



**South Carolina Bar**  
Continuing Legal Education Division

## **2026 SC BAR CONVENTION**

**Wellness Committee**

“A Business Case for Wellness”

**Friday, January 23**

*SC Supreme Court Commission on CLE Course No. 260141*

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# South Carolina Bar

Continuing Legal Education Division

## From Burnout to Balance Sheet: Building Financial and Personal Well-Being in Law

*Javoyne Hicks*



# **From Burnout to Balance Sheet: Building Financial and Personal Wellbeing in Law**

**Navigating Beliefs, Choices, and Tools for Success**

**R. Javoyne Hicks  
Center for Lawyer Wellbeing  
State Bar of Georgia**

# What Is Financial Wellness?

## More Than Just Money

Financial wellness means having control over day-to-day finances, capacity to absorb financial shocks, and freedom to make choices that let you enjoy life.

It's the foundation for reducing stress and achieving professional and personal goals.





# Why Financial Wellness Matters in Law

## Reduce Burnout

Financial stress compounds professional pressure, leading to exhaustion and poor decision-making.

## Improve Performance

Clear financial footing allows focus on client service and career growth.

## Sustain Practice

Sound finances ensure long-term viability and the ability to weather economic changes.



# The Importance of Financial Wellness in Wellness in Law Firms



## Reduced Stress

Financial stability decreases anxiety, allowing lawyers to focus on clients and case strategy without distraction.



## Enhanced Performance

When finances are under control, productivity increases and quality of work improves significantly.



## Retention & Culture

Firms that prioritize financial wellness attract and keep top talent, building stronger teams.



## Work-Life Harmony

Financial confidence enables healthier boundaries between professional demands and personal life.



# Foundational Beliefs and Their Impact

**Our beliefs about money shape our financial behaviors**

## Childhood Messages

Early experiences with money create lasting patterns — scarcity or abundance mindsets often start in youth.

## Professional Identity

Legal training emphasizes billable hours over financial planning, creating blind spots in money management.

## Cultural Narratives

Society's stories about success and wealth influence how lawyers view their own financial journey.

# Common Financial Beliefs in the Legal Profession

**"I'll make enough money to retire comfortably."**

High earning potential creates false security — without planning, even substantial income disappears.

**"I don't need a budget; I know where my money goes."**

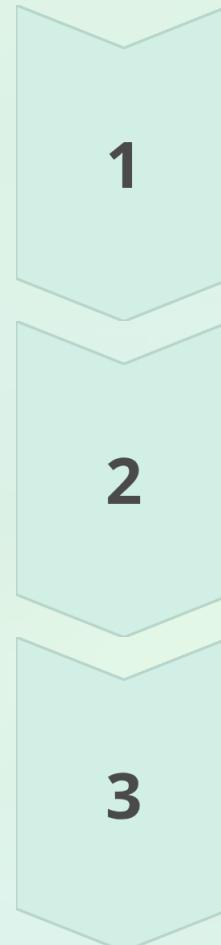
Assumptions about spending rarely match reality. Tracking reveals surprising patterns and opportunities.

**"Investing is too complicated for me."**

This belief keeps lawyers from building wealth. Basic investment knowledge is accessible and essential.



# How Beliefs Shape Financial Practices



Limiting beliefs lead to overspending, under-saving, and missed investment opportunities.

## Actions → Outcomes

Poor financial habits compound over time, creating stress and limiting options.

## Outcomes → Future Beliefs

Negative results reinforce limiting beliefs, creating a difficult cycle to break.

**The key:** Self-awareness helps you recognize and challenge beliefs holding you back.



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# From Mindset to Money

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## Scarcity Thinking

Shows up as fear, insecurity, hoarding, and inability to invest in growth.

Leads to reactive decisions and missed opportunities.

## Abundance Thinking

Reframes money as a tool for creating choices and building freedom.

Enables strategic planning and confident action.



# Positive and Negative Belief Impacts

## Impacts

### Negative Impact

- Chronic stress and burnout
- Impulse spending and lifestyle inflation
- Avoidance of financial planning
- Inadequate retirement savings
- Relationship strain over money

### Positive Impact

- Proactive financial planning
- Disciplined saving and investing
- Strategic career decisions
- Peace of mind and confidence
- Generosity and legacy building

# Making Healthy Financial Choices

Abundance thinking enables practical, strategic financial decisions.

01

## Assess current reality

Understand where you are financially — income, expenses, assets, liabilities.

02

## Define your vision

What does financial wellness look like for you and your practice?

03

## Create actionable strategies

Develop specific plans for budgeting, saving, investing, and managing debt.

04

## Monitor and adjust

Regular review ensures you stay on track and adapt to changing circumstances.



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# Budgeting and Financial Planning

## Planning

### Track Everything

$$\frac{f}{dx}$$

Three months of detailed expense tracking reveals true spending patterns and opportunities.

### Set Clear Goals



Define short-term (under 1 year), medium-term (1-5 years), and long-term (5+ years) objectives.

### Build Flexibility



Allow room for irregular expenses and lifestyle adjustments while staying on track.

# Investment in Technology and Tools

## Smart Tech = Time Saved

The right financial tools automate routine tasks, reduce errors, and provide real-time insights.

- Practice management software
- Time tracking and billing automation
- Expense categorization and reporting
- Cash flow forecasting
- Document management systems

**ROI:** Technology investment pays for itself through efficiency gains and better decision-making.



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# Debt Management Strategies

## Understand Your Debt

List all debts: student loans, credit cards, business loans, mortgages — with interest rates and terms.

## Prioritize Strategically

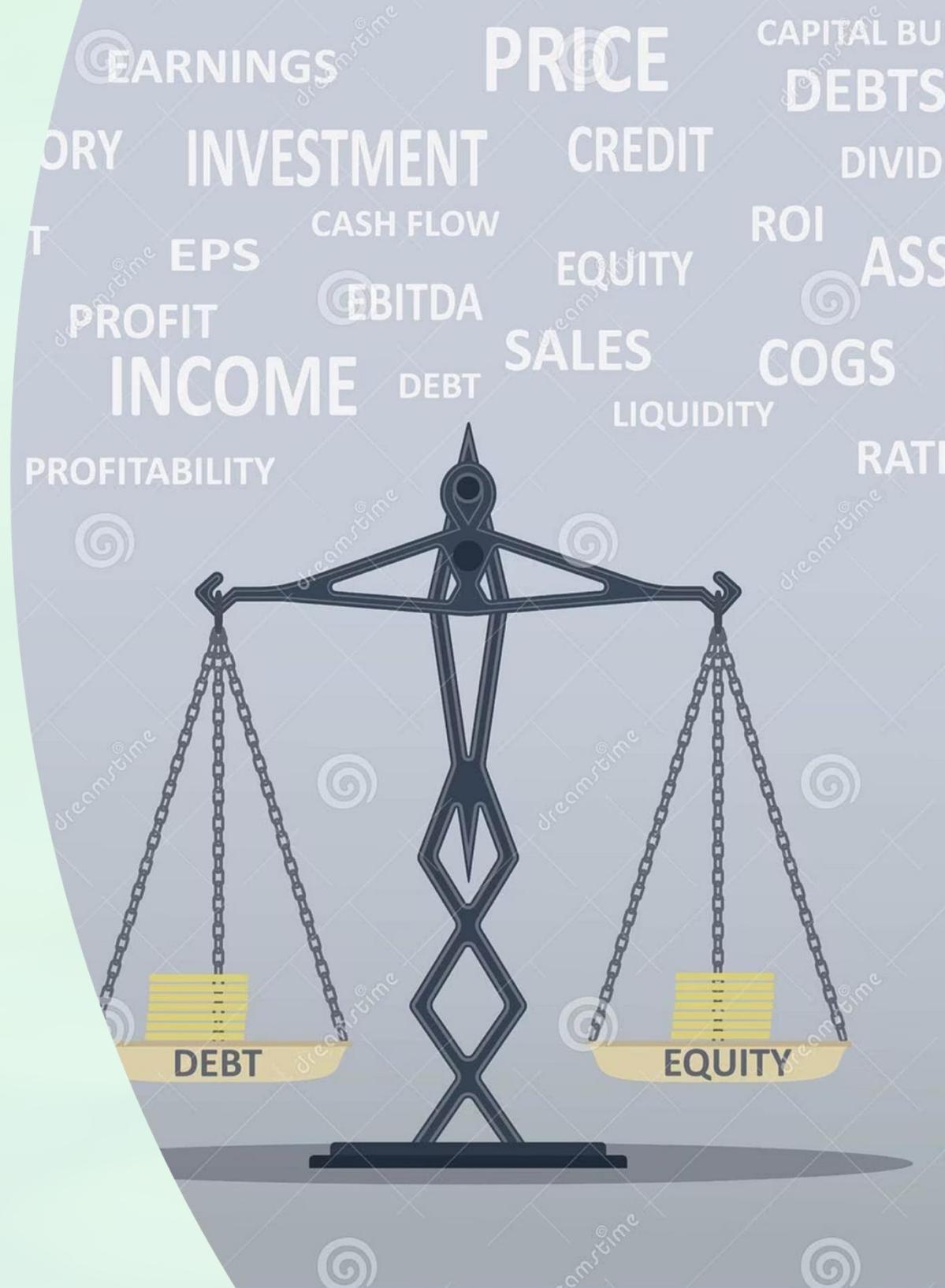
Consider both avalanche method (highest interest first) and snowball method (smallest balance first).

## Negotiate and Refinance

Explore options to lower interest rates or consolidate high-interest debt.

## Prevent New Debt

Build emergency savings and plan for large expenses to avoid new borrowing.



# Tools for Financial Improvement

The right tools transform financial management from overwhelming to manageable.

Let's explore practical solutions that work for legal professionals.





# Accounting Software Options

## QuickBooks

**Best for:** Comprehensive bookkeeping and tax preparation  
Strong integration with legal practice management systems and detailed financial reporting.

## Xero

**Best for:** Cloud-based collaboration and real-time access  
Excellent for firms with remote teams and strong automation features.

## Clio

**Best for:** All-in-one legal practice management  
Combines billing, accounting, document management, and client communication in one platform.

# Key Features to Look For

## Essential Capabilities

- Trust accounting compliance: IOLTA/IOLA management built-in
- Time tracking integration: Seamless billing from tracked time
- Expense categorization: Automatic classification and reporting
- Invoice automation: Recurring billing and payment reminders
- Financial dashboards: Real-time visibility into key metrics

## Advanced Features

- Multi-currency support: For international clients
- Custom reporting: Tailored financial insights
- API integrations: Connect with other business tools
- Mobile access: Manage finances on the go
- Audit trails: Complete transaction history

# Key Features to Look for in Accounting Software

## Software

1

### Automation

Bank feed integration, recurring invoices, automatic expense categorization to eliminate manual data entry.

2

### Reporting Capabilities

Profit and loss statements, cash flow projections, balance sheets, and customizable reports for insights.

3

### Integration

Seamless connection with banking, payroll, CRM, and practice management systems already in use.

4

### Mobile Access

Review finances, approve expenses, send invoices from anywhere on any device.



# More Key Features

- **Bank reconciliation tools**

Automatic matching of transactions with bank statements saves hours monthly.

- **Tax preparation support**

Organized records and categorized expenses simplify tax season dramatically.

- **Client portal access**

Allow clients to view invoices and make payments directly, improving cash flow.

- **Security and backups**

Bank-level encryption and automatic backups protect sensitive financial data.

# Tips for Effective Use

## **Set up properly from the start**

Invest time in initial configuration — chart of accounts, tax settings, integrations — to avoid problems later.

## **Reconcile regularly**

Weekly reconciliation catches errors quickly and keeps records accurate.

## **Review reports monthly**

Profit & loss, cash flow, and aging reports reveal trends and issues early.

## **Automate routine tasks**

Use recurring transactions, automatic payment reminders, and scheduled reports to reduce manual work.

## **Train your team**

Ensure everyone using the system understands best practices and proper procedures.

# Tips for effective use of financial management tools

## 1 Set Up Properly from Day One

Invest time in initial configuration: chart of accounts, bank connections, tax settings. Foundation determines future success.

## 2 Daily or Weekly Updates

Regular data entry prevents backlogs. Set recurring calendar reminders for reconciliation and categorization.

## 3 Leverage Automation

Use rules for recurring transactions, automatic invoice reminders, scheduled reports. Let technology handle repetitive tasks.

## 4 Review Reports Monthly

Schedule non-negotiable time to analyze financial statements. Identify trends, celebrate wins, address concerns early.

# Outsourcing vs. In-House Management

## Outsourcing Benefits

- Expert knowledge and experience
- Time freed for billable work
- Reduced payroll and training costs
- Access to specialized tools
- Scalability as practice grows

Best for: Small to mid-size firms focused on core legal work.

## In-House Benefits

- Direct control over finances
- Immediate access to information
- Customized processes and reporting
- Team understands practice specifics
- No external service fees

Best for: Larger firms with volume to justify dedicated staff.

*Hybrid approach:* Many firms outsource tax preparation and strategic planning while handling day-to-day bookkeeping internally.



# Managing Finances In-House

## Designate a financial lead

One person oversees financial processes, even if multiple people handle transactions.

## Create written procedures

Document processes for billing, collections, expense approval, and reconciliation.

## Implement separation of duties

Different people handle deposits, disbursements, and reconciliation to prevent errors and fraud.

## Schedule regular reviews

Weekly cash flow checks, monthly full reviews, quarterly strategic planning.

# Financial Education and Mentorship



## Continuous Learning

Financial literacy isn't taught in law school — commit to ongoing education through books, courses, and workshops.



## Find Mentors

Connect with attorneys who've achieved financial wellness and learn from their experiences.



## Join Communities

Participate in financial wellness groups within bar associations and professional organizations.

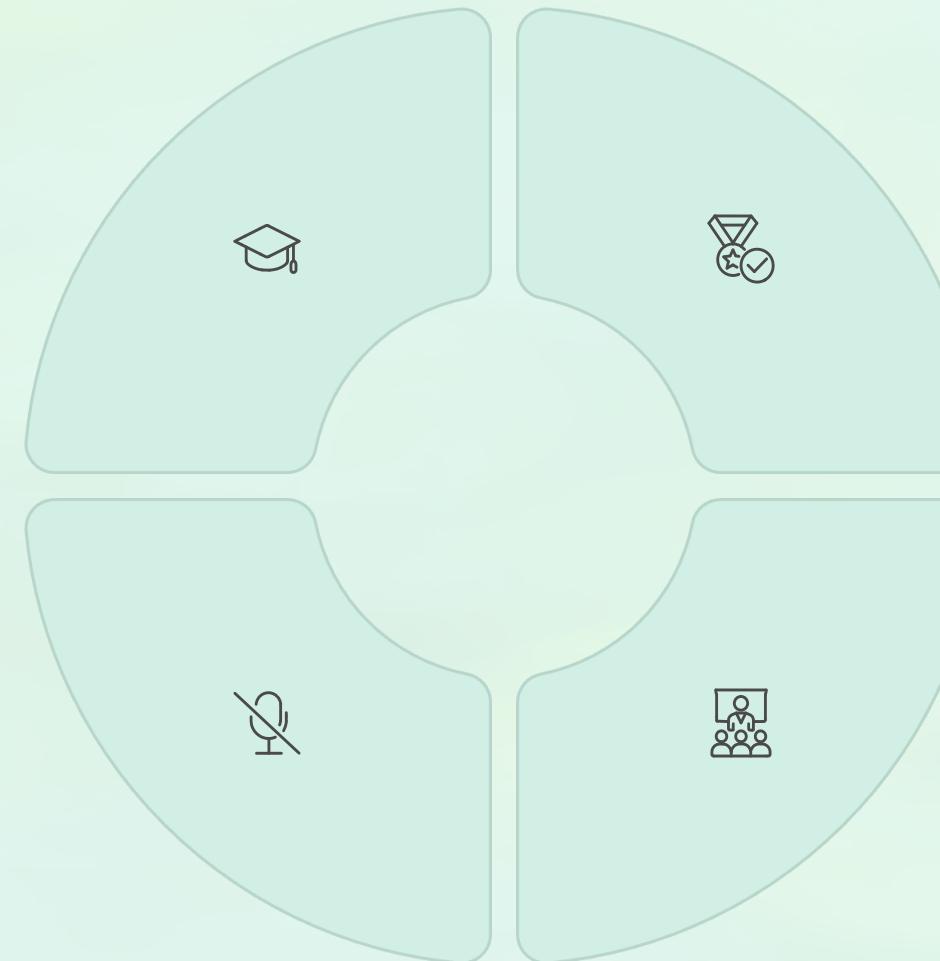
# Continuous Learning Matters

## Formal Education

CLE courses on law firm economics and financial management.

## Podcasts & Webinars

Regular doses of financial wisdom from industry experts.



## Certifications

Consider programs in financial planning or business management.

## Conferences

Attend bar association events focused on practice management.

Financial literacy is a career-long journey, not a destination.

# Fixing What's Broken Broken

Overcoming financial challenges requires acknowledgment, action, and resilience.





## Recognizing Financial Distress

### Warning Signs

- Increasing credit card balances month over month
- Difficulty making payroll or paying vendors on time
- Declining cash reserves
- Avoiding opening bills or checking bank balances
- Using operating funds to cover personal expenses
- Clients paying more slowly
- Partner disputes about money
- Stress affecting health or relationships

❑ Critical truth: Early detection and intervention prevent small problems from becoming crises.

# Steps to Recover from Setbacks

## 1 Face reality

Conduct a complete financial assessment — no avoidance or denial.

## 2 Stop the bleeding

Immediately halt non-essential spending and address urgent cash needs.

## 3 Create a recovery plan

Prioritize debts, negotiate with creditors, identify new revenue sources.

## 4 Seek professional help

Consult with financial advisors, accountants, or practice management consultants.

## 5 Execute consistently

Follow the plan with discipline and track progress weekly.

# Building Resilience and Adaptability



## Strong Financial Mindset

Cultivate abundance thinking, embrace learning, view setbacks as temporary.



## Emergency Fund

Build 3-6 months of operating expenses for practice and personal needs.



## Diversified Income

Explore multiple revenue streams — different practice areas, consulting, speaking, writing.

Resilience isn't about avoiding problems — it's about bouncing back stronger.

# Resources



## State Bar Law Practice Management

Expert guidance on financial systems, practice management, and business development for law firms.



## Lawyers Assistance Program

Confidential support for lawyers facing personal and professional challenges — including financial stress.



## Lawyers Helping Lawyers

Peer support network connecting attorneys for mentorship, guidance, and shared experiences.



## Financial Education

Curated books, webinars, podcasts on financial literacy tailored to legal professionals' unique needs.

You don't have to navigate financial challenges alone. These resources exist to support your journey to wellness.

# Your Call to Action

Financial wellness starts with one small step today.



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# Take Action This Week

1

## Assess your beliefs

Write down your top 3 beliefs about money — are they helping or hurting you?

2

## Track one week of expenses

Log every dollar for seven days — awareness is the first step to change.

3

## Schedule a financial review

Block time to review your practice financials and identify one improvement area.

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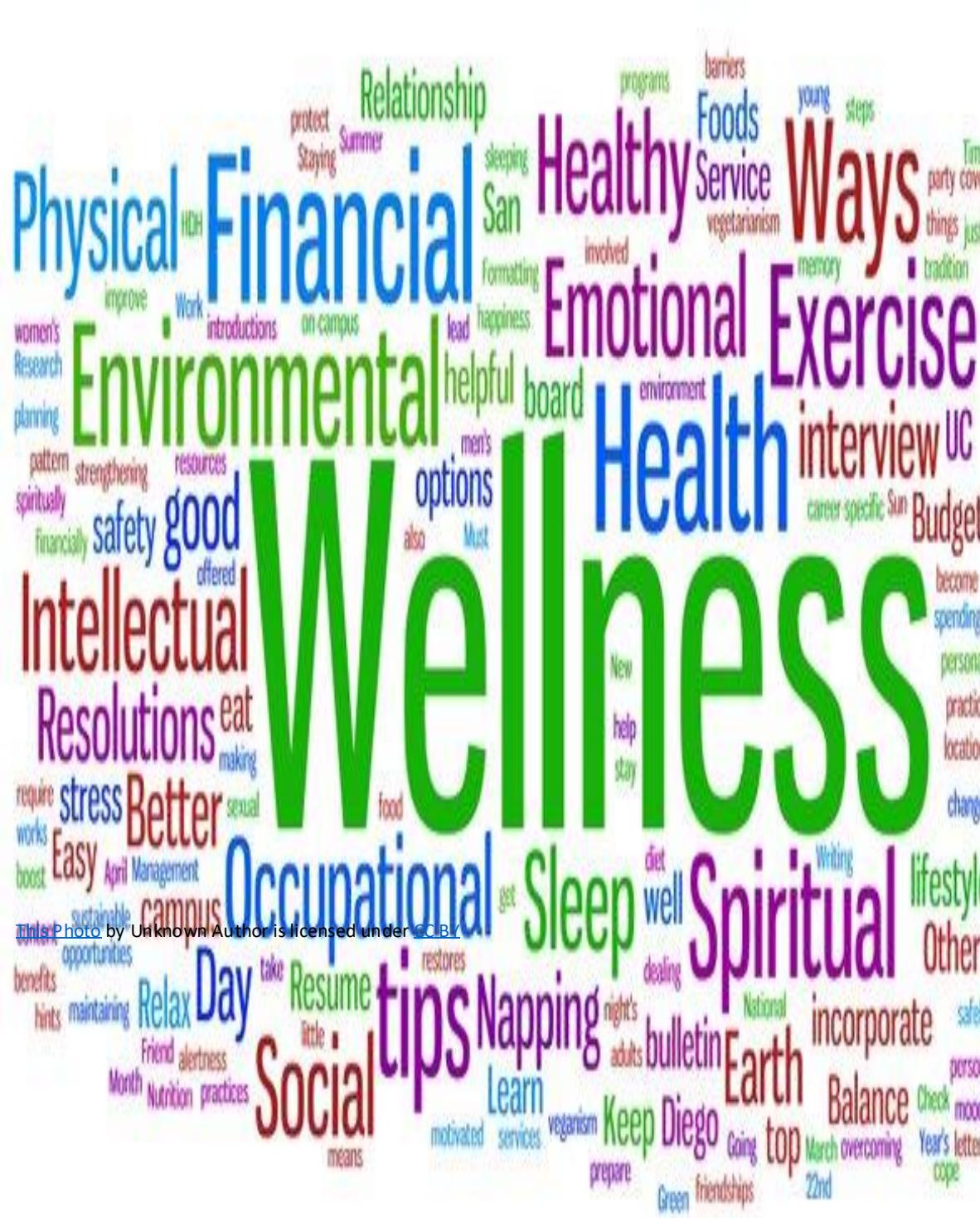
## Reach out for support

Contact one resource mentioned today — State Bar, LAP, or a financial advisor.

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## Share with a colleague

Start a conversation about financial wellness with someone you trust.



# Remember

## Financial wellness is not about perfection

It's about progress, awareness, and making choices aligned with your values and goals.

Every attorney deserves financial security and peace of mind.

Start where you are. Use what you have. Do what you can.



## Let's Connect

### **Javoyne Hicks**

Treasurer, State Bar of  
GeorgiaChair, Center for Lawyer  
Wellbeing Committee

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### **Georgia Lawyers Join the Center for Lawyer Wellbeing**

Be part of a community committed  
to supporting the holistic wellness  
of legal professionals across  
Georgia.

Together, we build healthier, more sustainable legal careers.



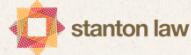
# South Carolina Bar

Continuing Legal Education Division

The Practice of Law Doesn't Have to be a  
Planation System

*Paul Knowlton*

A



# *Fundamentals and The Long Game*

Paul E. Knowlton, J.D., MDiv.  
Stanton Law LLC



**A Presentation to the South Carolina Bar | January 23, 2026**

1

## *Agenda*

*Fundamentals - Lawyer wellbeing over 30 years*

- Emotional
- Occupational
- Intellectual
- Spiritual
- Physical
- Social
- Wisdom & Recommended Reading

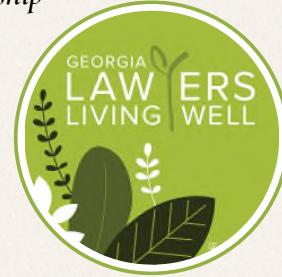


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# Agenda

*The Long Game - Bravery and Courageous Leadership*

- Create a Positive Narrative
- Cultivate Confidence
- Take Small Steps
- Find Connection
- Stay Calm

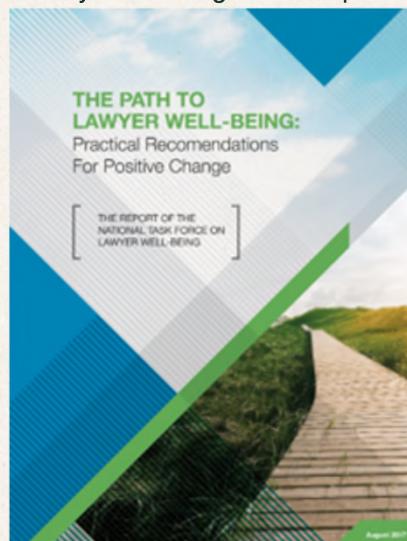


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## Introduction

The National Task Force on Attorney Well-Being 2017 Report

[LawyerWellbeing.net/the-report](http://LawyerWellbeing.net/the-report)



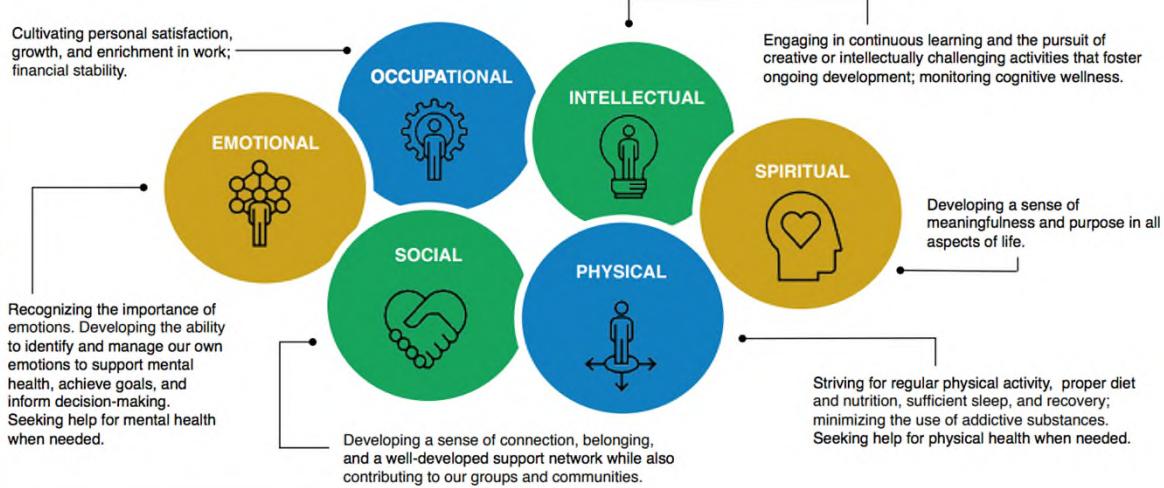
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# Defining Lawyer Well-Being

## Defining Lawyer Well-Being

A continuous process in which lawyers strive for thriving in each dimension of their lives:



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## EMOTIONAL HEALTH

### Early years, 0-10

Early as age 25-26

- Brain is just now fully developed for most people.
- Not every emotion you have is valid - learn how to listen and distinguish.
- You likely have a lot of knowledge; unlikely you're a wise or skilled decision maker.
- Start to acquire wisdom - read wisdom literature.
- **Have one or two senior counselors who are both skilled and trustworthy.**



Developing the ability to identify and manage our own emotions to:

Support mental health

Achieve goals

Inform decision-making

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## Mid-Years, 11-20

Early as age 35-36

- You've likely had some professional and personal successes and failures.
- Get an emotion check-up for the purposes of deciding whether you like who you're becoming.

EMOTIONAL  
HEALTH

01

Have you grown in discernment?

02

Can you apply wisdom to knowledge for the purpose of providing good counsel? You have to be better than AI or AGI.

03

Have you developed self-control?

7

## Later Years, 20+

Early as age 45-46

EMOTIONAL  
HEALTH



You've probably hit a meaningful life crisis by now or will soon.



Reject any notion of imposter syndrome.



Learn empathy for yourself and others.

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## Recommended Reading & Wisdom

You can have it all, just can't have it all at once.  
Pain is the price of being human.



As a Man Thinketh  
James Allen (1903)

Man's Search for Meaning,  
Viktor Frankl  
(Beacon Press, 2006)

Wisdom is One, H.W.  
Huntsman (1947)

The Art of Power,  
Thich Nhat Hanh  
(HarperOne, 2007)

Falling Upward,  
Richard Rohr  
(Jossey-Bass, 2011)

EMOTIONAL  
HEALTH

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OCCUPATIONAL

## Early Years

Early as age 25-26

- 2nd, 4th and 7th year attorneys tend to move firms or exit private practice.
- If you're in debt, you're at risk.
- 1500-1800 hr/yr billable is doable; 1800-2100 is difficult; 2100+ something will suffer.
- Mr. X and the practice as a plantation system. Also beware FBU firms.
- Plan the next 10 years but be ready to pivot based on outside factors.

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## Mid Years, 11-20

Early as age 35-36

12th year is another exit time and by 20th year only about 20% are still actively practicing fulltime in a firm.

You're an emerging leader if you want to be; acquire leadership skills you don't have.

Ideally settled on a platform you're comfortable with and entered the start of real professional and financial growth.

OCCUPATIONAL

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## Later Years, 20+

Early as age 45-46

- Internally, recognize you're ready to be the adult supervision in the room.
- Externally, recognize you're likely granted the presumption of being wise counsel by others.
- Become skilled at navigating change and crises, for yourself and others.

OCCUPATIONAL

### Recommended Reading & Wisdom



Try not to run from (unless really unavoidable) but run to. Speak only if you can improve the silence.

○ *Tao of Leadership*, John Heider (Bantam, 1986)

○ *The Art of Self-Promotion*, Debby Stone (Novateur, 2015)

○ *How to Grow Your Small Business*, Donald Miller (Harper Collins, 2023)

○ *Managing Transitions*, William Bridges (Da Capo Press, 2003)

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INTELLECTUAL

## Early years, 0-10

Early as age 25-26

Good leaders want you to focus on becoming a technically skilled lawyer.

Have an outlet that isn't the law.

Keep current on the pulse of cultural & political America.

Read and learn; wherever your outside life has you, be intellectually engaged beyond work.

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## Mid-Years, 11-20

Early as age 35-36

- After becoming a skilled lawyer, you can focus on learning business development, management, and leadership if that appeals to you.
- May not be a period of intellectual growth as you're consumed with life but keep some flame alive.
- Retirement is closer than you think. Get a good financial advisor; start intelligently investing/growing your wealth.



INTELLECTUAL

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## Later Years, 20+

Early as age 45-46

- You've hit your stride and loving lawyer life or you're miserable.
- If you're loving it, you're poised to become a legit thought leader & industry mover.
- If you're miserable recognize that's fine. Get back in touch with yourself.

INTELLECTUAL

## Recommended Reading & Wisdom

Figure out what makes you alive and pursue that.

The world needs more people who are alive.

- *The Book of Awakening*, Mark Nepo (Conari Press, 2000)
- *Leadership is an Art*, Max De Pree (Doubleday, 2004)
- *Democracy in Chains*, Nancy MacLean (Penguin, 2018)
- *Coming up Short*, Robert Reich (Knopf, 2025)

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## Early years, 0-10

Early as age 25-26

SPIRITUAL

- There's a distinction between religion and spirituality.
- Be clear about what gives your purpose.
- Let the Force be with you.
- Get at least an introduction to the spiritual and religious traditions of others but be discerning.
- Understand the rhythm of Order-Disorder-Reorder.

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## Mid-Years, 11-20

Early as age 35-36

SPIRITUAL

- You're not so busy that you can't have a regular prayer/meditation practice as an anchor.
- Cultivate mindfulness.
- Double down on Order-Disorder-Reorder.

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## Later Years, 20+

Early as age 45-46



- Likely some event(s) has painfully altered your world and your spirituality will need a rework. Ask, "Where is God in this?"
- Double down again on Order-Disorder-Reorder because your ego will eventually accept that you're not the master of the universe and you need to learn to surf waves rather than fight them.
- Connect with the terrifying freedom of not being able to or having to control everything.

SPIRITUAL

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## Recommended Reading & Wisdom



Learn to sit in the tension of unresolved issues.  
Develop Spiritual Intelligence (SQ)

*The Wisdom Pattern*, Richard Rohr  
(Franciscan Media, 2020)

*The Universal Christ*, Richard Rohr  
(Convergent, 2021)

*SQ2I*, Cindy Wigglesworth  
(SelectBooks, 2012)

## Early years, 0-10

Early as age 25-26



- Move Your Body! Regular exercise regimen of cardio + strength training.
- If you're billing stupid big hours, consider an afternoon nap (20-30mins).
- Don't eat crap food; don't over-indulge alcohol or caffeine; get enough sleep!

PHYSICAL

## Mid-Years, 11-20

Early as age 35-36

- You're busy but you can't afford not to continue regular exercise.
- Whatever excess weight is for your body type, keep it off.
- Eat and drink in moderation.

PHYSICAL

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PHYSICAL

## Later Years, 20+

Early as age 45-46

Get a good physician (include some Eastern medicine traditions if you can) and follow their advice. Reclaim and maintain good habits.

Add mobility/flexibility/stretching into your regimen.

Our bodies age. Nothing you can do to stop that. Incorporate something that's physically new and low impact; yoga, swimming, bicycling, rock climbing, etc.



Recommended  
Reading & Wisdom

Say no to "I'll rest when I'm dead."

*The Wellness Book*,  
Benson & Stuart  
(Birch Lane Press, 1992)

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## Early years, 0-10

Early as age 25-26



- Recover all the family and personal relationships you can that you lost or that slipped because of law school.
- Begin to develop your IN-PERSON, NON-WORK community. Begin with affinity groups.
- Look for mentors within and beyond the firm.
  - Block a full day where you're unplugged from work and a screen. Get out in nature at move at nature's pace.
  - Focus on developing a couple of close in-person friends than a database of virtual connections.



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## Mid-Years, 11-20

Early as age 35-36

SOCIAL

- Your social life will look different based on other decisions you've made. Just don't be isolated.
- Continue building social networks other than for business development, particularly in your neighborhood.
- Find your herd and settle in.

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## SOCIAL



## Later Years, 20+

Early as age 45-46

- Your friends are getting older.
- Begin giving back where your heart leads you.
- Get connected to a group/community where you're both metaphorically fed and can feed others.

### Recommended Reading & Wisdom



*15 Things You Should Give Up to be Happy,*  
Luminita Saviuc (Perigee, 2016)

Gotta go to your friends' funerals or they won't come to yours.  
Do things for others without expecting payback.

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### Bravery as a Choice



"I define courage as a willingness to take bold, risky action to serve a purpose that you perceive to be worthy, usually in the face of an abiding fear.... As Nelson Mandela famously said, it is not the absence of fear but triumph over it."

Every corner of the world needs courageous leadership.



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## Five Strategies to Drive Bold Action Amid Uncertainty



Create a Positive Narrative



Cultivate Confidence



Take Small Steps



Find Connection



Stay Calm

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## Bravery as a Skill



As the pace of change and disruption accelerates, courage – or lack of it – can make or break careers, organizations, and society. That's not to say leaders should take outsize risks. But most of us tend to be too cowardly, not too reckless.

Bravery is a skill that everyone in business today must learn and teach to others.



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# Thank You!

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State Bar of Georgia Attorney Wellbeing CLE Chair

Presentation designed by Jade McFarlane-Rowtham, Esq.  
Stanton Law LLC



# South Carolina Bar

Continuing Legal Education Division

## Boundaries: A Path to Wellness and Profitability

*Tara Simkins*

**Boundaries: A Path to Wellness and Profitability**

*Tara Rice Simkins, J.D., Master Certified Life & Money Coach*

*Founder, Soul Shine Labs • North Augusta, SC*

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# **Boundaries: A Path to Wellness & Profitability – WORKBOOK**

## **SECTION 1 – Foundations**

### **1. Journal Prompt: Your Current State**

- Where do you feel the most stretched thin in your practice today?
- What boundaries feel unclear, missing, or violated?
- How is this affecting your stress, relationships, and finances?

### **2. Prompt: Identifying Your “Burnout Cost”**

Reflect on ways burnout has cost you financially or professionally:

- Underbilling
- Lost opportunities
- Poor decisions
- Errors
- Lost clients
- Turnover
- Illness/fatigue

- Emotional exhaustion affecting performance

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## SECTION 2 — Internal Boundaries

### Journal Exercise: Boundaries With Yourself

- Where do you overspend your attention?
- What technology habits weaken your focus?
- What expectations of perfection drive unnecessary work?
- What self-imposed deadlines or “rules” create anxiety?

### Reset Prompt

What one internal boundary, if honored daily, would create the biggest shift?

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## SECTION 3 — External Boundaries with Others

### Client Boundaries

- What expectations need clarifying?
- Where does scope creep occur?
- Where do you over-accommodate or over-explain?
- What is your communication availability policy?

### Colleague Boundaries

- What requests do you say yes to automatically?

- Where do you take on emotional labor?
- What meetings could be declined or shortened?

---

## SECTION 4 – Emotional Intelligence + Boundaries

### Self-Reflection Exercise

<b>EI Skill</b>	<b>Boundary Impact</b>
Self-awareness	I notice early signs of stress before I react.
Self-regulation	I set the limit instead of lashing out or withdrawing.
Social awareness	I communicate limits with compassion.
Relationship skills	I maintain trust while holding boundaries.

Write about one moment this month where a boundary + EI skill improved your outcome — or could have.

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## SECTION 5 – Scarcity Patterns

### Prompt: Scarcity Tunneling

- Where do you become reactive?
- What situations trigger urgency, people-pleasing, or overworking?
- What thoughts drive your stress in those moments?

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## SECTION 6 – Profitability + Boundaries

### Reflection: How Boundaries Increase Your Revenue

Journal about:

- One client who takes more energy than the fee reflects
- One area where limiting availability would increase efficiency
- One way to reduce leakage of time
- One boundary that could help you raise your rates confidently

### Decision Quality Upgrade

Where do you make rushed decisions under pressure?

How would pausing or setting a boundary lead to better choices?

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## SECTION 7 – The SSL 25/5/3 Tool for Lawyers

*(Adapted for burnout + profitability)*

### Step 1 – 25 Resource Points

List 25 ways you are already resourced:

- Skills

- Colleagues
- Tools
- Time pockets
- Money
- Relationships
- Strengths
- Past successes
- Systems that work

## **Step 2 – 5 Scarcity Points**

Identify 5 areas where you feel pressure:

- Time
- Money
- Client expectations
- Technology overload
- Perfectionism
- Emotional fatigue

## **Step 3 – 3 Specific Actions**

Three small, repeatable steps for the next week that support profitable boundaries:

Examples:

- “I will not respond to email after 7 p.m.”

- “I will increase my minimum fee by 10%.”
- “I will set a 24-hour buffer before agreeing to new commitments.”
- “I will turn off notifications for one hour per day.”

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## **SECTION 8 – Implementation Plan**

### **Weekly Boundary Audit**

- What boundary did I set this week?
- Did I honor it?
- What changed in my stress, time, or revenue because of it?
- What boundary needs refinement?

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## **SECTION 9 – Closing Reflection**

- What does “a lawyer who lives well” look like in your life?
- Which boundary supports that vision the most?
- What is your commitment for the next 30 days?



SOUL SHINE LABS  
LIFE COACHING by TARA SIMKINS

# Summary: Boundaries, A Path to Wellbeing & Profitability

**Supporting Written Materials for Continuing Legal Education**

## BOUNDARIES: A PATH TO WELLNESS & PROFITABILITY

Tara Rice Simkins, J.D. • Soul Shine Labs • SC Bar 2026 Convention

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### A Burned-Out Lawyer Is a Broke Lawyer

The modern practice of law demands boundary skills the profession never taught. Technology, 24/7 availability, and increasing client expectations have dissolved the natural buffers that once protected lawyers' wellbeing. Today, **healthy boundaries are not optional — they are a core competency that protects your mind, your practice, and your bottom line.**

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### WHY BOUNDARIES MATTER

## **1. Lawyer Burnout Is a Crisis**

- 44% of lawyers report high burnout (IWIL, 2023).
- Chronic stress undermines judgment, sleep, immunity, and decision quality.
- Burnout leads to errors, turnover, and financial loss.

## **2. Technology Has Eliminated Natural Boundaries**

Constant notifications =

- Decreased task performance
- Increased anxiety & depression
- Attention fragmentation

(Taken from Simkins CLE, 2023)

## **3. Exposure to Crisis Cycles Intensifies Distress**

Continuous news and trauma reporting increase:

- Catastrophizing
- Stress reactions

- PTSD-like symptoms

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## BOUNDARIES + EMOTIONAL INTELLIGENCE (EI)

Ronda Muir (*Beyond Smart*, ABA 2025) shows EI is a **core lawyering skill**.

High-EI lawyers:

- Regulate emotions under pressure
- Improve decision-making
- Build client trust
- Increase profitability

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**EI is what allows lawyers to set boundaries without conflict, guilt, or reactivity.**

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## THE SCARCITY EFFECT: WHY LAWYERS OVERWORK

Research by Mullainathan, Shafir, Zhao & Tomm, and Mani et al. demonstrates:

- Scarcity narrows attention (“tunneling”)
- Impairs planning and executive function
- Triggers overworking + undercharging
- Elevates cortisol → burnout

**Scarcity keeps lawyers doing more while accomplishing less.**

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## THE PROFITABILITY LINK

Boundaries increase revenue by:

- Reducing time leakage
- Preventing scope creep
- Improving focus and accuracy
- Enabling higher-value decision-making
- Increasing client satisfaction
- Supporting sustainable capacity

**Clear boundaries = clear expectations = clearer billing + fewer errors + healthier margins.**

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## THE FIVE BOUNDARY SKILLS EVERY LAWYER NEEDS

1. **Awareness** of stress triggers + energy drains
2. **Pause before yes** (24-hour buffer rule)
3. **Availability clarity** (email, calls, urgent vs. non-urgent)
4. **Emotional regulation** under pressure
5. **Self-honoring follow-through**

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## FAST WORKSHEET: THE SSL 25/5/3 TOOL

A simple, research-backed practice for grounding, clarity, and abundance.

### **25 Resource Points:**

List 25 ways you are already supported (skills, time pockets, relationships, tools).

## **5 Scarcity Points:**

Identify 5 pressures (time, money, clients, tech overload).

## **3 Specific Steps:**

Choose 3 repeatable actions for the next week, such as:

- No email after 7 p.m.
- Raise your minimum fee by 10%.
- Silence notifications for one hour/day.
- Add a pause before accepting new commitments.

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## REFLECTION PROMPTS

- Where do I need a boundary most urgently?
- How is lack of a boundary costing me money or time?
- Which boundary will most support my wellbeing this month?

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## FINAL NOTE

Boundaries are not walls — they are **professional scaffolding** that support clarity, compassion, emotional steadiness, and sustainable success.

When lawyers learn to set and honor boundaries, they do more than avoid burnout.

They **practice better, lead better, and live better.**

## **Boundaries: A Path to Wellness and Profitability**

*Tara Rice Simkins, J.D., Master Certified Life & Money Coach*

*Founder, Soul Shine Labs • North Augusta, SC*

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# **Introduction: Why Boundaries Are Now a Core Competency in Law**

“A burned-out lawyer is a broke lawyer.”

This isn’t a metaphor — it is an evidence-based reality.

The modern practice of law has shifted faster than the culture of the profession. Technology has dissolved the natural buffers lawyers once relied on: closed office doors, limited business hours, courts that did not issue orders at midnight, and clients who couldn’t reach their attorneys every second of the day.

In this always-on environment, **lawyers must consciously build the skill that the profession never trained them for: boundaries**. Not as emotional indulgence, but as a **professional competency** linked to:

- Decision-making quality
- Emotional intelligence
- Reputation management
- Profitability
- Sustainable lawyering
- Long-term wellbeing

This written presentation weaves together Tara Simkins’s previous CLEs for the State Bar of Georgia, her Georgia Bar Journal article, and current research on burnout, emotional intelligence, and scarcity psychology to present one cohesive and modern argument:

**Boundaries are no longer optional. They are essential to practicing law well — and making money doing it.**

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# Section 1 — The State of the Profession: Why Lawyers Are Burning Out

Research across the profession shows alarming trends:

## 1. Burnout is widespread and worsening

- 44% of lawyers report high burnout levels (Institute for Well-Being in Law, 2023).
- Younger lawyers report the highest stress and lowest job satisfaction.
- Burnout predicts turnover, errors in judgment, compassion fatigue, and withdrawal from practice.

## 2. Lawyers experience chronic stress at levels higher than physicians

- Lawyers rank among the top professions for depression, anxiety, and substance misuse.
- Chronic stress impairs prefrontal cortex functioning — the part of the brain responsible for judgment, analysis, and decision-making.

## 3. Technology has dissolved the boundaries lawyers once relied on

Forty years ago, the practice of law looked much different... Technology has eroded cultural and physical boundaries but keeps you on guard and on edge.

The combination of smartphones + email + constant notifications creates:

- Overarousal
- Interrupted attention
- Cognitive fatigue
- Decreased task performance
- Increased anxiety and depression

## 4. Exposure to ongoing crisis cycles compounds mental load

Continuous news, crisis headlines, and trauma reporting (especially for lawyers who work in high-stakes areas) activate the amygdala and trigger secondary trauma responses. Research shows:

- Increased anxiety
- Catastrophizing
- Attention tunneling
- PTSD-like symptoms

**Conclusion:**

The environment lawyers operate in today **requires** boundaries because the natural, structural boundaries of the profession are gone.

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## **Section 2 — Boundaries: What They Are and What They Are Not**

Setting and honoring boundaries requires a higher level of emotional intelligence than issuing a request. It is a skill you practice with yourself and with others.

**Boundaries are NOT:**

- Controlling other people
- Punishment
- Demands
- Withdrawal
- Emotional walls

**Boundaries ARE:**

- Clear statements of what you will do to protect your time, energy, attention, and capacity

- Professional scaffolding that supports wellbeing
- A method of reducing unnecessary stress
- A tool of emotional regulation
- A prerequisite to sustainable productivity

## Two categories of boundaries lawyers must master:

1. **Internal boundaries** — with technology, time, perfectionism, expectations, emotional reactivity, and work habits
2. **External boundaries** — with clients, colleagues, family, staff, judges, partners, and supervisors

Both categories directly impact financial performance.

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## Section 3 — The Emotional Intelligence Connection

Ronda Muir, in *Beyond Smart: Lawyering with Emotional Intelligence* (ABA, 2025), argues that EI is not a soft skill but a **core competency for effective lawyering**.

EI includes:

- Self-awareness
- Self-regulation
- Social awareness
- Relationship management

According to Muir, lawyers who are high in EI:

- Make better decisions

- Resolve conflict more efficiently
- Build more trust with clients
- Communicate value with clarity
- Reduce reactivity and impulsivity
- Increase profitability

## Why?

Because EI governs the ability to set clear, compassionate boundaries from a grounded emotional state.

**Emotionally intelligent lawyers make better decisions and more money.**

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## Section 4 — The Scarcity Effect: Why Lawyers Don't Set Boundaries

The neuroscience of scarcity is well documented in the research of Zhao & Tomm, Mullainathan & Shafir, Mani et al.:

### Scarcity triggers “tunneling”

- Narrowed focus
- Loss of perspective
- Impulsive decision-making
- Overworking
- Undercharging
- Reactivity

### Scarcity makes lawyers vulnerable to burnout

Chronic stress elevates cortisol:

- Fatigue
- Sleep disruption
- Immune suppression
- Cardiovascular strain
- Irritability
- Executive dysfunction

### **Scarcity → poor boundaries → lower profitability**

Scarcity keeps lawyers:

- Overworking
- People-pleasing
- Avoiding hard conversations
- Undervaluing their time
- Remaining constantly available
- Postponing rest, exercise, and strategic planning

Scarcity keeps you doing the things that keep you from seeing opportunities to set boundaries..

This is the heart of burnout economics.

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## **Section 5 — Boundaries as a Profitability Strategy**

When lawyers lack boundaries, they:

- Overwork low-fee clients
- Under-bill their time
- Say yes to non-revenue tasks
- Accept scope creep
- Fail to raise rates
- React instead of plan
- Make avoidable errors

When lawyers **set and honor boundaries**:

**1. Revenue increases**

- Clear scopes of work
- Aligned client expectations
- Less leakage of time
- Less rework due to errors
- Greater ability to focus on high-value matters

**2. Decision quality improves**

Scarcity studies show cognition improves dramatically when stress is relieved.  
(Sugarcane study: 10-point IQ difference.)

**3. Client satisfaction rises**

Clients value clarity, reliability, and emotional steadiness — all outcomes of good boundaries.

**4. Turnover decreases**

Lawyers with strong boundary practices report higher satisfaction and resilience.

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# Section 6 — The Five Core Boundary Skills Every Lawyer Must Master

## 1. Awareness of your personal stress patterns

Technology triggers perfectionism, people-pleasing, urgency addiction.

## 2. The ability to pause before agreeing

Say: “I’ll take a look at my calendar and get back to you.”

## 3. Clarifying professional availability

Office hours, return-times, expectations for urgent requests.

## 4. Emotional regulation under pressure

EI techniques, grounding practices, and Tara’s 25/5/3 method.

## 5. Self-honoring follow-through

Keeping the promises you make to yourself.

Boundaries are not simply protective — they are **productive**.

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# Conclusion

Lawyers who master boundaries experience:

- Less burnout
- Clearer decision-making
- Higher profitability
- Better client relationships
- Increased wellbeing

- A sustainable legal career

**Boundaries are a professional skill set — one that must be taught, practiced, and continually refined.**



SOUL SHINE LABS  
LIFE COACHING by TARA SIMKINS

# Boundaries for Lawyers: Quick Weekly Checklist

Supporting Written Materials for Continuing Legal Education

Remember: *A Burned-Out Lawyer Is a Broke Lawyer*

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## ✓ 1. Boundary Awareness

- I know my top 3 stress triggers.
- I notice when I'm slipping into urgency or people-pleasing.
- I can identify when tech overload is draining my focus.

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## ✓ 2. Before I Say Yes

- I pause before agreeing to new work.
- I use the 24-hour buffer rule when possible.
- I check whether the request aligns with my priorities.

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## 3. Clear Availability

- I have communicated when I respond to email and calls.
- I define what counts as “urgent.”
- I limit after-hours communication unless required.

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## 4. Scope & Time Protection

- I clarify scope with every client or colleague.
- I address scope creep early and directly.
- I protect focused work time (no interruptions, no notifications).

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## 5. EI-Based Boundary Communication

- I speak from calm, grounded emotion.
- I set limits without over-explaining or apologizing.
- I acknowledge others’ needs while honoring my own.

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## 6. Profitability Boosters

- I avoid undercharging and underbilling due to stress or guilt.
- I protect my highest-value work hours.

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- I choose tasks that generate revenue, not reactivity.

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## 7. SSL 25/5/3 Reset (Weekly)

**25:**  I listed 25 resources supporting me.

**5:**  I named 5 scarcity pressures.

**3:**  I chose 3 small, repeatable steps for this week.

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## 8. Quick Reflection

- What boundary improved my week?
- What boundary needs reinforcement?
- What boundary will support my wellbeing *today*?

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## YOU'RE DONE IN 60 SECONDS

Use this checklist daily or weekly to reduce burnout, make stronger decisions, and increase your long-term profitability and satisfaction in the practice of law.

