about suicide debunked.

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## RISK FACTORS & WARNING SIGNS

**DIRECT VERBAL**



**INDIRECT VERBAL**



**SITUATIONS**



**BEHAVIORS**



**EMERGENCIES**





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## RISK FACTORS & WARNING SIGNS

**DIRECT VERBAL**



**INDIRECT VERBAL**



**Direct:** Statements about wanting to die by suicide.

**Indirect:** Statements that indicate possible thoughts of suicide but need clarification.

**EMERGENCIES**





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**RISK FACTORS & WARNING SIGNS**

**BEHAVIORS**  
 Observable actions that may indicate thoughts of suicide or need for support.




KEYS 

**BEHAVIORS** **EMERGENCIES**

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**RISK FACTORS & WARNING SIGNS**

**SITUATIONS**  
 Life circumstances that may lead to thoughts of suicide or need for support.

KEYS 

**EMERGENCIES**

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**RISK FACTORS & WARNING SIGNS**

**DIRECT VERBAL** **SITUATIONS**







**INDIRECT VERBAL** **BEHAVIORS** **EMERGENCIES**

KEYS 

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## RISK FACTORS & WARNING SIGNS

Unemployment is the likely result of a current situation, e.g., downsizing, (bar) complaints, loss of license, criminal charges, etc.

"I just can't deal with anything right now. I'm exhausted all the time and not sleeping well... I don't want to be here."

**CHANGES IN:** quality of work, ability to meet deadlines, response time to communication, ability to manage appointments, and/or level of effective collaboration with others.

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## RISK FACTORS & WARNING SIGNS

1. Indirect Verbal: Indirectly or indirectly  
*(e.g., "I'm not sure I can do this, maybe I'll try...")*

4. Direct Verbal: Directly  
*(e.g., "I can't do this, I'm not doing it.")*

3. Behaviors: Behaviors  
*(e.g., "I'm not sleeping, I'm not eating.")*

2. Situations: Situations  
*(e.g., "I'm not working, I'm not going to work.")*

**INDIRECT VERBAL**



**DIRECT VERBAL**



**BEHAVIORS**



**SITUATIONS**



**KEYS**  **EMERGENCIES** 

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## RISK FACTORS & WARNING SIGNS



**KEYS** 

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**RISK FACTORS & WARNING SIGNS**

FEARFUL  SENSE OF DREAD 

ANGRY  EMBARRASSED

BEING A BURDEN SHAMEFUL WORRIED

HUMILIATED STUCK REGRETFUL

VUNERABLE HOPELESS  DESPAIRING

STRESSED

KEYS

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**RISK FACTORS & WARNING SIGNS**

FEARFUL LONELY SENSE OF DREAD DISCONNECTED

ANGRY OVERWHELMED EMBARRASSED SAD

BEING A BURDEN SHAMEFUL WORRIED REGRETFUL

HUMILIATED STUCK DESPAIRING

VUNERABLE HOPELESS ANXIOUS

STRESSED

KEYS

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**SUICIDE PREVENTION FRAMEWORK**

RECOGNIZE CONNECT SUPPORT

KEYS

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## MEANINGFUL CONNECTIONS

<b>RECOGNIZE</b>	<b>CONNECT</b>	<b>SUPPORT</b>
Verbal Cues Behaviors Situations Emergencies <div style="text-align: right; margin-top: 10px;"> </div>		

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## MEANINGFUL CONNECTIONS & EMPATHY

Connections based on the shared human experiences of struggle and strength.

<b>RECOGNIZE</b>	<b>CONNECT</b>	<b>SUPPORT</b>
Verbal Cues Behaviors Situations Emergencies <div style="text-align: right; margin-top: 10px;"> </div>		

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## ASKING ABOUT SUICIDE

**A: ASK DIRECTLY**

**B: BE CLEAR**

**C: CALMLY REASSURE**

**CONNECT**  
 Listen to understand  
 Calm, judgement-free  
 Ask kind questions  
 Shared humanity

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## **ASKING ABOUT SUICIDE**

This is the first step in fostering hope – don't delay.

Share why you are concerned by connecting through the warning signs and risk factors.

Clearly, calmly, directly ask.

Reassurance about their sharing is key to moving forward.

Avoid ending the conversation before offering support.



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## **RISK FACTORS & WARNING SIGNS**

**Unemployment is the likely result of a current situation, e.g., downsizing, (bar) complaints, loss of license, criminal charges, etc.**

**"I just can't deal with anything right now. I'm exhausted all the time and not sleeping well... I don't want to be here."**

**CHANGES IN: quality of work, ability to meet deadlines, response time to communication, ability to manage appointments, and/or level of effective collaboration with others.**

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## **ASKING DIRECTLY ABOUT SUICIDE**

*"Sometimes, when people are really struggling, they have thoughts of suicide. So I feel it's important to ask: Have you been thinking about killing yourself?"*



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## **TALKING OPENLY ABOUT MENTAL HEALTH**

*"We all have times where we struggle and feel overwhelmed; sometimes, people may also have thoughts of suicide. Mental health support can make a big difference, so I feel it's important to make sure you know about the 24/7 Lifeline, which is available by calling or texting 988. You can reach out for yourself or if you are concerned about someone else."*



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## **SUPPORT & RESOURCES**

**RECOGNIZE**

**CONNECT**

**SUPPORT**



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## **SUPPORT, RESOURCES, & EMPATHY**

Connections based on the shared human experiences of struggle and strength.

**RECOGNIZE**

**CONNECT**

**SUPPORT**

Verbal Cues  
Behaviors  
Situations  
Emergencies

Listen to understand  
Calm, judgement-free  
Ask kind questions  
Shared humanity



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**SUPPORT, RESOURCES, & EMPATHY**

Connections based on the shared human experiences of struggle and strength.

<b>RECOGNIZE</b>	<b>CONNECT</b>	<b>SUPPORT</b>
Verbal Cues	Listen to understand	Bridge not destination
Behaviors	Calm, judgement-free	Affirm any help-seeking
Situations	Ask kind questions	Immediate is best
Emergencies	Shared humanity	Strength in connection




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**MYTH & FACT**

**MYTH:** Talk therapy and medications don't work.

**FACT:** Treatment can and does work.

*Finding the best treatment can take some time.  
The right treatment can greatly reduce the risk of suicide.*

The Mayo Clinic Health System: Common myths about suicide.





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**PUTTING IT ALL TOGETHER**

<p><b>ENGAGE &amp; CONNECT</b></p> <p>Shared humanity connects Calm, judgement-free Listen to understand Ask kind questions</p>	<p><b>OFFER SUPPORT &amp; HOPE</b></p> <p>Strength in connection Bridge not destination Affirm help-seeking Immediate is best</p>
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**HOPE: MORE THAN A FEELING**

- H**earfelt Goal
- O**ptions
- P**lan Support
- E**ngage




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**HOPE STARTS WITH YOU!**

Simple Ways to Reduce Stress

- Challenge Refocus
- Square Breathing
- Grounding Exercises







**BREATHWRK APP**  
Create nearly instant changes in your body and mind with the power of breathing.

**BREATHWRK** guides you through quick and powerful breathing exercises that eliminate stress & anxiety, increase energy, improve endurance, and help you fall asleep.

Learn and practice a variety of science-backed breathing methods that are guided by original music, vibrations, and visuals.



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**~~THE END~~ BEGINNING!**

- Myths & Facts
- Resilience/Self-Care Tips
- Identifying Risk Factors / Warning Signs
- Recommended Verbiage
- Empathy and Meaningful Connections
- Asking About Suicide
- Offering Hope and Support
- Staying Engaged




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**VII.**

**Helping Lawyers  
Manage Stress Through  
Creative Expression  
and Engagement**

**Katie Arata**

**Kyshona Armstrong**

**Kelly Corcoran**

**Anna McChesney**



# How Music and Creative Expression Can Support Lawyer Well-Being

Katie Arata

Senior Director of Development and Philanthropy

Virginia Law Foundation

Panel Participant as Moderator

“An extraordinary opportunity is at hand—by fully integrating the arts into health-building activities that are accessible to all, we can foster individual health and wellbeing, strengthen our communities, and fulfill a human birthright.”

To put it simply, lawyers are essential to the health of our society and its vast and varied communities and peoples, which requires that the health and well-being of lawyers be both preserved and made a priority. However, and as detailed in the Virginia State Bar President’s Special Committee on Lawyer Well-Being’s report, “The Occupational Risks of the Practice of Law,” there are myriad risks that challenge the health and well-being of lawyers, which include physical, mental, emotional, adaptation, and self-actualization risks. Each category of risk hosts an array of health liabilities specific to lawyers, and they affect not only the individual (lawyer), but their family, friends, colleagues, and community at-large. Considering the range of challenges and the scope of impact, it’s critical that the pathway to well-being be personalized and intentional. This provides an opportunity to consider alternative, evidence-based practices that can intervene, redirect, and mend the issues that lawyers face, and this is where music and creative expression can make a significant (proven) difference.

The Wellness Institute, and this panel specifically, centers around the idea that music possesses the power to heal. The NeuroArts Blueprint, a partnership between the Johns Hopkins International Arts + Mind Lab Center for Applied Neuroaesthetics and the Aspen Institute’s Health, Medicine & Society Program, acknowledges this extraordinary opportunity to integrate music and the arts into the more standardized health-building practices. In other words, music can work in tandem with traditional practices to improve mental health, prevent disease, manage stress, and create clearer pathways to well-being.

If music seems too alternative of a healing practice, or perhaps a stretch of a therapy to employ with those who are lawyers, let’s examine the word, “heal.” Defined by Webster, “to heal” means “to make sound or whole,” and stems from the root, ‘haelan,’ which is the condition of being ‘hal,’ or ‘whole.’ Even in the linguistic roots of the issue at hand, there is signaling to music.

And if that feels still too distant of a connection, consider the definition of music. Without consulting a dictionary, how would you define music? It’s not an easy concept to articulate succinctly; it’s a “know it

when you hear it” sort of experience, or perhaps a spectrum of possibilities. Music is often associated with song, yet it would be most beneficial to define it as expression (communication) through sound, rhythm, energy, and often language. To refer again to one of the core findings of the NeuroArts Blueprint report, music is a “birthright,” which means that music is for everyone, lawyers (you) included.

Music is not only elemental to our language, but it is fundamental to the person regardless of any musical background or lack thereof. After all, music is often referred to as the “universal language,” one that we all simply understand by sharing in the experience of being human. Not only does this make music more accessible and relatable, but it makes music an inherent part of who we are. If we allow music to be such a foundational part of the human experience, it should come as no surprise that music can have a profound impact on us.

This intangible concept of music has roots in evidence and science. Neurologically speaking, music activates almost all brain regions and networks, which ultimately promotes well-being, enhances learning, stimulates cognitive function, improves quality of life, and even induces happiness. Here is a sampling of how music (and music therapy) can impact the health and well-being of individuals:

- Music therapy decreases pain perception, reduces the amount of pain medication needed, helps relieve depression, and gives people a sense of better control over their pain.
- Listening to music that is at a slower tempo can decrease stress and anxiety, including their physiological responses.
- For those who have experienced a stroke or a traumatic brain injury that has damaged the left-brain region, which is responsible for speech, singing can be a powerful remapping tool. Because singing ability originates in the right side of the brain, people can work around the injury to the left side of their brain by first singing their thoughts and then gradually forgoing the melody.
- Listening to music from specific points in time can help Alzheimer's and dementia patients recall memories and communicate more effectively.
- In a study at the Tallahassee Memorial Regional Medical Center, 52 premature babies with low birth weight were played an hour of vocal music each day. These babies had a reduced hospital stay by an average of five days. Compared to another group that had not been played music, the mean weight loss of babies was also about 50% lower, formula intake was less, and stress levels were reduced.

If music can restore voice to the voiceless and recall memories previously buried in the depths of disease, how can we deny that it can be a transformative force in our daily lives? I find that one of the most exhilarating parts of using music as a healing tool or therapy is that, unlike medicine or traditional therapies where the exact method is prescribed, creativity is essential. It is not the prescription of specific music to listen to or certain kind of sound to make, but it's your music—your sound, rhythm, energy—to choose and create. This is about ultimate personalization, radical intention to find what works for you, and an

unleashing of creativity that heals the mind, body, and soul.

Creativity is often seen as a conduit to production or development of an ‘artistic product,’ but like music, creativity is both an inherent quality and a practice, whether conscious or subconscious. Using creativity is not a therapeutic practice with the end goal of generating an artistic product, but rather, an opportunity to be more attuned to the voice, thoughts, and feelings within you. Robert E. Franken describes the three reasons why people are motivated to be creative as a:

1. Need for novel, varied, and complex stimulation
2. Need to communicate ideas and values
3. Need to solve problems

These three points are already part of the lawyer’s day-to-day life in self-evident ways, and they also take shape in the trivial and the profound. Whether you took an inventive route home to circumvent traffic, or you presented an argument in a refreshed way that delivered a positive outcome for your client, creativity was a catalyst. Maybe you have called this catalyst something else, or perhaps you’ve never named it, but I invite you to give it this title and to recognize it as a tool that is both within your possession already and an existential affirmation of your humanity.

Lawyers are direct contributors to our communal health by upholding the Rule of Law, advocating for individuals, and creating access to justice, all of which ultimately create just, whole, and sound communities. This immense contribution of time, talent, and dedication takes a toll on the person and simultaneously becomes an integral part of one’s identity. It is of utmost importance that the lawyer is supported as an individual first, but it is worth considering: can this career that requires such significant devotion and discipline be severed from the persona of the individual? And while this is discussing the impact potential of music on the individual, can music also support the individual in their career? The answer is a resounding ‘yes.’

While the panel will elaborate and provide specific ways to incorporate music into your life, whether through somatic exercises, visualizations, music making (or listening), or journaling, there are manageable, playful, rest-giving ways music can impact you throughout the day and no matter the setting. Maybe it’s an hourly five-minute reset to listen to a calming piece of music without any other distractions, or it’s a guided visualization with music that starts your day with intention. Exploring music as a therapeutic intervention is not about employing tools that you use when you get home from a long, stressful day of work. This is about how to make what is already an inherent part of you (music) an inherent part of your daily life (and yes, work).

This discusses but a small fragment of perspective on this widely accepted, scientific, and deeply human practice of music and its therapeutic applications. And hopefully, it’s an awakening of the senses: what would it look like to find harmony with life and career? How can I feel more myself, more at peace, and more fulfilled? What does a sound mind mean? These are big questions to answer, and if they are challenging questions to answer, try to give sound, rhythm, or energy to them instead. This is an opportunity for your creativity, which has already been part of your life and career, to guide you.

# Music and Health: The Power of Music to Impact Stress and Our Emotions

Kelly Corcoran, MPH, MM  
Social Scientist, Vanderbilt Music Cognition Lab  
Orchestral Conductor  
Artistic Director and Conductor, Intersection

## Professional Destiny

- Creativity is essential in the way we develop our careers.
- Integrating our passions in unexpected and non-traditional methods helps us do our best, authentic work and serve our community in the most effective manner.
- As discussed in the risks identified by the Virginia State Bar, Lawyers in particular may become trapped in an area of law that is “unfulfilling” and “detrimental” which in turn is a risk to mental health and well-being. By casting a curious, explorative, creative, open perspective on one’s career, unexpected professional opportunities may arise.

## How Music Impacts our Health (physical, mental and social well-being)

“Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity.”

– World Health Organization

As a music professional that has worked for over 20 years in the arts and culture sector, I have first-hand witnessed the transformative nature of the arts, and specifically music. Whether it is the member of the community orchestra who has had the strength to make it through cancer treatment due to her looking forward to weekly music-making, or the youth at the Juvenile Justice Center in Nashville who have expressed their emotions and experiences, engaging in restorative justice, through lyric and song writing, music heals. While these are individual anecdotes, on a population level, arts and culture experiences are essential to what it means to be human and to thrive. By cultivating artistic practices, we all have the opportunity to reach our full potential of health, making music an essential aspect of our work towards health equity.

– Kelly Corcoran

# Musicality and The Role of Music in Our Lives

## **Musicality**

How we interact and engage with music, from our genes to our brain to our behavior

## **We are all musical!**

Musicality plays a role in all of our lives – whether we are performing, listening, practicing, or creating.

## A Sampling of Specific Examples of How Music Impacts Health

### **Physical Well-Being**

Singing has been found to be an effective intervention for Parkinson's Disease, as it has demonstrated a positive impact on several symptoms of PD ranging from speech, communication, quality of life, swallowing to gait. (Harrison et al., 2018) (Young-Mason, 2012)

### **Mental Well-Being**

“Music engagement may provide an outlet for individuals who are experiencing internalizing, externalizing, or thought disorder problems, potentially supporting emotion regulation through multiple neurobiological pathways (e.g., reward center activity).” (Gustavson et al., 2021)

### **Social Well-Being**

Music activities such as attending concerts, group singing, songwriting and composition positively impact cognitive health, social connection and mood, self-esteem and cultural inclusion. (Dingle et al., 2021)

## Music and Emotional Regulation

### **Emotional Regulation**

How individuals manage, control and influence one's own emotional state

Engaging in music in daily life has been shown to be an effective tool to manage stress. Music may provide escapism, active-coping, self-distraction, acceptance and positive reframing all supporting the two primary methods of coping: problem-focused coping and emotion-focused coping. (Henry et al., 2021)



## Why Does This Matter for Lawyers?

Reports on lawyer well-being outline the risks of the profession including mental and emotional risks such as the adversarial nature of the work, the proximity to trauma and the problems of others, and the individual aspect which can lead to loneliness and isolation. Outside of the law profession, the US Surgeon General recently raised the alarm on the epidemic of loneliness and isolation facing all Americans, with 58% of US adults experiencing loneliness. This is particularly troubling as social connection is known to be a protective factor for a range of health conditions including cardiovascular disease, dementia, anxiety and depression. Evidence demonstrates that the arts have an impact on both physical and mental health across the lifespan, being a powerful tool to build social connection. (Fancourt et al., 2019) Engaging in arts activities has shown a clear dose-response relationship improving social well-being and flourishing (a state of positive mental health). (Bone et al., 2023)

Music, an essential part of our daily lives, provides an accessible, inexpensive opportunity to respond positively to the stress in our lives, with no known adverse effects. By utilizing the potential benefits of music on health, lawyers will be better equipped to respond to the demands of the profession, respond to burnout and better serve communities and clients.

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# Connecting to Inner Wisdom Through Creativity

Anna McChesney, LPC, MT-BC  
Owner, Licensed Counselor, and Music Therapist  
Healing Sounds, LLC

In the legal profession there are many mental and emotional risks that come with the job. Professional demands of prolonged exposure to hearing about trauma and hardships from clients can lead to depression, chronic stress, isolation, and job dissatisfaction. Vicarious trauma can lead to exhaustion and physical symptoms of anxiety. **Recognizing the risk, developing inner resources, and seeking help** is necessary to be the best version of yourself in your professional and personal life.

You may believe that to live in such a way that you can trust your inner wisdom to provide loving consistency is not accessible to you, but it is. Right now, a quick internet search will provide countless articles and blogs on how to create goals about loving yourself. Search this on Amazon and you can find pages of books on how to find inner peace. Many people, experts and not, have shared their experiences through podcasts and Ted Talks. But, most people agree that reading or listening about inner peace is not the same as implementing it into your daily life. **Through connecting to creativity, it is possible and readily accessed.**

**It is easy to think that if you change something external about yourself, that you will be happier, more successful or fulfilled; however, most people will still be left wanting a deeper connection to self.** To begin your journey towards transformation, the first step is to access your inner guidance. You have to be willing to be open to a different way of thinking. This creative way of exploring the inner world starts looking inward and listening within while tuning the outside noise out. A possible introduction to connecting to inner wisdom through creativity follows.

To begin this process into creative engagement, you must first ground yourself. Grounding through mindfulness, meditation, deep breathing, or slow movements will quiet your mind leaving a blank canvas for your action steps to manifest. Mindfulness also means not passing judgment on yourself while also being open and observant to any and all thoughts and feelings that come up. Grounding can be paired with music listening, sand tray or doodling to further quiet the mind. After quieting your mind and slowing the body down, allow yourself to be open to any words of wisdom from yourself. Allow any words, sensations, or feelings to enter your mind. Then, take a deep breath and use a creative outlet alongside your intuition to bring it outside of yourself.

The most important part during mindfulness-based creativity is to remain open and non-judgmental. Many people worry that they are not creative or talented enough to make art. The good news is that the effects of making music and art is not limited to a person's skills or talents, the outcomes of creative thinking, boosting self-esteem and relieving stress is available to anyone willing to try! There are many ways to incorporate creating art or music into this practice.

Your creative expression may look like putting it on paper through journaling or songwriting or drawing or painting. It may look like creating tangible art with your hands. It may mean moving your body in creative ways. It may look like improvising on an instrument or singing karaoke style to your favorite song. Whatever creative means you choose, allow yourself to be fully engaged in the process until you feel like you are done.

When you are done, take a moment to re-ground yourself through breath. Then, with curiosity, reflect on your words, creation, thoughts, and feelings that came up during the process. Sometimes it can be helpful to share this with a friend or impartial person like a therapist that can further assist you in connecting creativity to inner wisdom in a non-judgmental way.

**Adding creative expression to your daily ritual may be beneficial to reducing, reflecting and processing symptoms so that you can improve your wellbeing, leading you to be the best version of your professional self and your personal self.** Even setting aside 10 minutes several times per week to connect to inner wisdom can be enough to get you on the right path towards living a more fulfilling life.

## Resources

Sign up for a free self care guided meditation video series to try this technique for yourself:  
<https://www.healingsoundsrva.com/self-care-guided-meditations>

Read more about how engaging in the creative arts relieves stress: <https://bebrainfit.com/benefits-art/>

***Health Risks to Lawyers***, a study on mental and emotional risks and its effects of the law profession, and pointers to improve wellbeing.



# VIII.

## **Helping Lawyers Find Wellness from Within: Healing Power of Songwriting Workshop**

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# Helping Lawyers Find Wellness from Within: Healing Power of Music Songwriting Workshop

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“Engaging with creative and artistic activities has a proven track record of improving individual and population health—from increased emotional regulation and social connections and improvements in cognitive capabilities and meaning-making to alleviating pain, reducing anxiety, and facilitating healing processes.”

— Human Capital and the Arts at the World Bank Group

“With creativity as a catalyst and music as a birthright, it is both scientifically proven that such activities can improve well-being, and it is undeniably true that we each have a story to tell, a song to share, and a voice inside with not just something to say, but something to heed. As previously discussed, “to heal” means “to make sound,” and in order to make sound, we have to quiet the noises around us. However, the world is a very loud place to live, and as lawyers, your career often amplifies the noise. You listen to clients who have lived their worst day. You manage the stressful demands of your caseload. You always have your phone on you because what if someone needs you, or what if they call you back? You absorb the conversations of your colleagues and peers. You process, whether willingly or not, the bombardment of messages, advertisements, and cultural rhetoric. How do you tune it out so you can hear yourself think? You find ways to tune in(wards) to listen, and chances are, there are all the parts of your song.

Again, you might call it by a different name or no name at all, but for the sake of this session, let’s call it a song. In fact, you have already written songs, or you have, at the very least, participated in the fundamentals of songwriting. Maybe you made up a song for your child when they were younger (you certainly made up a song as a child!), or you replaced the words to a popular song to have a little fun. Maybe you hum when you’re in the car, or you unintentionally rhyme in an email. As a lawyer, you make use of tone and language, and you articulate to express with utmost clarity and confidence (and you write quite a bit). You share your ideas and thoughts in ways that make other people hear you. This is creative expression in practice. This is songwriting in real life.

Similar to law, which demands that you both acquire knowledge and then actively apply it, wellness, or the journey to well-being, requires you to process information, ask questions, and apply the information and practices so to improve and enhance your life and well-being. Wellness requires conscious participation, and while this Institute covers a variety of topics that propose alternative yet proven ways to support your well-being journey, this songwriting workshop is an inviting, exploratory, and a trusting space to apply this information and participate in your own, inherently creative ways.

It's important to preface this workshop by saying that the goals of it are entirely nonmusical. Therapeutic songwriting, which has spiked the interests of clinicians over the past several decades due to its positive impact, allows the individual to examine their experiences and emotions and tell their story. This narrative process then puts words to those experiences and emotions, and in doing so, allows the person to process the meaning and ramifications of the stories and their feelings. With the support of music, which has already been discussed as a proven healing agent, this articulated story joins with sound to create a song, and songwriting becomes a healing process and a transformative experience.

Before discussing further, it might prove beneficial to briefly introduce a few projects that are using songwriting as a therapeutic practice to contextualize its impact:

**SongwritingWith:Soldiers:** This organization pairs professional songwriters with service members to craft songs about their experiences, often about combat and the return home. This unique collaboration offers participants a way to tell their stories, rebuild trust, release pain, and forge new bonds, and through this process and their songs, participants rediscover their creativity and reconnect with family, friends, and communities.

**Lullaby Project:** A project of Carnegie Hall's Weill Music Institute, the Lullaby Project pairs new and expecting parents and caregivers with professional artists to write and sing personal lullabies for their babies, supporting maternal health, aiding childhood development, and strengthening the bond between parent and child.

**ProMiMiC:** This organization empowers groups of musicians playing person-centered improvisations for patients and nurses in hospital settings. Research has demonstrated that this person-centered music making can be put into practice effectively in a medical setting and that it provides meaning for all participants as well as reducing experiences of pain in patients.

Songwriting in a therapeutic way is an active intervention and a participatory engagement in your own well-being. Not only is songwriting restorative, but due to the process of songwriting, which takes time, it allows for sincere and even prolonged engagement with issues, experiences, and feelings, which enables the songwriter (that's you!) to sit with emotions and explore alternative paths to recovery.<sup>1</sup> While the definition of a song is as expansive and varied as the definition of music, a song generally has an arc, and by giving it this shape, the issue at hand is given a structure, which gives the songwriter a comfortable space to confront their experiences. In addition, songwriting draws on executive functions, such as organizing, self-monitoring, and problem solving, and it inspires the songwriter to be present with an issue or emotion and stay focused on addressing it.



While songwriting might be an exercise in processing and accepting, songs can reveal unexpressed thoughts and feelings that are very much part of your present-day experience. As mentioned, the act of creative expression is an inherent ability, which means that creative expressions will come naturally and subconsciously. As a lawyer, you are constantly intaking other people's experiences and emotions, and as your capacity fills, it is likely that your own needs, thoughts, and feelings become lost. Because this therapeutic method can create consciousness, songwriting can draw out emotions that need accepting, processing, and releasing. In addition to giving language to your own experiences, songwriting marries words with music to deepen their meaning. With the help of a music therapist or guide, or even on your own, you can shape sound to imitate the lyrics to deepen their meaning and fulfill your expression.

In the previous section, it was articulated that that the outcome of creativity is not artistic product but self-expression, and songwriting, whether you see it as a creative outlet, a brain exercise, or an impactful therapeutic method, is a vehicle to this outcome. Not only can songwriting be an opportunity for self-reflection, expression, and healing, but it can also be an opportunity to engage in social activity and collaboration. While this workshop aims to inspire a personal practice to be applied in life outside of the workshop, this specific program presents another health-giving experience to engage with others through teamwork, trust, and connection.

Songwriting in a group setting provides the chance to apply and strengthen social qualities that are essential in the careers of lawyers. By endeavoring to write a song together, you decipher your role in the group and how it fits with the roles of others, determine how to share your ideas effectively, and take responsibility within the setting of others. While vulnerable, it also provides a space to practice expressing your thoughts and feelings with others, how to be more trusting, and how to receive the information of others in a healthier, respectful way.

Therapeutic songwriting also provides a tangible reference point. Though other, more traditional practices provide experiential opportunities, this method allows the songwriter to emerge from the experience with something to have and revisit. While the process is the critical part of this method, the song also serves as an encapsulation of the songwriter's thoughts and experiences at a specific point in time. This also means that it can be revisited and reexamined in new ways, played or performed by the songwriter as an expressive or soothing activity, and built upon as desired.

Songwriting is yet another way to exercise the inherent creative expression that every person possesses, and it is an invitation to give shape to your feelings, thoughts, and experiences in new, affirming, and even uplifting ways. It is a chance to take what you know and apply that knowledge as you journey your course and move through your life and career. Most importantly, it is a chance to heal in your own ways, in your own terms, in your own words, and through your own song.

## Songwriting: One Lawyer's Story

### When The Whole Truth and Nothing but The Truth Meets Three Chords and The Truth

I graduated from law school at 25 and was doing felony trial work as a prosecutor before I was 27. Murder, sexual assault, child abuse. It was all consuming. High stakes; high stress. All my friends were lawyers. All we talked about was the cases we had. The law was not the biggest part of my life – it became my entire life.

I eventually entered private practice and my days were filled with even more stress since I was starting all over again learning civil practice. And now I had clients. Difficult clients. Demanding clients. I cared about them. Some said I cared too much.

I would take long drives to try to clear my head. Talk radio – my go to up to that point - became noise. Clutter. I needed a different kind of sound. So, I turned to the music stations. Rock too was too cluttered, and I wasn't ready for those classical stations at the beginning of the dial – but somewhere in the middle country music fit just right. It was the cure for a disease I didn't realize I had but which was growing just the same.

Now I had no musical skill, and other than briefs and motion papers, I had never written so much as a postcard. But at some point as I drove the often-snowy backroads of upstate New York, something inside was driving me from music fan to active participant.

Music and motion were giving me a little bit of balance – before I even knew what balance was. In those days we just did. Twelve-hour workdays were not questioned. Balance was for circus performers doing the high wire act. Little did I understand that law practice is a high wire act all its own.

My life as a music participant wasn't conscious. Not at first. But I remember one afternoon while mowing my modest lawn in the mind-numbing hot summer haze ideas for song titles, out of nowhere, started popping into my head. I forgot half of them by the time I was done but wrote down what I could remember.

Then, a few days later, I looked at what I had written down and was surprised I had written what I did. Some weren't half horrible. To this day I remember my first – Let Lying Dogs Sleep – about a divorce client who left her husband before dawn. Soon I started to make a conscious effort to write. In these days well before the Internet I had to go to my local bookstore and get a book on songwriting, songwriter magazines, and a rhyming dictionary. This was getting to be fun at a time where I had forgotten what fun felt like.

Instead of waking up and immediately thinking about work I read about songwriting. It wasn't long before I realized if I wanted to write how the people in Nashville did I had to learn structure. But the

structure was good for me. It was not only like solving a puzzle – it was like creating the puzzle and then solving it. It was training my mind to do something other than think like a lawyer. I felt like my heart and soul were returning to their rightful places.

Drawing from things I'd heard in court from real people with real problems, I became very intentional about writing. Lyrics regularly started popping into my head. So did very basic melodies. Words first, then music. That's how it was for me.

I also became dangerous on the roads. I was a headline in the making. I'd drive and scribble the epiphany of the moment on the back of a Dunkin Donuts receipt (or sometimes on the front which became a real challenge to read) and just put it in a shoebox filled with scraps of words until I could figure out what to do with them, that is if I didn't wrap myself around a telephone pole first.

I had no intention to ever write for any reason other than the love of it, and the challenge. I was of course not thinking I could do it for a living – I knew enough to know there were so many great writers and most would never earn a dime from it. I had a job that paid the bills – my problem was I had no life.

Eventually I took a job in Indiana and was able to commute to Nashville. I went to the Bluebird Cafe and less well-known songwriter spots. I was so impressed by many writers/performers I'd seen. And one day I met up with a wonderful friend who ironically left law school in Oklahoma at the urging of none other than Garth Brooks and traveled to Nashville to be a songwriter and recording artist.

I learned so much from him. He was a pro. And he had a record deal. At least until the label went bankrupt. We wrote a bunch of songs together. Some were pretty good; some were downright awful. But it didn't matter. The journey was more important than the destination.

After he recorded one of our songs – that was like crossing the Rubicon for me. Or maybe more like solving Rubick's Cube. I felt I had done something real. Something I enjoyed. It was a better feeling to me than anything I had done in the law. I helped create something that never existed before then. And even if no one else ever listened to it, I could. In our work as lawyers, we don't get to create much other than paperwork – often seasoned with a lot of pain and anguish for some, if not all, of the participants. This felt, I don't know, really positive.

At some point down the road, I added screenwriting to the mix. And eventually fiction. Just like runners who need to run, I found that thinking about ideas to write when alone in the car or just before bed or on a morning walk was something that made me healthier. More whole. More well.

So, to this day I write – I have no idea where the next idea will come from other than to know that a lot of them simply come from my day-to-day conversations, stories I read in the paper - or a magazine - or online - or just asking myself a lot of 'what if' questions. And I'm sharing this with the hope that as you look for your balance, that music and writing may just feel like the soft warm hug it has felt like for me.

I've never told anyone about this part of my journey prior to working on this Institute. It didn't seem like it would matter to anyone else. Now it seems like it does.

As I learned more about the needs we have as lawyers, I realized more and more that I'm just like most of you. I went to law school thinking it would be a fulfilling career where I could help people. I never thought I'd be stressed out all the time in the process. Most of us may not have gone if we'd had known then what we know now.

But with time and balance, and the comfort of those who have walked somewhat in each other's shoes, we can still love the law and have the law touch what we do in life. But there is something about drifting away into songs and stories that helps my brain from sounding like a big, fluffy, out-of-balance comforter in a washing machine.

I will leave it to the experts to tell you all why this thing they call music works for people like me. Hopefully for people like us. All I can tell you is that it does. I'm not sure where my life would have gone without not only writing and thinking of ideas - or without the people I met in this creative world. These people, as much as the writing, bring such a different perspective. They live in a space that values our humanity. We don't talk about law (unless it's a script for a lawyer show). We talk about words that rhyme. Or at least match.

It's this creative process and community that helped me get my life back at a time when my brain, my family, and even my dog were pleading. All I am saying is give peace a chance in three-part harmony. I did. It's worked.

## Setting the Stage: An Introduction to Writing Your Song

Music reflects mood, story, and can provide solace or respite. More often than not, many of us turn to music as a way to clear our minds, reset for the day and find encouragement. In this workshop we will explore our creative minds and place the musical message in your hands.

Throw out the stories that you have been told; that you have no voice for singing, that you're not a poet, or you're not musically inclined. The intention of this workshop is to help you discover that your words alone can inspire anthems and expressive melodies. Within this process, the mission is for you to find a creative community with your peers, give yourself permission to play, and write a song that you can call upon in your own times of need.

During this therapeutic songwriting workshop we will divide into small groups to write songs of encouragement, empowerment, and truth. Each group will have a professional songwriter as your guide. No musical experience is necessary, just the willingness to create, explore and contribute to the conversation. It is not our goal to write a hit song. This is more about the process and how we can improve our wellness through play and creative writing while we express our feelings, thoughts and needs as well as encourage positive communication between individuals as we work towards a common outcome: Your Song.

## Songwriting Workshop Overview

This songwriting workshop is intentionally presented on the third day of the Wellness Institute so to follow the more in-depth discussions regarding proven and creative approaches to pursuing well-being. As the singular activity of this day, it provides structure to and focus on the songwriting activity and a certain calmness to the schedule. To restate, the goals of this workshop are entirely nonmusical; rather, the goals are:

- To introduce a proven therapeutic method to support lawyer well-being
- To eliminate any barriers a participant might see to creative expression or participation and invite them into a trusting, creative experience
- To foster a collaborative, comfortable, and safe environment that allows each participant to express themselves as they wish
- To provide professional therapeutic guidance to all participants
- To cultivate interpersonal connections and communication skills
- To strengthen the core executive functions that lawyers employ in their careers
- To instill a curiosity about music, songwriting, and other creative practices with the goals of participants using alternative therapeutic methods and experiences in their daily lives and careers

The workshop will begin with an introduction by Kyshona, during which she will outline the general experience and process. Afterwards, attendees will be broken into three, pre-assigned small groups and paired with a resident teaching artist for an hour and 45-minute songwriting session. The format for each group will be the same, though the songwriting experience will vary based on each group's dynamic, discussions, and interpretations.

## Each breakout session will follow this format:

The teaching artist will further introduce themselves and invite participants (songwriters) to introduce themselves as well. The artist will also do some tone-setting to continue the conversation on how songwriting can be healing and ask for some initial responses to the larger topic of therapeutic songwriting.

- It will be stressed that this workshop is highly personal and should be a comfortable space to explore your own thoughts, emotions, and experiences in a productive, creative way. No songwriter will be ‘forced’ to share, but instead, every person will be invited to participate as they are comfortable with the goal that the collective group creates a safe and trusting environment for this kind of group work.

Songwriters will then be asked to spend a few minutes journaling to some provided prompts, which include:

- Think of and write down a few compelling phrases that you have heard during your legal career that stand out as something you could use in a song.
- Having gotten to this point in the Institute, what thoughts are coming to mind about your well-being?
- What is your personal mission?
- Write freely: what is on your mind right now?  
Journal without stopping, and see what finds its way to the page.
- What is a personal intention you want to maintain during this workshop?

Following this, the teaching artist will ask for some responses to be shared from the group and will begin to word map words, phrases, and ideas that arise.

The artist will facilitate discussion to get all songwriters to begin to identify common threads and shared ideas so to determine an initial direction for the song.

- As discussed previously, therapeutic songwriting is not only an opportunity for personal exploration and healing but also a time to engage with others, learn how to collaborate, connect, and trust. A major part of this exercise will be fostering a positive group dynamic that prioritizes humanity, respect, and understanding.

As more of a response to the conversation, the artist will guide songwriters to suggest other words, phrases, music ideas, and thoughts that could serve the song. It is important to stress that each teaching artist has done this process numerous times and will be fully engaged to assist all songwriters in drawing out their thoughts and personal creativity. They will also be a source of musical interpretation, and by listening to

the feedback from the songwriters' conversations, they will help give sonic shape to the song and ask the songwriters to help direct the music. The assimilation of the song will also vary based on the group, but it will most likely follow a verse-chorus format with more verses being added as time allows.

## After the breakout sessions

At the end of the breakout sessions, all participants will come back together for a performance and discussion. The teaching artists will perform the songs created by each small group and provide a discussion space for participants to talk about what the process was like, the surprises and the challenges of it, and ways to maintain this practice after the workshop. While the process is more important than the product, the chance to hear and receive music in a therapeutic way, especially in this personal story-sharing way, gives attendees an opportunity to learn from other points of view and reflect on shared ideas and connections.

This workshop enables both active and receptive therapeutic experiences: attendees are able to participate in music-making, which provides a unique activity that has its own health benefits, and receive and experience music, which is a significant part of the therapeutic experience. At a later point in time, these songs will be professionally recorded and distributed to each participant so that they can utilize them in their lives and careers.

“Where words fail, music speaks.”

– Hans Christian Anderson





**“Music is a moral law. It gives soul to the universe,  
wings to the mind, flight to the imagination and charm  
and gaiety to life and to everything.”**

– Plato



**“Music washes away from the soul  
the dust of everyday life.”**

– Berthold Auerbach



**“Music should be your escape.”**

– Missy Elliott



“Music is the best means  
we have of digesting time.”

– W. H. Auden





“Who hears music feels his solitude  
peopled at once.”

– Robert Browning



“For me, singing sad songs often has a way of healing a situation.  
It gets the hurt out in the open into the light, out of darkness.”

– Reba McIntire



**“Music can name the unnameable and  
communicate the unknowable.”**

– Leonard Bernstein



**“Music is probably the only real magic  
I have encountered in my life.”**

– Tom Petty





“I haven’t understood a bar of music in my life,  
but I have felt it.”

– Igor Stravinsky



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