Q&A With Yan Ross, Continuing Legal Education (CLE) Presenter and Renaissance Man

by Tim Baran on August 12, 2009

in Interview and Feature

Yan Ross is an attorney admitted to practice in multiple jurisdictions and one-time general counsel to members of congress, presidential appointee, university faculty, published author, consultant for businesses and financial institutions, and entrepreneur and now a CLE presenter.

He was recently selected by the Arkansas State Bar to present a series of CLE sessions on ethical issues for attorneys.

He graciously agreed to share his story and thoughts about CLE with us.

Yan, How did your fascinating journey evolve and why CLE?

You've chosen an excellent descriptive word — "journey" — and my current CLE work is another stop along the way. Without re-listing each of my professional incarnations, I can track how each of them occurred when my skills and knowledge in one area intersected with an opportunity and demonstrated need in the economy and society.

Nearly every transition has involved overlap, from one professional activity to another. My educational pursuits in particular have grown from gaining expertise from practicing in a given area and wanting to share that capability with others.

My courses have been accredited by the governing bodies of numerous professional disciplines, as diverse as CPAs, financial planners, real estate licensees, and even funeral directors! Continuing Legal Education represents the aspect of the courses where legal issues, and ethics in particular, are involved, so it's a natural outgrowth of my more generalized educational work.

What topics do you cover?

At present, the accredited courses I have developed specifically for CLE purposes are oriented toward ethical issues that come up in specific types of representation or practice areas.

Ethical Issues Involved in Use of the Internet
Representing Holders of Protected Information (Identity Theft Issues)
Reverse Mortgages and Representing Seniors and Their Families
Representing Financial Advisors

My expertise in these areas arose from related professional pursuits. For instance, in my work as Director of Special Projects with the Institute of Consumer Financial Education (www.icfe.info), I conducted a national identity theft services survey, and also authored the course on Reverse Mortgages (CHECMS).

For the past several years, I have been steeped in the law and practice of identity theft risk management, so it's a short step to creating and presenting materials on the subject for attorneys to use in their representation of clients affected by these issues.

I am currently preparing a course on the FTC's pending "Red Flags Rules" on risk management practices required of many types of holders of consumer information that is vulnerable to perpetrators of identity theft. Due to the way in which the Rules were promulgated and will be applied, the enforcement date has been postponed several times. One of the more surprising aspects of this regulation is that certain law firms will also be subject to the requirements — not just their clients!

You have a few websites. Where can someone go for information on your CLE activities?

You've touched a soft spot in my online presence — there's no single URL at this moment. You can, however, see some of the relevant online pages via these links:

http://cleinteractive.net/index.cfm?Section=23&PageNum=170

http://www.avalonstrategies.com/idtheft.html

I'm awaiting the scheduling of several additional sessions by specific sponsoring organizations, and I can send additional links when they are posted.

What can we expect from you and your CLE endeavors in the future?

As you've observed, my broad range of interests leads me to consider at any given time which topics are both timely and substantively required for attorneys in the development of their own practices. One example is my current work for a client engaged in non-food ethanol production; there are so many issues involved, some technical and some just practical in nature, so I am looking at the possibility of creating CLE material on several of them.

While I do recognize that there is a particular demand for ethics-related courses, my own professional interests and endeavors will determine which subjects end up on the CLE menu.

The economy has forced the change-adverse legal profession to reconsider the way it operates. Are there changes you wish to see happen?

Let me respond with focus on CLE requirements and available technology. The economics of CLE are not uncomplicated; the reasons attorneys take CLE courses are diverse.

When I read the "Why did you take this course?" answers on my evaluations, it's not surprising to find that it's "To fulfill CLE requirements" as often as it is "To learn about the topic." (Of course, it's always gratifying to receive positive responses to the questions on the quality of the presentation and presenter, too!)

In addition to the enrollment cost of a course, there's the time involved as well. That's where the internet comes in. A lost hour of otherwise billable time can triple the out–of-pocket cost of an hour of CLE. No, it's not the hour of CLE time, it's the hour of travel to & from an educational venue.

The developing recognition of the value of a live & interactive CLE session conducted online makes this delivery system an ideal way to leverage time and cost for the attorneys.

I think this will be the wave of the future, as well as on-demand access to CLE programs where the "live & interactive" aspect is not a requirement. The ability to stream a broadcast without physically sending or returning DVDs, tapes, and so forth will eventually change the operation of the CLE business.

Couldn't agree with you more, Yan. In fact, voicing providers concerns about the accreditation process and mandatory CLE is an emerging area of advocacy for uMCLE. As an entrepreneur, how do you find a meaningful work/life balance?

I am fortunate to be able to balance my work and "non-work" life in an integrated fashion. Thanks to the ability to create and deliver my educational products and other professional services online, I am able to maintain a very flexible schedule and venue of operations.

My wife and I spend a major portion of the year at our horse ranch in central Arizona, where we raise and train and just enjoy being with the horses and staying close to the land.

I am communications-rich, with a full array of internet, cable, telephone, and other facilities. I participate in many online and live activities to keep current in the topics of interest in my consulting practice, and that lays the foundation for my CLE and other CE work.

In the course of a given day, I'm on the phone, at the computer, feeding and exercising horses (mucking stalls, too!), participating in neighborhood activities, and generally staying connected with the world out there.

We are in the process of building a new house here at the ranch — very green and energy-efficient. That has taken a lot of research and consultation, and it's fulfilling to be in the midst of a project that has the capacity to make our lives more sustainable and self-sufficient.

In other words, a renaissance man. Besides your time at the horse ranch, what do you do for fun?

I am reminded of a very old and now politically incorrect story about how to determine the difference between fun and work — but I am going to overcome the temptation to recount it.

We love to have company, cook meals from locally-grown sources, and share the joys of rural living. There is always lively conversation and an appreciation for the beauty of nature and our surroundings.

Although the work is never "done" — I do enjoy hearing (or saying) the words some time in late afternoon: "It's beer-thirty!"

Well, it's just about beer-thirty now, Yan. Thank you very much for taking some time out to have this conversation. I've enjoyed getting to know you. Best of luck in your CLE endeavors and the assuredly may others that you choose to engage. Let's chat later about that old story you mentioned.

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