



15.5
CLE CREDIT
HOURS
(1 HR ETHICS INCLUDED)

2025 LEADERSHIP INSTITUTE

WHAT YOU NEVER LEARNED IN LAW SCHOOL
CREATED BY GENERAL COUNSEL FOR GENERAL COUNSEL



APRIL 8-10 & MAY 6-8, 2025
SMU COX SCHOOL OF BUSINESS
DALLAS, TEXAS



Navigate today’s complex legal landscape with confidence. The Texas General Counsel Forum’s Leadership Institute equips you with the vision, understanding, clarity and agility to lead your legal team to success.

The Texas General Counsel Forum Leadership Institute is a transformative experience designed to elevate in-house legal leaders. Led by renowned faculty from SMU Cox School of Business, this intensive program combines academic rigor with practical insights. Participants gain a deep understanding of business strategy, financial acumen and leadership best practices, empowering them to drive organizational success.



2025 PRICING (PER PERSON)

	Early Bird Price	After 2/17
Forum Members	\$3,800	\$4,200
Non-Members		\$5,500

Join today to take advantage of member pricing at www.tgcf.org/membership.

PROGRAM BENEFITS

- 15.5 CLE credit hours (1 hour ethics included) over 6 days
- All study & classroom materials provided
- Certificate of completion
- Continental breakfast, lunch & refreshments
- Attendee directory

IMPORTANCE OF LEADERSHIP

Legal leaders are called to manage and lead beyond what they know. This is why the Texas General Counsel Forum’s Leadership Institute was created in 2006 to provide the tools and skills to excel in these unique leadership roles. Partnering with the SMU Cox School of Business, the Leadership Institute provides real world scenarios to prepare you to be a stronger leader in your in-house role.

REGISTER TODAY

Scan the QR code or visit:
www.tgcf.org/leadership-institute



INSTITUTE ALUMNI

- | | |
|-------------------------------------|-------------------------------|
| 7-Eleven, Inc. | JCPenney |
| Austin Industries | Kimberly-Clark |
| AT&T Inc. | Lennox International |
| Baylor Scott & White Health | LyondellBasell |
| Ben E. Keith | Mattress Firm, Inc. |
| Celanese | North Texas Tollway Authority |
| CenterPoint Energy | NTA Life |
| Chevron Phillips Chemical Co. | ORIX Corporation USA |
| Children’s Health System of Texas | Orthofix Medical Inc. |
| CITGO Petroleum Corporation | PepsiCo, Inc. |
| Comerica Bank | Rent-A-Center, Inc. |
| Cook Children’s Health Care System | Ryan, LLC |
| Dell Technologies | Southwest Airlines Co. |
| FedEx Office & Print Services, Inc. | Texas Instruments Inc. |
| GM Financial | The Weir Group PLC |
| Goldman Sachs | Topgolf |
| Interstate Batteries | Trinity Industries, Inc. |
| | Varsity Brands, LLC |
| | Vistra Energy |

CANCELLATION POLICY

All payments are non-refundable. Fees must be paid in full to reserve a place in the Leadership Institute. If you cannot attend, you may send a substitute or attend a future Leadership Institute. In the event the Texas General Counsel Forum has to cancel or postpone the Leadership Institute, your payment will be fully refunded.

DAY 01: TUESDAY, APRIL 8

8:30 AM	Networking Breakfast
9:30 AM 1.5 Hrs. CLE	Making Ideas Stick: Leading Your Legal Department and Overseeing Your Company's Legal Priorities with Effective, Targeted Messaging Jason Rife
12:00 PM	Lunch
1:00 PM 2.0 Hrs. CLE	Creativity, Innovation & Risk: Your Legal Decision Making, Messaging and Actions Venky Shankar
5:00 PM	Evening Networking Reception

DAY 02: WEDNESDAY, APRIL 9

7:30 AM	Networking Breakfast
8:30 AM 2.0 Hrs. CLE	Introduction to Financial Reporting: Advising Your Client and Navigating Financial Reporting in Making Legal Decisions for the Company Greg Sommers
12:30 PM	Lunch
1:30 PM No CLE	Managing Through Influence: Enhancing Your Legal Leadership Through Influence and Trust Jerry Magar
5:30 PM	Dismissal

DAY 03: THURSDAY, APRIL 10

7:30 AM	Networking Breakfast
8:30 AM 2.0 Hrs. CLE	Financial Statement Analysis: Providing Legal Advice with an Understanding of Strategic Financial Statement Analysis Hemang Desai
12:00 PM	Lunch
12:30 PM No CLE	Authentic Presence: Legal Leadership Through Authentic Presence Kimberly Davis
4:00 PM	Dismissal

THANK YOU TO OUR SPONSORS**DAY 04: TUESDAY, MAY 6**

8:30 AM	Networking Breakfast
9:30 AM 1.0 Hr. Ethics	Corporate Governance and Ethics: Crucial for In-House Leadership Hemang Desai
12:00 PM	Lunch
1:00 PM 2.5 Hrs. CLE	Value-Based Management: Providing Legal Guidance Based on Various Business Valuation Measures Greg Sommers
5:00 PM	Dismissal

DAY 05: WEDNESDAY, MAY 7

7:30 AM	Networking Breakfast
8:30 AM 2.0 Hrs. CLE	Five Behaviors of a Cohesive Team: Leading Your Legal Department David Bertrand
12:30 PM	Lunch
1:30 PM No CLE	Building Capability Through Coaching & Mentoring: Leading Your Legal Department Pam Van Dyke
5:30 PM	Dismissal

DAY 06: THURSDAY, MAY 8

7:30 AM	Networking Breakfast
8:30 AM 1.5 Hrs. CLE	Innovation - Human Centered Design: Strategic Legal Leadership Tim Sutton
12:00 PM	Lunch
12:30 PM 1 Hr. CLE	Legal Leadership in a VUCA World Jerry Magar
4:00 PM	Dismissal



The Institute greatly enhanced my in-house business effectiveness. The small, interactive classes, taught by top-notch MBA faculty, helped me focus on legal issues through both a business and leadership lens.”

CHRIS WILLIS

Chief People & Administrative Officer at PrimeSource Building Products
Leadership Institute Alumnus

DAY 01: TUESDAY, APRIL 8, 2025

9:30 AM – 12:00 PM | 1.5 HOURS CLE

Making Ideas Stick: Leading Your Legal Department and Overseeing Your Company's Legal Priorities with Effective, Targeted Messaging

Jason Rife, Senior Assistant Dean of the Career Management Center & Graduate Admissions, Lead Instructor of Graduate Business Communications Course, SMU

In-house lawyers will learn how to better communicate the department's ideas on legal issues both in the department and throughout the company in a way that is memorable and influential. Using real life examples that you may face in your legal department and focusing on six key principles, we will work on ways to improve your legal communications using language that is simple and concrete, as well as how to use elements of emotion, surprise and story to make sure that the legal department and the company employees will remember and can act on your messages and priorities. This session will utilize video clips, classroom interaction and an application exercise to reinforce the concepts and how they can be used.

1:00 PM – 5:00 PM | 2.0 HOURS CLE

Creativity, Innovation & Risk: Your Legal Decision Making, Messaging and Actions

Venky Shankar, Professor of Marketing, Harold M. Brierley Endowed Professor, SMU

Successful leaders must strike a balance between complexity and ensuring proper safeguards and procedures, while also encouraging creativity and innovation, which involves some level of risk taking. In-house counsel will engage in an experiential exercise to demonstrate and explore these tensions, allowing them to discover key factors that can contribute to greater creativity and innovation which in turn can lead to better legal decisions, messaging and actions within the department and across the company. Emphasis will be on evidence-based modeling encouraging innovation and will help in-house counsel develop areas for growing both individual creativity skills and organizational practices that support risk-taking and innovation.

DAY 02: WEDNESDAY, APRIL 9, 2025

8:30 AM – 12:30 PM | 2.0 HOURS CLE

Introduction to Financial Reporting: Advising Your Client and Navigating Financial Reporting in Making Legal Decisions for the Company

Greg Sommers, Professor of Practice, SMU

In-house counsel need to understand the basic financials of its client, the company. Legal advice should be predicated on an understanding of the company's financial position. In this session, in-house counsel will learn and engage with financial module reviews, including income, balance sheet and cash flow statements and their interrelation. This module provides detailed examination of the information conveyed by financial statements. It enhances your understanding of the difference between earnings and cash flows and the implications of the difference, assisting you in providing better legal advice to the company. Real world scenarios will be utilized, allowing you to interact with other in-house counsel to make legal recommendations based on the financial picture of the company.

1:30 PM – 5:30 PM | NO CLE

Managing Through Influence: Enhancing Your Legal Leadership Through Influence and Trust

Jerry Magar, Founding Partner, People Systems Consulting

In an increasingly complex and collaborative work environment, a distinguishing characteristic of a successful in-house leader is the ability to build and maintain trusting relationships. This ability distinguishes those who flourish from those who falter. In-house counsel are expected and required to achieve impressive results on a continual, time-critical basis within their departments, across the company, and at C-Suite and Board levels. In this session, in-house counsel will learn and practice leveraging influence to create more productive and successful relationships with your Board, your bosses, your peers, your team and with other employees at the company.

DAY 03: THURSDAY, APRIL 10, 2025

8:30 AM – 12:00 PM | 2.0 HOURS CLE

Financial Statement Analysis: Providing Legal Advice with an Understanding of Strategic Financial Statement Analysis

Hemang Desai, Distinguished Professor and Accounting Dept. Chair, SMU

General Counsel and other in-house lawyers need an understanding of the company's financial strategies in order to better advise their client. With this in mind, this session will focus on an introduction to the basic principles underlying U.S. GAAP, core financial statements and the information contained therein. This session will focus on developing a framework for strategic financial statement analysis. Through a series of ratios, we will examine how a company's strategy or its business model is reflected in its financials. The ratios will also permit an assessment of how well leadership has executed its strategy and provide key information on how to advise and direct the company on legal matters pertaining to finance. The key takeaways will be (i) an understanding of key drivers/levers of your company's performance, (ii) how the business story is reflected in the company's financials and (iii) how to provide better legal advice with this knowledge.

12:30 PM – 4:00 PM | NO CLE

Authentic Presence: Legal Leadership Through Authentic Presence

Kimberly Davis, Consultant, Speaker and Author of Brave Leadership

Successful in-house leaders approach the world with an authentic presence. This powerful and engaging session will explore why you do what you have chosen to do professionally. What is the impact you want to have on your legal department, your client, your colleagues and your community through the work that you do? In this session, in-house counsel will explore enhanced leadership skills by engaging your authentic presence.

DAY 04: TUESDAY, MAY 6, 2025

9:30 AM – 12:00 PM | 1.0 HOUR ETHICS CLE

Corporate Governance and Ethics: Crucial for In-House Leadership

Hemang Desai, Distinguished Professor and Accounting Dept. Chair, SMU

In-house counsel understand the essential role ethics plays in business, especially as it pertains to corporate governance and financial reporting. This session will address multiple critical topics including in-house leadership's responsibility over financial reporting, corporate ethics, governance and control failures and their implications. The discussion will center around two real case situations. We will examine the above issues with a critical lens discussing the roles (or failure) of the leadership team, the board, auditors, analysts and institutional investors and how in-house leadership can help steer positive outcomes.

1:00 PM – 5:00 PM | 2.5 HOURS CLE

Value-Based Management: Providing Legal Guidance Based on Various Business Valuation Measures

Greg Sommers, Professor of Practice, SMU

In many circumstances, in-house legal advice needs to take into consideration the company's various business valuations. Business valuations include diverse forms of value measurements intended to both understand a company's position and maximize the health and well-being of the organization. These may include historical value, exit value, entry value, fair value, economic value, shareholder value, customer value, supplier value, and stakeholder value. Measurements of these various forms of value take many forms – from economic models to present value to estimates. This discussion will lead in-house counsel through various business valuations and give you a hands-on approach on how to use these valuations in legal decision-making that focuses on the long-term success and prosperity of the company.

DAY 05: WEDNESDAY, MAY 7, 2025

8:30 AM – 12:30 PM | 2.0 HOURS CLE

Five Behaviors of a Cohesive Team: Leading Your Legal Department

David Bertrand, Director & Associate Clinical Professor, SMU

As the leader of a legal department and/or as part of the broader executive team, you know the importance of creating an effective team. In this session, in-house counsel will learn how to use The Five Behaviors® model to assist in building a stronger legal department with a culture of true teamwork. Think about it for a moment... how is it that some legal teams with less talent and experience can consistently outperform more talented and experienced legal teams? Strong, cohesive legal teams create a competitive advantage by establishing differentiating leadership behaviors in the areas of building trust, mastering conflict, achieving commitment, embracing accountability, and focusing on results. In this session in-house counsel will learn how to become a better team player by exploring the five behaviors, your preferences and tendencies with each one, and new habits you might embrace to accelerate the team building process. In-house counsel can then use these tools to build a stronger more productive legal team.

1:30 PM – 5:30 PM | NO CLE

Building Capability Through Coaching & Mentoring: Leading Your Legal Department

Pam Van Dyke, Consultant, Speaker & Adjunct Professor, SMU

In-house leadership knows the importance of having high functioning, self-driven members on their legal department team. Recent research conducted by several sources, (Merrill, Harvard, Forbes) suggests that more and more organizations are moving away from a “command and control” top-down approach to leadership to more of a “coaching” style of leadership. Teams who establish coaching as an organizational competence experience more employee engagement and talent retention. In this session, in-house counsel will learn what it means to have a coaching mindset that is focused on shifting from a directive to a coaching leadership style. Through interactive exercises using real life scenarios that can occur in your law department, in-house counsel will learn how to effectively conduct conversations that impact both performance and development of in-house lawyers and other members of the legal department.

DAY 06: THURSDAY, MAY 8, 2025

8:30 AM – 12:00 PM | 1.5 HOURS CLE

Innovation - Human Centered Design: Strategic Legal Leadership

Tim Sutton, Academic Director, Strategic Thinking for a Competitive Advantage

In-house counsel and legal departments are routinely asked to tackle very complex legal matters. The best solutions may not be immediately obvious. Nimbleness and innovation are key. Complex and ingrained problems require a means through which to discover the way to the best solution. In-house counsel will explore a process which provides a way to move forward even when the solution might not appear obvious. Design decisions fit into a larger context which includes history, politics, sustainability, ethics, relationships and aesthetics. This will allow you to search for solutions and lead your legal team to understand and utilize design impact.

12:30 PM – 4:00 PM | 1.0 HOUR CLE

Legal Leadership in a VUCA World

Jerry Magar, Founding Partner, People Systems Consulting

VUCA stands for Volatile, Uncertain, Complex and Ambiguous. Traditional legal leadership is not enough in a VUCA world. Although leading in a VUCA world presents challenges, it opens the door to an array of skills that will enable in-house counsel to succeed and excel as leaders. Leaders and their legal teams need to develop the mental capabilities and desire to avoid being left behind. In this session in-house counsel will explore tactics that enhance successful leadership in a VUCA world.

ABOUT THE FORUM

Founded in 1998, the Texas General Counsel Forum brings together in-house leaders from across the state. Unlike similar organizations, only general counsel and senior managing counsel with significant leadership and management responsibilities in a corporation, non-profit organization or government agency are eligible for membership.

The Forum is a boutique organization of in-house leaders who share legal best practices in a networking community. Our goal is to build relationships and provide knowledge through strategic programming and networking hosted statewide, virtually, and in our chapter cities of Austin-San Antonio, Dallas-Fort Worth and Houston.

The Texas General Counsel Forum serves as the premier organization among statewide in-house and outside legal leadership for relationship building, best practices exchange, continuing education and thought leadership relating to the business of practicing law.



BEST PRACTICES



NETWORKING



LEADERSHIP



To learn more & apply, scan the QR code or visit: www.tgcf.org/membership

MEMBERSHIP LEVELS

INDIVIDUAL CORPORATE	\$600
INDIVIDUAL GOV'T/NON-PROFIT	\$300
CORPORATE LEGAL DEPARTMENT General counsel & up to 3 managing counsel. Additional members \$300 each.	\$1200
GOV'T/NON-PROFIT LEGAL DEPARTMENT General counsel & up to 3 managing counsel. Additional members \$225 each.	\$900
CORPORATE MENTORING SPONSOR General counsel & up to 8 managing counsel. Additional members \$300 each.	\$2500

All memberships are valid for the duration of the calendar year (January 1 - December 31)

Navigate today's complex legal landscape with confidence. The Texas General Counsel Forum's Leadership Institute equips you with the vision, understanding, clarity and agility to lead your legal team to success.

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