

## The AI-Ready Lawyer: Innovation, Ethics, and the Future of Legal Services

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### California Minority Counsel Program

Date & Time: Wednesday, May 13, 2026; 12:00 pm - 1:15 pm

Title: The AI-Ready Lawyer: Innovation, Ethics, and the Future of Legal Services

#### Description:

The AI revolution has created unforeseen challenges for all legal professionals, and simultaneously birthed innovative tools that forever changed the way lawyers practice law. Law firms and inhouse departments must balance the convenience and speed of AI technology with their duties of candor and confidentiality. Our speakers will provide practical advice on selecting and using AI tools, note the ethical implications of misuse of AI work products, and share their views on how AI will impact the legal profession in the long run. Whether you are an inhouse or law firm lawyer, this session will help you gain key insights into choosing and using AI tools to help boost your career while protecting your clients for years to come.

#### Learning Objective:

- Identify practical uses of AI tools in legal practice and evaluate considerations for selecting and implementing those tools within legal organizations.
- Understand attorneys' ethical obligations relating to competence, confidentiality, supervision, and candor when using generative AI technologies.
- Recognize potential risks associated with AI-generated work product, including inaccuracies, confidentiality concerns, and improper reliance on automated outputs.
- Explore best practices for the responsible and effective use of AI tools in law firms and in-house legal departments.
- Discuss the evolving impact of AI technology on the legal profession and the future delivery of legal services.

Moderator: Ismael Bautista (Southern California Gas Company)

#### Speakers:

- Brett Durand (Sempra)
- Marjorie Soto-Garcia (McDermott Will Schulte)

- Stephanie Mercedes Tennant (Meta)

CA MCLE: .5 HR in Legal Ethics, .75 HR in Technology

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## SUBTOPIC 1 – PRACTICAL AI TOOLS

There are dozens of AI tools available in the market and it seems really challenging to discern which one is better for an organization's particular needs. There are simply too many to choose from.

- Are there some AI tools that your respective organizations have already adopted? If so, what was your organization's journey in evaluating and selecting those tools? Did factors such as budget and a tool's level of industry adoption influence your final selection?
- Once lawyers in your organizations started using those tools, what were some challenges that they encountered and what were some of the benefits they were able to materialize?
- Have you come across some lawyers who have told you that they will never use AI for their practice and why?

## SUBTOPIC 2 – ETHICAL CONSIDERATIONS

Let's talk about the ethical issues that come with using AI tools. ABA Model Rule 1.1 and corresponding state rules (e.g., California Rule 1.1) mandate that lawyers provide competent representation, defined as possessing the legal knowledge, skill, thoroughness, and preparation reasonably necessary for the matter. Competence includes staying abreast of changes in law and technology. Failure to act competently may involve intentional, reckless, or repeated negligence.<sup>1</sup>

One of the key benefits of using AI tools is that they are supposed to help lawyers become more efficient and effective with their time. A lawyer who is more productive and time-efficient typically translates into a client being charged less money for that lawyer's time, or that lawyer being able to spend more time on other matters within an organization, whether a company, nonprofit, or government entity.

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<sup>1</sup> See also CA Bar Guidelines on Using AI:  
<https://www.calbar.ca.gov/sites/default/files/portals/0/documents/ethics/Generative-AI-Practical-Guidance.pdf>.

However, we have all seen in the news several examples of lawyers who have either been reprimanded or disciplined by judges for their misuse of AI tools. Some lawyers have filed briefs riddled with citations to opinions that do not exist, and last year a couple of law firms were sanctioned \$31,000 by a California judge for doing this. Other lawyers have added confidential information into an AI tool that perhaps used that information to help train its models. The reputation of these lawyers and firms has been naturally affected by such misuse of AI tools.

- What are some examples of things that lawyers at your respective organizations can do with AI tools that do not raise any ethical concerns?
- What are some examples of things lawyers should not be doing with AI tools?
- What have your organizations done to help prevent lawyers from inadvertently using AI tools in a way that doesn't comply with their ethical obligations?

### SUBTOPIC 3 – FUTURE IMPACT OF AI TECHNOLOGY

No one doubts that AI has forever transformed the legal profession in ways that perhaps none of us anticipated when we started working in this industry. The current AI tools are able to do tasks that used to be considered science fiction, such as summarizing lengthy documents in seconds, conducting faster legal research, and drafting documents out of thin air. With the rapid pace of AI advancement, it has become increasingly challenging to anticipate the new frontiers the technology will reach next.

- Have your respective organizations considered offering employees any sort of training on the Dos and Don'ts of AI tools?
- How advanced do you think AI tools will become in the next 5 or 10 years?
- Do your organizations have concerns that some of the AI tools you are using today will become obsolete or superseded by other tools in the next few years so that you will have to restart the process of selecting and using new tools?

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### CITATIONS AND RESOURCES

California Rules of Professional Conduct:

- Rule 1.1 (Competence)
- Rule 1.6 (Confidential Information)
- Rule 5.1 (Responsibilities of Managerial and Supervisory Lawyers)
- Rule 5.3 (Responsibilities Regarding Nonlawyer Assistance)

ABA Model Rules / ABA Guidance:

- ABA Model Rule 1.1 Comment 8 (technology competence)
- ABA Formal Opinion 512 (Generative AI)
- ABA Formal Opinion 477R (cybersecurity and client communications)

Cases/sanctions involving AI hallucinations:

- *Mata v. Avianca, Inc.* (S.D.N.Y. 2023)
- *Lacey v. State Farm General Insurance Co.*, \_\_\_ F. Supp.3d \_\_\_, 2025 WL 1363069 (C.D. Ca. 2025)

Technology / governance resources:

- NIST AI Risk Management Framework
- Cal. Bus. & Prof. Code Sec. 6068

CA Bar Guidelines on Using AI:

<https://www.calbar.ca.gov/sites/default/files/portals/0/documents/ethics/Generative-AI-Practical-Guidance.pdf>