



# Bonds and Beverages Toolkit

— A resource guide for NABL members hosting law school events.

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## Overview

One of the most significant challenges faced within the field of public finance is the underrepresentation of early-career professionals. Public finance often receives inadequate attention in the standard law school curriculum. Bonds and Beverages is a new program designed by The National Association of Bond Lawyers (NABL) that endeavors to bridge this knowledge gap by providing complementary educational opportunities to law students across the United States.

This toolkit will help you focus on your goals, identify key logistics when facilitating an event, and provide you with samples of emails and SM posts to use in reaching out/promoting the event to a law school/student organization. If you have any questions or need additional information, reach out to NABL at [nabl@nabl.org](mailto:nabl@nabl.org).

## Goals

NABL's goals are to:

- (a) Encourage law students to pursue a career in public finance.
- (b) Educate current law students on the advantages of NABL's free student membership, and their membership as they enter their career in public finance.

## **Event Structure**

Each event will be hosted at a law school for about 90 minutes. The first half will provide speaker(s) with a chance to introduce students to public finance and the second half will include networking, food, and beverages.

## **Advice on Hosting a Bonds and Beverages Event**

When you are looking to host a Bonds and Beverages event at your alma mater or local law school, here's advice on how to time, plan the event, and sample emails and social media posts to help promote the event. We encourage you to engage your young associates to help plan the event. They can provide advice on food, social media messaging, and one can serve as a panelist. They can discuss how they entered public finance and advice on how to enter the industry after law school.

## **Timing of the Event**

- 1.) When you want to host an event, reach out to the law school career center or former professors two or three months before the event.
- 2.) Host the event on campus during lunch or early evening timeframe, depending on what works best for the law school and its students. The career center may provide insight regarding when to host the event.

## **Event Planning Schedule**

- 1.) Select a date for the event.
- 2.) Create a list of people/organizations you want to reach out to about the event. The list should include the career center, student government, and clubs that are related to public finance including: tax and securities groups, Business Law, Banking and Securities, Real Estate, Environmental and Energy Law.
- 3.) Send out two or three emails each month leading up to the event. Make the copy fun, short, and include headshots and names of the speakers. In your student outreach, you can include a short note about networking with speakers and learn more about clerkships with the firms. In addition, encourage students to bring a copy of their resume. Sample emails are included later in the toolkit.
- 4.) Create social media posts for the event and share them on LinkedIn (LI) and tag the law schools and law firms of speakers. Make the posts fun and creative, so it catches students attention. Sample posts are included later in the toolkit. Contact our team to support you with graphic design.
- 5.) If you would like to give out NABL swag (Bond Basics, NABL stickers and other items), reach out to NABL three weeks before the event and let us know how many people will attend. We'll mail out a package to you.

- 6.) For food and beverages, we would recommend sandwiches/pizza or other local items for lunch or dinner and providing water/sodas at lunch and offer alcoholic drinks at the evening event, if you are allowed to at the law school. In the event alcoholic beverages are not permitted, or you elect not to provide any, we suggest using the title “Bonds and Bites.”

### **Outline for the Program**

- 1.) For the event, in addition to bond counsel, we encourage you to have a panel with tax and securities lawyers as well as an issuer or issuer’s counsel, so you can show different aspects of a deal and opportunities available for the students in law school.
- 2.) Host a planning call with the panelists two or three weeks before the event.
- 3.) During the event, keep the presentation casual without a PPT presentation and engage the students with questions.

### **Day of Event Activities/Logistics**

- a.) Take photos of the panel and networking and send photos to Kiyan Pirgheybi at [kpirgheybi@nabl.org](mailto:kpirgheybi@nabl.org). Include a short caption with a list of names, and we’ll create a LI post promoting the event.
- b.) Show a QR code or a share a link for students to sign-up as members- <https://www.nabl.org/join/#students>
- c.) Encourage students to join NABL for free and apply for the Frederic L. Ballard Jr. Memorial Scholarship (starts in late January and application deadline is early March)
- d.) Encourage students to post on LinkedIn about attending the event and tag us on LinkedIn (<https://www.linkedin.com/company/national-association-of-bond-lawyers/>)
- e.) At the end of the event, share feedback about the event and the attendance list with NABL. Email us at [nabl@nabl.org](mailto:nabl@nabl.org).
- f.) Send out a short survey (sample questions are included at the end) to the students who attend.

## Event Outline for Panelists and NABL Sample Script

### National Association of Bond Lawyers (NABL) Traveling Seminar Series

#### Outline – Content/Talking Points

1. Room set up advice: the desired panel of speakers will consist of 5-7 persons (see 2. below). If attendees number 10 or less, consider pulling chairs into a circle for a small group discussion format rather than podium or table type speaking.
  
2. Panelists should consist of a moderator and the following persons, if possible:
  - Board Director/Officer of NABL;
  
  - Chief Operating Officer, Director of Governmental Affairs and other NABL Office representative;
  
  - Bond counsel type to cover “Bond” basics (“what is a bond”);
  
  - Underwriter’s/securities law type to cover how municipalities, issuers, access the capital markets;
  
  - Tax lawyer type to mention generally the special rules that are Sections 103 and 141-150, regulations, letter rulings;
  
  - An in-house issuer lawyer or finance director to discuss how he or she manages bond counsel, underwriters, tax complexities when undertaking a bond issue.

Do an informal introduction of the foregoing persons, emphasizing (a) the collegial nature of our public finance practice niche, (b) the support that the NABL Board and Staff provide to all practitioners and (c) the professional and personal friendships that are evident among the panelists (“through our practices and our professional association, we know each other well”);

3. Initial “thank you”s, “welcome”s, etc. and mentioning that this Traveling Seminar Series is something very exciting to the organization, etc. Emphasize

to law students that we appreciate how their time is at a premium, and we are grateful for the time they are spending with us to learn about our unique practice field.

4. Who we are (NABL Officer/Director): Introduction of NABL as an organization (brief).
  - a. NABL's membership consists of individual lawyers (as opposed to law firms).
    - i. As of February 6, 2024, NABL's membership stood at 2,367 members.
    - ii. NABL draws members from all 50 states.
  - b. Could mention, e.g., ABA (since all law students know what the ABA is).
    - i. NABL is a more specialized bar association.
  - c. Mention several aspects of NABL's mission and overarching purposes.
    - i. Educating the bond community. Describe Essentials, Institute, Workshop and how these events offer not just CLE, but networking with fellow members from all 50 states and with other industry participants
    - ii. Elevating the level of practice. Publications, comment letters, news alerts. Emphasize the important work of the Director of Governmental Affairs.
    - iii. Improving the quality of the municipal bond industry. As a NABL member, you will get the opportunity to work with members of the GFOA, NFMA, NAST, SIFMA, etc. organizations on conferences and comment projects.
5. Introduction of the panelists.
  - a. Name, position, firm, city/state, how long that attorney has practiced in the municipal finance area.
  - b. Each person to introduce himself/herself. Have each briefly name their favorite public finance/bond issue project that they have worked on. (See 8. below).
6. Maybe ask a couple of questions (related to the students' coursework) to break the ice, e.g. (with a lead-in of "by a show of hands"):
  - a. How many of you have taken a course in corporate finance?

- i. Could back up and start with “how many of you have taken a course in corporate law?”
  - b. How many of you have taken a course in securities law?
  - c. How many of you have taken a course in state and local government?
  - d. In schools where offered, “How many of you have taken a course in municipal finance?”
  - e. What piqued your interest in coming today/this evening?
7. Overview of nation’s infrastructure – that so much of it is financed at the state and local level. (“When you were growing up in your local community, how many of you saw a new school being built or a bridge being repaired? That is the type of work we do behind the scenes as public finance lawyers.”) Include some of the following notions:
  - a. States, counties, and cities – and even school districts – just like private corporations, have to borrow in some fashion to finance their physical infrastructure (capital projects).
    - i. Their normal year-to-year operating budgets typically don’t provide funds for other than perhaps the smallest capital projects.
    - ii. Common examples: States finance their roads, bridges, and tunnels; cities and counties finance their streets and roads, water supply systems, wastewater (sewage) disposal systems, a new City Hall, a new county administration building, electric generation, transmission, or distribution facilities (“public power”), including renewable energy (e.g., solar, wind).
      1. School districts finance the new elementary school, or new high school that’s needed to accommodate the community, or to replace old and outdated structures.
      2. Even certain nonprofit organizations “get into the act” – financing hospitals, colleges and universities, cultural institutions (museums or the new symphony hall) or even the local YMCA.
      3. The list goes on – and even encourage input from attendees on things that may be financed.
8. “Favorite” (or most enjoyable, or choose other adjective) project that each of the panelists has worked on and what has made it special.



9. The many roles of counsel in public finance (give brief description; have each designated panelist cover their type of counsel role. Have the issuer representative, counsel, or finance, emphasize how they assemble and manage a team to undertake a bond issue – it is transactional teamwork rather than litigation adversarial work):
  - a. Bond counsel – what is a “bond.” What is a bond opinion. State constitution, state law, local law. As a relatable example, mention Dillon’s Rule as a key to analysis in many states; Dillon’s Rule is a frequent question on bar exams. A very “public” kind of law practice.
  - b. Underwriter’s counsel – underwriters and banks help cities and other governmental issuers access the capital markets. Issuers offer bonds pursuant to disclosure documents, both initially and continuing.
  - c. Disclosure counsel helps with offering documents
  - d. Bank (credit enhancer) counsel (variable rate deals)
  - e. Purchaser’s/lender’s counsel (private purchase/lending)
  - f. Trustee’s counsel
  - g. Issuer’s counsel
    - i. Conduit financings
    - ii. Non-bond counsel document of state law work on both conduit and non-conduit financings
  - h. In-house issuer’s counsel position
  - i. Borrower’s counsel (conduit financings)
    - i. 501(c)(3) counsel
10. Conclusion: as you can see, we panelists know each other well through the client work we have done together and through the NABL activities we participate in. This is a collegial and supportive practice area with invigorating public project financings to delve into. As working groups, you get to see real results of your lawyering: public parks and venues, housing projects, schools, etc.

## Sample Materials for Bonds and Beverages Events

### Survey for Attendees

1. How would you rate the overall quality of the Bonds and Beverages event?  
(Not Satisfied to Very Satisfied)
2. How would you rate the following aspects of the event?
  - a. The panel of speakers (scale of 1-5 with 5 being the highest)
  - b. Networking Time (scale of 1-5 with 5 being the highest)
3. What did you like best about the event? (open-ended)
4. How much did you increase your knowledge about public finance? (Scale of 1-5)
5. How did the Bonds & Beverages event impact your thoughts about the field of public finance? (open ended)
6. How did you hear about this event? (marketing email, flyer from school, social media, word of mouth, and other)
7. Are you planning to apply for the Frederic L. Ballard Scholarship for a chance to attend The Essentials conference? (yes/no)
8. After attending the event, are you planning to join NABL? (yes/no)
9. Would you recommend other law students to attend future events like this one?
10. Please share any additional thoughts or feedback.

## Sample Emails for Outreach

### Invite email to host event at a law school

Dear [Dean of law school or Career Center]

My name is (insert name), and I'm an attorney with (law firm). I am a lawyer in the public finance industry, which is a niche part of the bar. I am developing a program called Bonds & Beverages for law students. It's a 90-minute program that will introduce law school students to public finance and provide an opportunity to network with lawyers from top law firms in the (insert city or area). **It's a free event, and I wanted to see if we could host it on the law school campus.**

We are aiming to host the event on [date and time] and provide food and beverages for the event. Let me know if it would be possible to host the event at [law school]. This will be a great opportunity for the students to network with professionals in the field and learn more about a career choice after law school.

If you aren't the right person, please let me know who I should reach out to about this event. Thank you in advance for your advice and consideration.

Sincerely,

(name)

### Email to invite students to the event (student government/club at the law school)

My name is (insert name), and I'm an attorney with (law firm). We are hosting an event called Bonds & Beverages, which will provide law school students with an opportunity to gain knowledge about the public finance industry. The event includes a short panel discussing public finance followed by networking with lawyers from top firms in the area. **It's a free event that will provide food and beverages to anyone who attends.**

The event will be (time, date, and location), and this will be a great opportunity for the students to network with practicing attorneys. I wanted to see if you could share this information with other law students. I've attached an image of the panelists and a short description of the panel. (Include the lawyers and a fun project that people in the area will recognize as a starting point to discuss the industry.)

Thank you in advance for your consideration, and I hope to see you there!

Sincerely,

Name

## **Confirmation email to those who register for the event**

Thank you for registering for Bonds & Beverages event on (DATE and TIME). We are looking forward to welcoming you. I wanted to share directions on how to get to (location). (Directions here.)

Please bring a copy of your CV to share with the speakers. The event will start promptly at (TIME) with a short panel discussion with networking following the discussion. We will have light food and beverages available for guests.

On the day of the event, if you need to reach me, please contact me at (insert info).

Looking forward to seeing you on (date).

Sincerely,

NAME

## Sample SM posts

Here's a sample LI post NABL created for the Chicago event in March. It's important to tag schools in the area because they will hopefully amplify the post to their followers. Our team can support you by creating unique graphics for your event along with suggested captions. Reach out to Kiyon Pirgheybi and he will be happy to help.

Chicago-Area Law Students: Interested in infrastructure and public finance? Join [David Fernandez](#), [Sarah Breitmeyer](#), and [Latasha R. Thomas](#) on March 3 at 5:15pm for a networking event to learn more about how the \$4 trillion municipal market finances critical infrastructure in Chicago. Student attendees will also have a chance to win a \$100 gift card drawing. Learn more and register today:

<https://lnkd.in/gFG3fCT>

[Northwestern University Pritzker School of Law](#) [University of Chicago Law School](#) [Loyola University Chicago School of Law](#) [DePaul University College of Law](#) [Chicago-Kent College of Law](#), [Illinois Institute of Technology Chicago Kent College of Law](#) [University of Illinois Chicago](#)

**Bonds & Beverages: Chicago**

Network with **top lawyers** from more than 15 different firms across the country!

**Sarah Breitmeyer**  
Chapman and Culter LLP  
Chicago, IL

**David J. Fernandez**  
Ballard Spahr  
New York, NY

**Latasha R. Thomas**  
Clark Hill  
Chicago, IL

Here's the copy for LI post regarding the February event in DC.

Calling all D.C. area law students interested in infrastructure and public finance — join [Andrew Kintzinger](#) [Brian Garzione](#) [Erin K. Law](#) and Keirston R. Woods on February 22 at 6pm for a networking event and to learn more about how the \$4 trillion municipal market finances critical infrastructure in the DMV. Learn more and register today [www.nabl.org/DCstudents](http://www.nabl.org/DCstudents) [American University Washington College of Law](#), [University of the District of Columbia David A. Clarke School of Law \(UDC Law\)](#), [The George Washington University Law School](#), [Georgetown University Law Center](#), [Howard University School of Law](#)

**Bonds & Beverages: DC**  
Free networking event with  
top lawyers in the DC-Area!

**Brian Garzione**  
Hawkins Delafield & Wood LLP

**Andrew R. Kintzinger**  
Hunton Andrews Kurth LLP

**Erin K. Law**  
Office of the Chief Financial Officer,  
Government of the District of Columbia

**Keirston R. Woods**  
Bryant Miller Olive P.A.

# Bonds & Beverages: DC

Free networking event with  
top lawyers in the DC-Area!

Learn about the new potential Professional Sports Complex  
in Alexandria and how you could play a role in a future project!



**Brian Garzione**  
Hawkins Delafield & Wood LLP



**Andrew R. Kintzinger**  
Hunton Andrews Kurth LLP



**Erin K. Law**  
Office of the Chief Financial Officer,  
Government of the District of Columbia



**Keirston R. Woods**  
Bryant Miller Olive P.A.

Join the **National Association of Bond Lawyers** for this event and learn more  
about public finance. Attendees will be entered into a raffle for **\$100 gift card**.

FREE FOOD, BEVERAGES & NETWORKING

**RSVP BY FEBRUARY 20**

Visit [nabl.org](http://nabl.org) or email [nabl@nabl.org](mailto:nabl@nabl.org) to learn more and RSVP



*Thank you to Hunton Andrews Kurth LLP for hosting our event.*



## Sample Flyer for an event

## Sample Thank You email or card to panelists

Dear (name):

Thank you for servin13g on the panel last night at (law school). I appreciate you taking time to give advice to law school students and talk about the work you do in the field. (insert a sentence or two of something you want to highlight). Hopefully, we inspired future students to enter the public finance profession after last night's event.

Thanks,

(Name)

## **NABL Members & Staff**

If you need advice or have questions about hosting your own event, please reach out to the NABL members and staff who put together the Bonds & Beverages event.

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