

*THE
ILLINOIS PARALEGAL ASSOCIATION
PRESENTS ITS 2009 SPRING EDUCATION CONFERENCE*



***PARALEGALS IN PURSUIT OF
EXCELLENCE***

*MAY 14, 2009
UNION LEAGUE CLUB OF CHICAGO*

EDUCATION SEMINAR TOPICS

Thursday, May 14, 2009

9:00 a.m. – 10:15 a.m.

The ADA Amendments Act: This Act went into effect on January 1, 2009. This important law expands the number of people with disabilities whose rights will be protected by the ADA. At this presentation you will learn how people with disabilities can benefit from the law and how businesses can comply with the Amendments Act. *Alan Goldstein, Senior Attorney, Equip for Equality.*

PowerPoint Best Practices for Paralegals: Join Trish for a basic, yet comprehensive, session demonstrating the power and utility of Microsoft's PowerPoint software in paralegal applications. Master PowerPoint basics, understand the various paralegal uses of the software, and learn how to create an actual presentation using a number of the application's features. The techniques explored in this session are appropriate to all paralegals, regardless of practice area. *Trish Uhl, PMP, CPLP, Owl's Ledge LLC.*

Estate Planning for the Elderly: When you are working with our increasing elder population, it is vital to know the fundamentals of the legal and financial issues that may arise. Handle these matters with confidence and compassion and learn how to draft an estate plan, protect important assets and understand the issues what constitutes probate and non-probate assets and the estate and gift tax issues that surround such planning. *Joel Goldblatt, Attorney, Childress Duffy Goldblatt Ltd.*

UCC Filing Under Revised Article 9: Filing a UCC1 financing statement is the most common way to perfect a security interest under UCC Article 9. However, without a properly completed and filed UCC1 financing statement and subsequent UCC3 amendments, if applicable, a secured lender will not have priority against competing claims for its collateral which, in the event of bankruptcy of the debtor, could produce disastrous results. This session is a practical look how UCC forms need to be completed to meet statutory and filing office requirements. It also touches on the search process and covers pitfalls and lessons to be learned from common filing mistakes. *Clare Oliva, Vice President, National Corporate Research, Ltd.*

SEC Electronic Filing of Form D: In this session, we will discuss the issues in connection with the new electronic Form D, the related regulations, and state compliance. *Carmen A. Gaspero, Attorney, Katten Muchin Rosenman LLP.*

PACE Study Review – 4th in Series – Intellectual Property General Overview: Test your knowledge in this 4th study session for NFPA's Paralegal Advanced Competency Exam. We will review the types of Intellectual Property, basic principles and procedures highlighted from the PACE Study Manual. *Irina V. Frye, RP, Paralegal, Dykema Gossett.*

10:45 a.m. – 12:00 p.m.

Family Medical Leave Act: The Family Medical Leave Act can leave you confused and frustrated. In this session, we will untangle the web of information and navigate through the complex FMLA regulations. Come hear about the latest updates on recent 2008 Amendments and what they mean to make sure you stay in compliance and know your obligations. *David Lee, Attorney, Law Offices of David Lee.*

Researching Judges, Arbitrators & Opposing Counsel: This seminar identifies and discusses the resources involved in researching and understanding the background and experience of the judge or arbitrator who will be hearing your case, or the attorney your client will be facing in court. *Susane Yesnick, Head Research Librarian – Chicago, Drinker Biddle & Reath.*

Special Needs Trusts For Disabled Beneficiaries – a General Overview: Special needs trusts are used to protect income and/or assets for disabled individuals who need to qualify for means-tested governmental benefits. This session will explain what distinguishes "special needs" trusts from "support" trusts and how "special" provisions governing trust goals and trustee powers affect the administration of these trusts. *D. Rebecca Mitchell, Attorney at Law.*

Planes, Trains and Automobiles: Certain types of collateral are exempt from the filing provisions of Article 9. Collateral such as aircraft, titled vehicles or intellectual property may require perfection under some other law, statute or treaty. Lenders and legal professionals must be aware of when a financing statement alone might be insufficient to perfect a security interest. This presentation identifies collateral types that require special attention, explains the necessary perfection steps and provides tips for minimizing risks during the perfection process. *Paul Hodnefield, Associate General Counsel, Corporation Service Company.*

The Paralegal Project Management Toolkit: Attendees participate in this highly interactive scenario-based session by immersion into an actual project. Through experiential learning, attendees discover effective stakeholder communication, task planning, and project estimation techniques. Participants will also leave the workshop with checklists and templates they can use immediately to better scope projects in today's fast-paced legal environments. This session is appropriate for all paralegals, regardless of experience or practice area. *Trish Uhl, PMP, CPLP, Owl's Ledge LLC.*

Federal Rules of Civil Procedure: This seminar will guide you through the Federal Rules of Civil Procedure from a paralegal perspective. Learn to be proactive in a federal matter from preparing the complaint, completing proper service, working with the client in preparing discovery, interviewing witnesses and getting ready for trial. *Caren Mansfield, CLA, Paralegal, Baker, Baker & Krajewski LLC.*

1:30 p.m. – 2:45 p.m.

Repricing Underwater Stock Options - Reviving an Employee Incentive: Stock options were once the carrots that attracted, and retained, talented employees. But what happens when those options go "underwater," or the stock becomes worth less than the option price? The incentive is gone. This seminar will address how companies can deal with the problem of underwater stock options and some possible solutions to revive this incentive. *Francisco Connell, Querrey & Harrow, Ltd.*

Ethics in Electronic Discovery: Ethics in electronic discovery is quickly becoming one of the most important issues today. Beyond just "doing the right thing", there are specific duties and requirements that legal professionals need to be aware of to avoid sanctions, penalties, and to comply with their ethical and legal responsibilities. This session will prepare you by examining the newest case law and hot topics related to ethics including new Rule 502, recent judges' opinions on collaboration and FRCP 26(g), the Zubulake duties, and more. Recent decisions have underscored the importance of these duties...and judges' reactions to those who ignore them. If you're involved with litigation at a law firm or corporate legal department, this is one seminar you don't want to miss! *Doug Kaminski, OCE Business Services, Inc.*

Medical Malpractice: This seminar will address how the paralegal may assist in the handling of medical malpractice cases, from the initial interviews through trial. Both sides of this litigation, plaintiff

SEMINAR REGISTRATION FORM

Thursday, May 14, 2009

9:00 a.m. – 10:15 a.m.	10:45 a.m. – 12:00 p.m.	1:30 p.m. – 2:45 p.m.	3:15 p.m. – 4:30 p.m.
The ADA Amendments Act	Family Medical Leave Act	Repricing Underwater Stock Options - Reviving an Employee Incentive	SEC Proposed Replacement to U.S. GAAP with International Financial Reporting Standards (IFRS)
PowerPoint Best Practices for Paralegals	Researching Judges, Arbitrators & Opposing Counsel	Ethics in Electronic Discovery	Avoiding the Battle of Trial – Alternative Dispute Resolution
Estate Planning for the Elderly	Special Needs Trusts for Disabled Beneficiaries – a General Overview	Medical Malpractice	Top 10 Ways to Pay More Than You Should for a Claim in Illinois
UCC Filing Under Revised Article 9	Planes, Trains and Automobiles	Practice at the Illinois Workers' Compensation Commission – the Employer's Perspective	Excel-erate Your Workday – Excel Tips and Trade Secrets for Today's Paralegal
SEC Electronic Filing of Form D	The Paralegal Project Management Toolkit	1031 Tax Deferred Exchanges	Title and Survey Review
4 th in Series of PACE Study Review – Intellectual Property General Overview	Federal Rules of Civil Procedure	Law Office Management	Ethics - Pushing the Envelope

Circle the education session(s) which you will be attending

We cannot always control the air temperature in the classrooms. Therefore, please come prepared by dressing in layers. Proper dress is required in the Union League Club. Please visit the IPA website for dress code restrictions, parking and transportation information, and directions to the Club. The IPA is a guest at the Union League Club, and, therefore, can make no exceptions to the Union League Club's dress code.

Registration Information

The seminars will be held at **The Union League Club of Chicago**, 65 W. Jackson Boulevard, Chicago. The registration fees for the Education Sessions include handout materials and breaks. **Lunch is included for those attending four consecutive classes.**

Copy this form for additional registrations, as needed.

A \$20 late fee for rush handling is assessed after May 8, 2009. A full refund is available for a written cancellation received by May 8, 2009. Substitutions of registrants will be permitted.

Tax deductions: An income tax deduction may be allowed for expenses of education undertaken to maintain and improve professional skills. See your tax advisor.

Make checks payable to: Illinois Paralegal Association or charge to your Visa, MasterCard or American Express.

If you would like to receive a confirmation of registration, include your email address.

Name _____

Firm _____

Address _____

City, State, Zip _____

Telephone _____

E-mail address _____

Registration Fees		
	Member	Non-Member
One day	\$175	\$225
Half-day	\$125	\$150
Quarter-day	\$75	\$100
Lunch	\$25	\$30
Late fee (after May 8)	\$20	\$20

Circle the price for the events you will be attending

Lunch	
If you are attending the Lunch, please select an entrée. Lunch is included with a full day of seminars.	
<input type="checkbox"/>	Parmesan Crusted Breast of Chicken with Lemon Herb Essence
<input type="checkbox"/>	Atlantic Coast Salmon with Soy Ginger Glaze

For Credit Card Registrations, Fax Your Registrations to 815/462-4696					
<input type="checkbox"/>	Visa	<input type="checkbox"/>	MasterCard	<input type="checkbox"/>	American Express
Name on card _____		Expiration _____			
Card Number _____					
Signature _____					

Mail Registration Form and check to:
Illinois Paralegal Association
Post Office Box 452 • New Lenox, Illinois 60451-0452

or register online at www.ipaonline.org

EDUCATION SEMINAR TOPICS

Thursday, May 14, 2009

and defense, will be addressed. *Mary Kay Lieberman, RP, MK Paralegal Services.*

Practice at The Illinois Workers' Compensation Commission - the Employer's Perspective: This seminar will involve what takes place when a workers' compensation case is filed, how cases are valued and what employers can do to limit case exposure. *Andrew Makauskas, Attorney, Brady, Connolly & Masuda, P.C.*

1031 Tax Deferred Exchanges: This session will focus on forward, reverse and improvement (build-to-suit or construction) tax-deferred, like-kind exchange transactions pursuant to Section 1031 of the Internal Revenue Code as it relates to real estate. The session will begin with an introduction to the steps required to reach a successful 1031 exchange outcome. The discussion will focus on the structures, processes, strategies, and compliance issues necessary to successfully complete a 1031 exchange transaction. *Coleen Danaher, NES Exchange.*

Law Office Management: If you are a student wondering what it is like to work in a law firm, this session is for you. It is designed to familiarize current and future paralegals with the practical inner workings of a law office including understanding law office procedures. We will discuss the fundamentals of law office management, including such items as billable hours, legal fees, trust accounts, ethics, client relations, the legal team, technology and more. *Sharon Patterson, Legal Assistant Supervisor, Goldberg Kohn.*

3:15 p.m. – 4:30 p.m.

SEC Proposed Replacement to U.S. GAAP with International Financial Reporting Standards (IFRS): In August 2008, the SEC proposed a "roadmap" that could lead to all U.S. public companies using International Financial Reporting Standards (IFRS) in their SEC filings, superseding U.S. Generally Accepted Accounting Principles (GAAP). This session will review the status of the ongoing move to IFRS, highlight key differences from U.S. GAAP, and suggest specific transactional and litigation settings where these developments are expected to have significant impact. *Elizabeth A. Kowalski, CPA, CFE, Manager, Litigation and Forensic Accounting, Russell Novak & Company, LLP.*

Avoiding the Battle of Trial - Alternative Dispute Resolution: Presentation will discuss the various methods of resolving civil controversies through alternative dispute resolution, including the advantages and disadvantages of the various different methods. *Todd Heller, Attorney, Heller Ehrman, LLP.*

Top 10 Ways to Pay More Than You Should for a Claim In Illinois: The rules regarding how an insurance claim should be handled are well known, but they are often forgotten by people handling the claims. When these rules are broken, the insurer can find itself paying more than would be called for under its policy, because it waives its coverage defenses or it commits bad faith. This discussion will focus on ten common mistakes that can lead to paying more than the insurer has agreed to pay under its policy. *William K. McVisk, Attorney, Johnson & Bell, LTD.*

Excel-erate Your Workday - Excel Tips and Trade Secrets for Today's Paralegal: This session will demonstrate how MS Excel can expedite day-to-day tasks for the modern paralegal. You will learn how to manage index files, create and format privileged logs, adjust print settings, filtering, working with formulas and much more. Multiple skills will be addressed while demonstrating each real world task. *Jeremy Schaper, BlueStar Computer Solutions, Inc.*

Title and Survey Review: What is title and survey? Why are they important in a real estate transaction? This session will answer those questions as well as give you practical tips on what to look for when reviewing title and survey. *Jeffery D. Hoffenberg, Attorney, Goldberg Kohn.*

Ethics – Pushing the Envelope: This seminar will give you up-to-date status on paralegals and the unauthorized practice of law, how to avoid it, and how we can be certain that our profession continues to move forward in allowing our work assignments to be more substantive. *Mary Kay Lieberman, RP, MK Paralegal Services.*

SCHEDULE

Thursday, May 14

8:00 a.m.	Registration begins
8:00 a.m. – 6:00 p.m.	Exhibits open
9:00 a.m. – 10:15 a.m.	Morning Session
10:15 a.m. – 10:45 a.m.	Break (2 nd Floor)
10:45 a.m. – 12:00 p.m.	Morning Session
12:00 p.m. – 1:30 p.m.	Lunch
12:30 p.m. – 1:00 p.m.	Speaker
1:30 p.m. – 2:45 p.m.	Afternoon Session
2:45 p.m. – 3:15 p.m.	Break (2 nd Floor)
3:15 p.m. – 4:30 p.m.	Afternoon Session

Thursday, May 14, 2009

LUNCH

State of the Market

Join us for an encore presentation by Derrick Brummel, Director of Legal Placement of Hudson Legal. Derrick will be discussing the skills that every paralegal needs to know to stay competitive in a tough market.

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Don't miss out:

*Join us for our Annual Spring
Education Conference on
May 14, 2009*

DO NOT IGNORE THIS BROCHURE.

Programs and instructors are subject to change without notice.