

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



Spring Your Career Forward in 2010

*MAY 13, 2010
UNION LEAGUE CLUB OF CHICAGO*

EDUCATION SEMINAR TOPICS

Thursday, May 13, 2010

8:30 am – 9:45 am

SEC's Summary Prospectus Initiative: How It Effects the Disclosure Process for '40 Act Companies: Under the leadership of Christopher Cox, the SEC passed two significant changes to Compliance communications that leverage technology-XBRL and Summary Prospectus. Concurrent with these initiatives was the realization that the SEC had been deficient in scrutinizing the activities of Bernie Madoff and others, and Mary Shapiro, Cox's successor, is focused on enforcement at a time when XBRL and Summary Prospectus are being launched by '40 Act companies for the first time. In this seminar, the speaker will review some of the real-world challenges fund companies face in implementing the Summary Prospectus Rule at a time of heightened enforcement. He will describe what has and has not worked from the perspective of regulators and document management and content distribution of Summary Prospectuses. *Daniel E. Marschke, Global Investment Markets, RR Donnelley Financial Services Group.*

Technical Evidence Management Theory: The earlier and more appropriately litigation technology is applied, the lower case costs and greater evidentiary control will be achieved. This class will help students create metrics and a framework to achieve these goals through a balance of: Client internal ESI capabilities; Firm ESI capabilities; Third party ESI capabilities; and Timely and appropriate application of technology. *Larry Lieb, CCA, Director of Electronic Discovery, Esquire Solutions.*

Overview of Franchise Laws and a Paralegal's Role in Franchising: Franchising is a method of distribution used in many industries. From a franchisor's in house legal department to law firms representing franchisors, paralegals play an important role in compliance and registration which are critical to a franchisor's operations. This session provides an overview of franchise laws and a paralegals role in legal compliance. *Amy Cheng, Attorney, Cheng Cohen LLC.*

Documentation and Coordination of Tax-Deferred Exchanges: This seminar will discuss tax-deferred exchanges, their structure and use, how to properly document them and how to coordinate with the Qualified Intermediary and title company for a smooth closing. The seminar will also review the basics of 1031 Exchanges. *Hugh Pollard, Vice President/Regional Manager, First American Exchange Company.*

High Performance Team Toolkit (8:30 am – 11:30 am): Ever feel misunderstood? Frustrated when dealing with other people? Today's cross-functional teams - whether you're interacting with your office mates, or getting ready for trial - requires learning how to deal with different temperaments & styles. During this interactive session, you explore the way you think - learn how to describe how your own brain works. Then, you identify your communication style. Self-awareness about your thinking & communication preferences, in most human interactions, is the first step to discovering how to balance what you need against accommodating others. By the end of this session, you will be able to apply strategies, techniques & tools for taking advantage of diversity in the modern workplace so you can overcome frustration, prevent mistakes, and save time & money. *Trish Uhl, PMP, CPLP, Owl's Ledge LLC and Ken Phillips, Ph.D., CPLP, Phillips Associates.*

6th in Series of PACE Study - 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.*

10:15 am – 11:30 am

The SEC X Files: XBRL and Interactive Data Reporting: In 2003, the SEC began investigating data tagging to further improve its on-line EDGAR disclosure system. By 2009 the Commission began finalizing interactive data reporting rules for financial data submitted by operating companies, mutual funds and credit rating agencies. Such data will now be tagged in annual and quarterly reports, registration statements and financial updates by using XBRL (eXtensible Business Reporting Language). This seminar will review the nature and terminology of XBRL tagging, the final SEC rule reporting requirements being phased in, as well as the process for understanding, preparing and complying with the rule with which corporate and securities paralegals should be familiar. *Kenneth Fritz, Senior Vice President, Compliance, Bowne.*

Searching in 2010: Reduce Expenses & Increase Defensibility: Every phase of the e-discovery process – and indeed the litigation continuum – presents an opportunity to cut costs. The current dilemma facing organizations today is how to control spending without sacrificing quality. One prime arena that demonstrates how the power of technology can increase economic efficiency is the use of advanced searching techniques, such as concept searching, near-duplication and e-mail threading. These techniques are gaining traction, but what do these terms mean exactly? How are they used to conduct a cost-effective, defensible search? And, what about getting the most out of keyword searches? This presentation will explore well-established and emerging search technologies, and provide best practices to increase the effectiveness of your next search process. *Jen Freeman, Senior Legal Consultant, Kroll Ontrack.*

Loan Modifications: Weathering the Financial Crises One Loan At A Time: In today's economic climate, many borrowers are feeling the pinch of frozen salaries, shrinking assets, and unemployment. Likewise, Businesses borrowers are feeling financial stresses of the current economy. As a result, many loans are in default, with dim prospects moving forward. Lenders and borrowers, looking to avoid an avalanche of foreclosures, lawsuits, and potentially insolvency, are frequently exploring modifications to the original loan to "weather" the financial crises. The presentation will discuss the different techniques available to lenders and borrowers to allow the continued performance of the loan and to avoid foreclosure, litigation, or bankruptcy. *Francisco E. Connell, Attorney, Chuhak & Tecson, P.C.*

What's New with Estate/GST Tax Repeal and To What State Does a Fiduciary Owe Income Taxes?: In this seminar, we will cover the new developments in estate/generation skipping transfer taxes. We will also take a look at the State income taxation of Trusts and Estates and issues concerning domicile and residency. *Rebecca Wallenfelsz, Partner, Chapman and Cutler LLP.*

Navigating the Bluebook: Proper Citation in Legal Writing: Proper Bluebook citation and efficient and effective cite checking techniques are crucial for today's paralegal. In this session we will take a practical look into proper citation of referenced works within court documents and legal memoranda, move beyond memorization of the rules and focus on building confidence in navigating the Bluebook: A Uniform System of Citation to easily find answers to any citation questions. In addition, participants will be provided with an overview of the local custom and practice relating to citation within the Illinois and Cook County court systems. *Mary Joly, faculty member, Loyola University Chicago, Institute of Paralegal Studies.*

SEMINAR REGISTRATION FORM

Thursday, May 13, 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.
SEC's Summary Prospectus Initiative: How It Effects the Disclosure Process for '40 Act Companies	The SEC X Files: XBRL and Interactive Data Reporting	Proxy Statement Disclosure	Investment Fraud
Technical Evidence Management Theory	Searching in 2010: Reduce Expenses & Increase Defensibility	Taming the E-Discovery Beast: Successful Strategies to Reduce Cost and Risk	Legal Competition: Strategies for Transparency and Collaboration in E-Discovery
Overview of Franchise Laws and a Paralegal's Role in Franchising	Loan Modifications: Weathering the Financial Crises One Loan at a Time	The Law of Employer-Employee Non-Competes: Basic Principles and Current Trends in Illinois	Copyrights and Copywrongs: A Brief Introduction to the Law of Copyright
Documentation and Coordination of Tax-Deferred Exchanges	What's New with Estate/GST Tax Repeal and To What States Does a Fiduciary Owe Income Taxes?	A Practical View of Article Nine	The Mysteries of Secret Liens
High Performance Team Toolkit		Resurrecting the "Personal" in Interpersonal Skills	Life After the E-Introduction
6th In Series of PACE Study – Law Office Management	Navigating the Bluebook: Proper Citation in Legal Writing	Federal Rules of Civil Procedure	Paralegals: The Next Decade

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 a full day of seminars.**

Copy this form for additional registrations, as needed.

A \$20 late fee for rush handling is assessed after May 7, 2010. A full refund is available for a written cancellation received by May 7, 2010. 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, Discover or American Express.

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

Name _____

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Registration Fees

	Member	Non-Member
One day	\$175	\$225
Half-day	\$125	\$150
Quarter-day	\$75	\$100
Lunch	\$25	\$30
<small>(Indicate choice below. If no choice indicated, registrant will receive pasta w/chicken)</small>		
Late fee (May 7th)	\$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.

- Penne Pasta with Grilled Chicken, Candied Tomatoes and Mushrooms, with a Basil Pesto Cream
- Penne Pasta with Candied Tomatoes and Mushrooms, with a Basil Pesto Cream

Mail Registration Form and check to:
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1:30 pm – 2:45 pm

Proxy Statement Disclosure: During this seminar, we will briefly discuss the purpose of a proxy statement and the various reasons a company solicits proxies from its shareholders; review the preparation of a proxy statement, with particular focus on thorny issues including compensation; review shareholder proposals from the current proxy season and new proposals expected in upcoming years; and discuss what to do in a proxy contest. *Carol Forsythe, Corporate Vice President, Law, Securities, Motorola, Inc.*

Taming the E-Discovery Beast: Successful Strategies to Reduce Cost and Risk: Controlling the cost of electronic discovery is a top priority for today's corporations and their outside counsel. However, many legal and IT professionals are unsure how to tame the mysterious beast that is e-discovery. Join us in this session to learn best practices for reducing volume defensibly at every step; how small differences in data and review strategy can save big money; and the smart way to use (or not use) early case assessment. *Doug Kaminski, Director, North Central US, Clearwell Systems, Inc.*

The Law of Employer-Employee Non-Competes: Basic Principles and Current Trends in Illinois: In an effort to protect confidential information or trade secrets, employers often require employees to sign agreements containing a covenant not-to-compete. Advances in technology have made it easier than ever for employees to obtain and misappropriate their employer's confidential information and trade secrets, whether to compete with the employer in a new business or on behalf of a competitor. Although they can be enforceable, Illinois courts have imposed limits on the scope of such agreements and refused to enforce such agreements which are overly broad and unreasonable. This presentation will cover the basic principles related to the scope and enforceability of non-competes under Illinois law. The presentation will also discuss current trends in Illinois, particularly in light of a recent Illinois Appellate Court decision, *Sunbelt Rentals v. Ehlers*, likely expanding the ability of employers to enforce such covenants. *Ryan A. Haas, Esq., Attorney, Chuhak & Tecson, P.C.*

A Practical View of Article Nine: This seminar will be an open discussion of the current legal landscape surrounding Article Nine. This discussion is based on both observations from the market but also a detailed look at several jurisdictions' views on these matters. This includes bankruptcy courts, federal district courts, and courts of appeal. *Daniel W. Lias, Esq., UCC Business Consultant, CT Corporation.*

Resurrecting the "Personal" in Interpersonal Skills: What happened to face-to-face communication? Has technology taken the place of actual conversation? Have instant and text messaging contributed to the demise of effective written correspondence? E-mail has created an entire generation of workers who do not know how to correctly punctuate typed documents and avoid personal encounters altogether. Let's get back to basics and reintroduce the art of good dialogue as well as fine-tune oral and written communication skills. *Suzanne C. Witt and Jennifer Mifflin, Firefly Legal.*

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.*

3:15 pm – 4:30 pm

Investment Fraud: This presentation will provide an overview of common frauds involving brokers, investment advisers, and unregistered promoters. Tips will be provided on spotting scams in sales pitches and offering documents. The elements needed to prove a fraud case will be discussed along with resources available to assist in pursuing investment related cases. *Tanya Solov, Director, Illinois Securities Department.*

Legal Competition: Strategies for Transparency and Collaboration in E-Discovery: Litigators, judges, and organizations such as the Sedona Conference have implored counsel to rethink the adversarial practices that have long been the modus operandi. A movement to refocus litigation toward a more transparent and cooperative resolution of legal disputes is in process. This timely seminar will teach you how to cooperate with your legal opponent without rolling over; strategies to make your legal discovery process more transparent; best practices for meet and confer preparation; and what judges approve or disapprove of in this new legal environment. *Doug Kaminski, Director, North Central US, Clearwell Systems, Inc.*

Copyrights and Copywrongs: A Brief Introduction to the Law of Copyright: This seminar will cover Copyright law, including (1) What is the subject matter of copyright? (2) When does a copyright accrue? (3) How and why to register a copyright? and (4) What constitutes copyright infringement? *Steven L. Baron, Partner, Mandell Menkes LLC.*

The Mysteries of Secret Liens: This presentation will focus on consignments, purchase money security interests and bailments. It's not just filing your UCC to perfect your security interest; other forms of notice may be required. *Marie C. Oldham, Chapman and Cutler LLP.*

Life After the E-Introduction: This workshop takes you from Facebook to Face-To-Face. For those whose networking skills have gotten rusty thanks to various Social Networking outlets (e.g. Facebook, LinkedIn, Twitter, etc.), this high-energy workshop will give participants the tools to take those electronic connections one step further. Participants will leave the workshop with answers to the question, "What to do when I meet someone in person?" *Jasmin French, J French.*

Paralegals: The Next Decade: Roles and Relationships of paralegals in an age of increased legal services "outsourcing," increased legal costs, and a bad economy. Both new and old ethics issues will be explored through discussion of hypotheticals and creative role-playing. *George Kuhlman, ABA Ethics Counsel, and Associate Director of its Center for Professional Responsibility.*

LUNCH PRESENTATION

Networking in A Recession: *Out With The Old And In With New*

BY:

Jasmin French of J French

Long gone are the days of long interview lunches, free water bottles or gym bags with the firm's logo or the chore of choosing between multiple companies all vying for your skills and expertise. Everyone is scaling back and the interview process is not immune to the effects of a recession. Join Jasmin French as she shares how to get the most bang for your buck. Specifically, how to leverage a few or perhaps just one interaction with a potential employer that will leave that individual wanting to know more about you.

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