

*THE
ILLINOIS PARALEGAL ASSOCIATION
PRESENTS ITS 2010 FALL EDUCATION CONFERENCE*

Best Practice Playbook:



Paralegal Strategies To Get In The Game

*NOVEMBER 4, 2010
UNION LEAGUE CLUB OF CHICAGO*

8:30 am – 9:45 am

Corporate Business Filings: The Illinois Secretary of State's Department of Business Services serves as an approval and record-keeping office for limited liability companies and corporations. Attend this session to obtain information on corporation and LLC documentation, including a detailed view of how the Department reviews documents submitted for filing, and some common points of rejection. Information will also be provided on new services offered by the Department, i.e. low-profit limited liability companies, which became effective January 1, 2010. *Michael E. Jezierski, Administrator, Illinois Secretary of State, Chicago Office - Business Services Department.*

Computer Forensics 101: This presentation provides a solid explanation of how forensic data imaging is conducted, what kind of electronic evidence should be sought, and which discovery strategies will help litigators and their clients win before the bench. *Chad Gough, 4Discovery.*

Introduction to Summation iBlaze: In this beginner class, we will learn what iBlaze is, get a CaseExplorer overview and work with layouts. This session will be beneficial to anyone interested in learning how to be proficient with the basic CT Summation operations. *Tisha Delgado, Paralegal/Litigation Support Specialist, Rosen Technology Resources, Inc.*

The Implications of Managing Personal Health Information (PHI) Within Litigation: During the past 100 years, we have witnessed significant advancements in healthcare delivery systems. As the market evolves and new standards for building and utilizing electronic health systems emerge, attorneys need to understand these standards to effectively analyze data. This course will explore the emergence of eHealth and its impact on the legal world. It will teach you the proper techniques when requesting medical records and bills including step-by-step action items and how to overcome pitfalls and roadblocks. The application of HIPAA and Medical records requests will also be discussed. *Rebecca S. Busch RN, MBA, CCM, CBM, CPC, CHS-III, CFE, FIALCP, FHFMA; President & CEO of Medical Business Associates, Inc.*

Legal Research: An attorney's decision to take on a case can depend on the answers to legal issues he or she has identified. In this session, we will learn how to read cases so that you get the most out of them. We will also include an introductory discussion on researching and navigating through federal and Illinois agency rules and regulations to help you obtain relevant information to support your position. Conducting comprehensive legal research can help you to be the most effective advocate for your client. *Ryan A. Haas, Esq., Attorney, Chuhak & Tecson, P.C.*

10:15 am – 11:30 am

Nuts and Bolts of Forming an Illinois Not-For-Profit Corporation and Qualifying it as a 501(c)(3) Organization: Most people who want to create a nonprofit corporation also want to obtain recognition of exemption from income taxes under Section 501(c)(3) of the Internal Revenue Service Code. There are many steps that must be followed to get this tax-exempt status. Attend this seminar to learn the legal process of creating an Illinois not-for-profit corporation, obtaining a federal employer identification number, applying to the IRS for income tax exemption and registering with the Attorney General Charitable Trust Bureau. *Howard Rosenberg, Paralegal, Mayer Brown LLP.*

eDiscovery for Paralegals: Much of litigation practice today involves the process of discovery. The discovery stage often determines the outcome of the case, driving the parties towards settlement or trial. Developments such as the explosion of electronic discovery and document review tools, methods and

techniques have greatly affected the discovery process. Paralegals and Legal Assistants – the “case managers” during discovery – are perhaps the people most dramatically impacted by these changes. This session provides an update for paralegals to adapt to these changes and effectively and efficiently manage eDiscovery. The session will trace the steps in the discovery process, from preserving evidence to review and production, providing basic information and tips for the most effective strategy in different situations. Real-life examples will be used to illustrate these concepts as well as practical pointers for navigating the eDiscovery landscape including exploration of the 7th Circuit's eDiscovery Pilot Program. Join us for an insightful analysis of eDiscovery intricacies and management strategies. *Jay C. Carle, Attorney, Seyfarth Shaw.*

Hindsight and Probable Cause: In this session we will discuss constitutional criminal procedure and how hindsight about an individual's guilt or innocence may affect how the Courts of Appeal interpret constitutional rights. We will discuss the 2004 sexual assault and murder of three year-old Riley Fox and the subsequent arrest and release of Kevin Fox, her father. *Jade R. Lambert, Attorney, Perkins Coie.*

Deed in Lieu of Foreclosure: Malls, Hotels, Residences at every glance are entering foreclosure. The number of late payments and defaults are at a record pace. What happens when the Lender and Borrower cannot restructure debt repayment? What happens when there is no equity in the home, mall or hotel being foreclosure? Confronted with imminent foreclosure, the Lender faces attorneys' fees, court fees, court time and procedures, service and publication fees, possible delays due to Bankruptcy filings and redemption periods. The Borrower faces the reality of losing title to the property and a possible deficiency judgment. An alternative to Judicial Foreclosure is obtaining a Deed in Lieu of Foreclosure. A deed from the Borrower conveying the property in default to the Lender. The Lender is relieved of the time and cost of Judicial Foreclosure and the Borrower is relieved of personal liability for a deficiency judgment. Melissa will discuss the required procedures and provisions which must be followed in order to obtain an insurable Deed in Lieu of Foreclosure. *Melissa Roth, Office Counsel, Chicago Commercial Center, Chicago Title Insurance Company.*

Legal Writing: A memorandum to your attorney detailing definitions of basic legal concepts would be an annoyance. However, to exclude these concepts in a letter to a client with no legal background could be frustrating and/or confusing. Join us to obtain some tips and tricks on plain vs. formal language, and how to write effectively while being sensitive to the needs, level of interest, and background of the recipient. *William D. Goren, J.D., LL.M., Instructor and Paralegal Program Coordinator, ADA Instructional Coordinator, South Suburban College.*

1:30 pm – 2:45 pm

Best Practices for In-House Paralegals: Many tasks that are done by junior associates in large law firms can be done for small in-house groups by the paralegal. Learn how to become an invaluable and integral member of the legal team, working closely with in-house counsel. This session will include recommendations that stress extreme flexibility and nimbleness in deciding the "wants" and "needs" of the general counsel and in fulfilling them. *Blake Thatcher, Vice President and General Counsel, Omron Management Center of America, Inc.*

Ethical Issues in Electronic Discovery: Early cooperation and collaboration with the other side will help you, and your client, obtain a just, speedy, and inexpensive resolution of your case. Learn how to balance your costs, risks and ethical obligations during e-

REGISTRATION FORM

Best Practice Playbook – Paralegal Strategies To Get In The Game

November 4, 2010

The Union League Club of Chicago

65 W. Jackson Blvd.

Chicago, Illinois

Visit the website of The Union League Club for information on the required dress code <http://www.ulcc.org/about/dresscode.asp>

Please consider the environment and assist the IPA in going green by registering online at www.ipaonline.org. You may also mail the registration form and payment to the Illinois Paralegal Association, P.O. Box 452, New Lenox, Illinois 60451-0452. If you would like to receive a confirmation of your registration, please include your email address. Exhibitors and Sponsors will be provided with names/addresses/email addresses of all registrants. We cannot always control the air temperature in the classrooms. Therefore, please come prepared by dressing in layers. Proper dress is required by 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: Mailed registration forms must be postmarked on or before October 4, 2010 to qualify for the Early-Bird rate. The Early-Bird registration rate is only available to Full Day and Half Day participants. After October 4, 2010, regular rates apply. Registration fee includes attendance, handout materials, and breaks. Lunch is included for those registrants attending a full day of seminars

Cancellations and Substitutions: A full refund is available upon receipt of written request received by October 29, 2010. Substitution of registrants is 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 for more information.

CLE Info: This activity has been approved for Continuing Legal Education credit by the National Federation of Paralegal Associations.

Please list me as follows in the conference’s “Directory of Participants”: (Type or Print Clearly)

Name: _____ Firm/Organization _____

Address: _____ City, State, Zip Code _____

Telephone: _____ Email Address: _____

Please update my IPA membership data with the above information.

Please check if you require special accommodations and/or vegetarian meals. Please describe your requirements: _____

IPA MEMBER

NON-MEMBER (Visit IPA’s website for information on membership to receive the discounted member rate.)

Session Topics: IPA reserves the right to cancel or modify the conference as necessary. Registrants will be advised in advance of schedule or speaker change, if possible.

| SEMINAR REGISTRATION FORM | | | |
|--|--|--|---|
| <i>Please Check or Circle the Educational Seminars You Will Attend</i> | | | |
| Thursday, November 4, 2010 | | | |
| 8:30 a.m. – 9:45 a.m. | 10:15 a.m. – 11:30 a.m. | 1:30 p.m. – 2:45 p.m. | 3:15 p.m. – 4:30 p.m. |
| Corporate Business Filings | Nuts and Bolts of Forming an Illinois Not-For-Profit Corporation and Qualifying it as a 501(c)(3) Organization | Best Practices for In-House Paralegals | Accounting for Paralegals – “Look Behind the Numbers” |
| Computer Forensics 101 | eDiscovery for Paralegals | Ethical Issues in Electronic Discovery | Adding Value in the Selection Process of an Economic Expert Witness |
| Introduction to Summation iBlaze | Hindsight and Probable Cause | Employment Law Update | The Legal Implications of Social Networking in the Employment Context |
| The Implications of Managing Personal Health Information (PHI) Within Litigation | Deed in Lieu of Foreclosure | Immigration Law Basics and the Role of the Paralegal | The Emerging Field of Animal Law |
| Legal Research | Legal Writing | Auditing Your Trademark Portfolio | Can I Do That? Paralegal Ethics |

(CONTINUE TO FEES ON BACK)

IPA MEMBER REGISTRATION FEES

● **FULL DAY (4 sessions)**

- \$175 IPA Member Early-Bird Registration (Lunch Included)
(Postmarked on or before October 4, 2010) ***BEST VALUE***
- \$200 IPA Member after October 4, 2010 (Lunch Included)
- \$225 IPA Member after October 31, 2010 and On-Site (Lunch Included)

● **HALF DAY (2 sessions)**

- \$125 IPA Member Early-Bird Registration
(Postmarked on or before October 4, 2010)
 Add \$25 if attending the Lunch
- \$135 IPA Member after October 4, 2010
 Add \$25 if attending the Lunch
- \$160 IPA Member after October 31, 2010 and Day of Event Registrations
 Add \$25 if attending the Lunch

● **QUARTER DAY (1 session)**

- \$75 IPA Member
 Add \$25 if attending the Lunch
- \$100 IPA Member after October 31, 2010 and Day of Event Registrations
 Add \$25 if attending the Lunch

NON-MEMBER REGISTRATION FEES

● **FULL DAY (4 sessions)**

- \$225 Non-Member Early-Bird Registration (Lunch Included)
(Postmarked on or before October 4, 2010) ***GREAT VALUE***
- \$250 Non-Member after October 4, 2010 (Lunch Included)
- \$275 Non-Member after October 31, 2010 and On-Site (Lunch Included)

● **HALF DAY (2 sessions)**

- \$150 Non-Member Early-Bird Registration
(Postmarked on or before October 4, 2010)
 Add \$30 if attending the Lunch
- \$160 Non-Member after October 4, 2010
 Add \$30 if attending the Lunch
- \$185 Non-Member after October 31, 2010 and Day of Event Registrations
 Add \$30 if attending the Lunch

● **QUARTER DAY (1 session)**

- \$100 Non-Member
 Add \$30 if attending the Lunch
- \$125 IPA Member after October 31, 2010 and Day of Event Registrations
 Add \$30 if attending the Lunch

LUNCH (Celebrating Paralegal Day/IPA's 38th Anniversary, from 11:30 am – 1:30 pm)

LUNCH SELECTION - If you are attending the lunch, please select an entrée below. Lunch is included with a Full Day registration. If no entrée is selected, registrant will be served the *Tortilla Crusted Breast of Chicken*.

- Tortilla Crusted Breast of Chicken in Roasted Tomato Sauce and Cilantro Rice
- Chili Marinated and Grilled Flat Iron Steak with Spicy Roasted Butternut Squash Puree
- Mushroom and Asparagus Risotto
- Baked Horseradish Crusted Whitefish in Lemon Herb Butter Sauce with Spicy Roasted Butternut Squash Puree

PAYMENT

I wish to pay by:

CHECK. Enclosed is a check in the amount of \$_____ made payable to the Illinois Paralegal Association.

CREDIT CARD. Please fax registration to 815.462.4696. Please charge to my: VISA MASTERCARD DISCOVER AMERICAN EXPRESS

Name on Card _____ Signature _____

Card Number _____ Expiration Date _____ Security Code _____

Billing Address _____ Billing City _____ Billing Zip Code _____

discovery. In this session, we will discuss the potential ethical issues to keep in mind during discovery so that you can effectively and efficiently represent your client while upholding your ethical obligations. *Adam Bottner, Esq., Business Development Manager, and Jeff Jacobs, Esq., Senior Consultant, Daticon Electronic Evidence Discovery, Inc.*

Employment Law Update: In recent years there have been changes and developments in employment law, in particular under the Family Medical Leave Act and the Fair Labor Standards Act. There is a growing trend in lawsuits against employers for unpaid wages, and misclassification that have potentially broad sweeping liability for employers. This presentation will focus on the new developments in these two arenas, as well as important developments that are on the horizon. *Aaron B. Maduff, Esq., and Walker Lawrence, Attorney, Maduff & Maduff, LLC.*

Immigration Law Basics and the Role of the Paralegal: This session will include a general overview of U.S. immigration law, including family and employment-based non-immigrant and immigrant (green card) visa classifications, asylum, and humanitarian issues. We will also discuss the role of a paralegal in an immigration practice, and the latest "hot topics" in the current immigration reform debate. *Michael R. Jarecki, Esq., Law Office of Michael R. Jarecki.*

Auditing Your Trademark Portfolio: This session will cover how to manage, maintain and update your U.S. trademark portfolio. We will review all the areas integral to auditing your portfolio including what a trademark audit is, as well as the importance, elements and mechanics of a trademark audit. *Billie Jean Smith, Lori Meddings, and Ariana Voigt, Partners, Michael Best & Friedrich LLP.*

3:15 pm – 4:30 pm

Accounting for Paralegals – "Looking Behind the Numbers": This seminar will give paralegal professionals an overview of accounting terminology and documentation commonly produced by plaintiffs and defendants in litigated matters. The overview will include differences between GAAP and tax basis of accounting, as well as, an introduction to financial statements (i.e. income statements, balance sheets, & cash flow statements) to assist paralegals in understanding and sifting through high volumes of financial and operational data. Also, the seminar will include real world case studies and examples of how "looking behind the numbers" can influence case outcomes. *Reinhard Krestel, CPA/CFF, CVA, CFFA, Senior Manager, Matson Driscoll & Damico, LLP.*

Adding Value in the Selection Process of an Economic Expert Witness: The selection of an economic expert witness in matters concerning valuation and/or financial damage in connection with a business, security interest, or specific assets, e.g., intellectual property, requires a multi-dimensional approach in identifying and interviewing potential experts for a litigation team's consideration. This talk will highlight and provide paralegal professionals a decision framework in order to recommend a "top shelf" slate of candidate experts. By way of example, certain nuances related to financial and industry domain knowledge will be discussed. *Rick S. Nathan, ASA, CFA, Managing Director, The Sorbi Group, LLC.*

The Legal Implications of Social Networking in the Employment Context: You already know, or are learning, that social media tools like Facebook, Twitter and LinkedIn are wonderful ways to keep in touch with your friends and business associates. However, unthinking posts in such forums could pose significant issues in the employee-employer context, and may lead to disputes between parties or even a lawsuit. Social networking likewise plays a growing role in the discovery process. In this session, we will

discuss the privacy of the employee v. the rights of the employer, the many ways that social networking affects workplace matters, the legal issues around use and infringement, defamation issues which can arise through such sites, and social networking as a burgeoning area for garnering evidence in criminal, civil, or other investigatory matters. *Lorrie Peeters, Attorney, Caffarelli & Siegel Ltd.*

The Emerging Field of Animal Law: Animal law encompasses not only companion animals, commonly referred to as "pets," but also those animals living in the wild, and animals used for entertainment, food and in research. Although a non-traditional legal field, animal law involves traditional subject matter, such as tort, contract, criminal and constitutional law. In this session, we will review the topics that are likely to arise in a typical practice setting, such as: Animal Custody Disputes, Animal Welfare Investigations, Consumer Fraud/Misrepresentation, Defending Dog Bites, Housing Disputes and "No Pet" Policies. *Anna E. Morrison-Ricordati, Attorney, AMR Law Group, LLC.*

Can I Do That? Paralegal Ethics: Join us for a fun and informative discussion of paralegal ethics. We will explore the ABA Model Rules of Professional Conduct, the IPA Code of Ethics, and apply the rules to the daily work of paralegals. Learn how to identify conflicts, deflect potential ethical dilemmas and maximize productivity by learning what substantive legal duties paralegals can perform and issues they may face. Reinforce your knowledge of ethics and learn to be more productive while following ethical guidelines. *Sharon Patterson, Legal Assistant Supervisor, Goldberg Kohn, and Caren Mansfield, Paralegal, Baker, Baker & Krajewski LLC.*

LUNCH PRESENTATION

November 4, 2010 is PARALEGAL DAY in Illinois. The IPA will be celebrating this occasion, as well as the 38th Anniversary of the Association.

KEYNOTE SPEAKER:

*Edward C. Carter,
Assistant Illinois Attorney General*

Menu will consist of:

*Seasonal Mixed Greens with a Creamy Herb,
Roasted Shallot and Chive Vinaigrette*

Choice of Entrée:

*Tortilla Crusted Breast of Chicken in
Roasted Tomato Sauce and Cilantro Rice*

Or

*Chili Marinated and Grilled Flat Iron Steak
with Spicy Roasted Butternut Squash Puree*

Or

Mushroom and Asparagus Risotto

Or

*Baked Horseradish Crusted Whitefish in
Lemon Herb Butter Sauce with Spicy Roasted
Butternut Squash Puree*

*Mascarpone and Ricotta Cheesecake with
Wild Strawberries*

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Don't miss out:

*Join us for our Annual Fall
Education Conference on
November 4, 2010*

DO NOT IGNORE THIS BROCHURE.

Programs and instructors are subject to change without notice.