

*THE
ILLINOIS PARALEGAL ASSOCIATION
PRESENTS ITS 2011 FALL EDUCATION CONFERENCE*



A Commitment to Excellence

*NOVEMBER 3, 2011
UNION LEAGUE CLUB OF CHICAGO*

8:30 am – 9:45 am

Behind the Scenes at the Illinois Secretary of State (The Service Company Point of View): You've studied the statutes, but somehow your filing still gets rejected. You fill out the forms exactly the way the state says they should be filled out, but it still doesn't go through. In Corporate and UCC, the Illinois Secretary of State follows basic procedures. In this session we will focus on procedures vs. courtesies at the Illinois Secretary of State to help you better understand what happens after your request leaves your desk. *Lindsay Gates, President/CEO and Tonya Gideon, VP of Operations – Senior Service Specialist, Service Partners of Illinois, Inc.*

A Practical Guide to Managing Social Media Based Evidence: A review of key considerations for paralegals working with social media based evidence. Technology advancements have created many grey areas in terms of reasonable expectations of privacy, online identity, free/protected/regulated speech and social media acceptable use policies. Class participants will also be armed with specific techniques and tools to identify and collect evidence from social media sources. *Larry Lieb, Chief Innovation Officer, Scarab Consulting.*

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.*

The Illinois Residential Real Property Transfer on Death Instrument Act and “What Every Divorce Attorney Should Know About Real Estate Law - and Vice Versa”: This seminar will cover two issues – (1) On January 1, 2012, the Illinois Residential Real Property Transfer on Death Instrument Act is set to become law. This act provides for the creation of a Transfer on Death Instrument. Broadly speaking, this document is the equivalent of a will for the disposition of residential real estate—that is, it is the equivalent of a will, but it does not require the admission in a probate proceeding. Bales will discuss this new legislation. (2) This part of the seminar will be a wide-ranging of various aspects of real estate law sometimes overlooked by both divorce attorneys and even their real estate brethren. Even real estate paralegals should find much of interest in this topic. *Dick Bales, Assistant Regional Counsel, Chicago Title Insurance Company.*

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 Stein, Faculty Member, Loyola University Chicago, Institute of Paralegal Studies.*

10:15 am – 11:30 am

Corporate Minute and Minute Book Preparation and the Key Role of the Corporate Paralegal: This session will cover the variations on types of minutes (annual or special), the importance of periodic maintenance of the corporate minute book and the role of the paralegal in their preparation. *Pamela Belyn, Esq., Carlson Dash LLC.*

Path of Least Resistance? Non-Linear Review in Litigation Today: Let's face it. The gold standard for review is looking at every document in a linear fashion, page by page and bit by bit. But what happens when you have millions of pages to review? As data volumes continue to grow, non-linear review methods are gaining in popularity AND effectiveness. Both corporate law department and law firm legal professionals will leave this session knowing more about this hot topic so they can make the best decision for themselves and their clients. We'll focus on (1) Substantive law, precedent cases, and judicial opinion related to non-linear review; (2) Newest trends including advanced concept search, predictive coding and machine learning (intelligent review); and (3) Defensability of this new technology and intelligent workflows. *Douglas G. Kaminski, Director of Sales, Clearwell Systems, a part of Symantec.*

Working Smarter with Excel (2007 & 2010): This seminar will help you incorporate these features into your arsenal to make your role more effective: (1) Create PivotTables to summarize, analyze, explore, and present summary data; (2) Design PivotChart report to help visualize PivotTable report summary data so that you can easily see comparisons, patterns, and trends; (3) Analyze subsets with advanced filtering; (4) Incorporate shortcuts for linking multiple files; (5) Use Data Validation techniques to reduce data entry errors and test data; (6) Using Excel as the “middleman” to transfer data among Word, PowerPoint, Access and other applications; (7) Create a VLOOKUP to look at a value in one column, and find its corresponding value on the same row in another column; (8) Use other advanced functions as desired; (9) Apply conditional formatting to make certain data stand out, helping you to analyze data, and to identify patterns and trends; (10) Improve views of data with Freeze Panes and Subtotals; and (11) Locking parts of a workbook with Protection Features. *Cathy Hosek, Hosek Consulting Group.*

Elder Law Essentials: Elder Law Essentials discusses estate planning with a view toward the elder care journey, disability planning that balances the needs of the ill spouse and the healthy spouse and understanding how to access government benefits including Medicaid and VA to help your client pay for care. This course will help you recognize long term care planning opportunities and avoid the common mistakes caused by lack of knowledge of public benefit rules and limitations. *Katherine D. Motley, Executive Vice President of Operations and Senior Paralegal, Law ElderLaw, LLP.*

Trends in Law Firm Research: Big things are happening in the world of legal information and research. The future is not only about working smarter; but also more efficiently and remotely! Join us for a look at the latest developments in three of the most rapidly evolving areas: Cost-Prevention, Mobile Research Solutions, and Knowledge Management. *John DiGilio, MLIS, JD.*

LUNCH PRESENTATION

The Criminal Appeals Process

Presented By

Steven Becker, Esq., of Becker Stephenson LLC

We have all heard the news stories about death-row inmates being freed after having been found not guilty through DNA testing, and of prisoners being given new trials after the appellate court has determined that violations of civil rights have occurred. Steven Becker, a former assistant defender at the Office of the State Appellate Defender in Chicago, and a frequent lecturer throughout Europe on international criminal law, will be discussing the criminal appeals process in depth and will relate his involvement in three recent exonerations.

1:30 pm – 2:45 pm

Corporate Filing & Retrieval Made Easy – Working With Delaware: During this presentation, we will discuss why Delaware is known as the Corporation Capital of the World. Additionally, the program focuses on simplifying and understanding pricing, expedite fees and special circumstances when reserving names, filing and retrieving corporate documents. Whether you are a new corporate paralegal or have years of experience, this program is for you and promises to be a real learning experience and refresher. *Jeanne Carnahan, Vice President of Sales, National Corporate Research, Ltd.*

Using Mediation in Civil Matters: Mediation is a private and confidential way of resolving disputes between two or more parties. This seminar will present the paralegal’s role in preparing for and attending mediation in civil matters. *Mary Kay Lieberman, RP, MK Paralegal Services.*

Adobe Acrobat for the Legal Professional: This class will cover some of the more technical aspects of Adobe Acrobat Professional. The presentation will cover (1) Modifying Existing PDFs; (2) Exporting PDFs to Word; (3) PDF Security; (4) Creating PDF Portfolios; (5) Creating Fillable PDF Forms; (6) Markup and Collaborating on PDFs; and (7) Bates Numbering and Redacting. There will be a question and answer period on any of the material covered in the presentation. *Bob Nash, Vice President of Sales & Marketing, Barkley Court Reporters.*

Intellectual Property Primer: The basics of intellectual property will be presented, including patents, trademarks, copyrights, and trade secrets. We will discuss the basics of each, what each protects and doesn't protect and the interaction or cross-over between the different types of IP. If time is available, we can talk in more depth about the requirements for filing for patents and trademarks. *Mitchell Weinstein, Esq., Levenfeld Pearlstein, LLC.*

The Write Way: No matter how good we think our writing skills may be, there is always room for improvement. In this session, we will take a look at ways in which you can assess your own writing skills and then take them to the next level. Join us as we do a little self-SWOT and then talk about reaching new audiences. *John DiGilio, MLIS, JD.*

3:15 pm – 4:30 pm

Whistleblower Protection: The Dodd-Frank Wall Street Reform and Consumer Protection Act's Expansion of SOX Whistleblower Protections: The 2010 Dodd-Frank legislation provided for a substantial expansion of financial incentives offered to whistleblowers who report claimed illegal corporate conduct, expanded protections to whistleblowers who claim retaliation by their employer, and added a new group of private companies to those specifically covered by Sarbanes-Oxley (SOX). This program will outline the expanded whistleblower incentives, protections and companies covered by SOX, outline the steps federal agencies have taken to enforce the new whistleblower provisions, and offer suggested steps client companies may take to limit their potential exposures. *Gregory G. Thiess, Vice President and Assistant General Counsel, Robert Bosch LLC.*

Demystifying the Contract-Attorney Process: In this seminar, the speakers will share industry secrets and aim to leave everyone armed to staff their next document review project with the agency of their choice. They will provide useful tools for paralegals who manage document review projects that utilize contract attorneys. They will tackle issues such as proper screening processes, the use of an agency's offsite space and contract attorney supervision. Armed with that knowledge, paralegals will learn how to effectively staff and manage such projects and ultimately help their law firm or corporation control costs and save time and money. *Jill Elden Rorem, Esq., Senior Manager, Legal Staffing and Sara Gentry, Esq., Manager, Legal Staffing Service, Blackman Kallick.*

"What to Know if You are Injured at Work" - The New Illinois Workers Compensation Reform Changes: Illinois has recently undergone major changes in its Workers' Compensation system. What does this mean for you if you are injured at work? This session will explore what you need to know and give you an overview of the Workers' Compensation system in Illinois. Also, learn about some of the unique roles that paralegals play in handling Workers' Compensation matters for an International Corporation. *Robert Johnson, Managing Counsel, Workers Compensation Practice Group, McDonald's Corporation.*

Immigration Enforcement Trends and I-9 Compliance for Employers: U.S. employers have been subject to civil and criminal penalties for immigration violations since 1986. In the past several years, however, the government has conducted thousands of audits checking to see whether employers are in compliance with both technical and substantive laws relating to I-9 requirements. This program will provide an overview of the I-9 process and discuss strategies to protect employers from civil and criminal liabilities. *Gabrielle M. Buckley, Esq., Vedder Price P.C.*

Legal Ethics 2011: This seminar will present current trends on UPL and paralegal activities as well as discussing the practicalities of ethics in real world scenarios. *Mary Kay Lieberman, RP, MK Paralegal Services.*

LUNCH

Members attending a full day of seminars receive lunch included in registration fees. Lunch can also be purchased for a nominal charge.

CLE CERTIFICATES

In order to receive CLE credit, you MUST attend the full seminar, sign in at the beginning of the seminar, and sign out at the end of the seminar. CLE certificates will NOT be given out at the registration desk. You MUST obtain your CLE certificate from the proctor in your seminar.

REGISTRATION FORM
A Commitment to Excellence
November 3, 2011

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 7, 2011 to qualify for the Early-Bird rate. The Early-Bird registration rate is only available to Full Day and Half Day participants. Beginning October 8, 2011, 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 28, 2011. 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 diet restrictions. 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 changes, if possible.

SEMINAR REGISTRATION FORM			
<i>Please Check or Circle the Educational Seminars You Will Attend</i>			
Thursday, November 3, 2011			
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.
Behind the Scenes at the Illinois Secretary of State (The Service Company Point of View)	Corporate Minute and Minute Book Preparation and the Key Role of the Corporate Paralegal	Corporate Filing and Retrieval Made Easy – Working with Delaware	Whistleblower Protection: The Dodd-Frank Wall Street Reform
A Practical Guide to Managing Social Media Based Evidence	Path of Least Resistance? Non-Linear Review in Litigation Today	Using Mediation in Civil Matters	Demystifying the Contract-Attorney Process
The Paralegal Project Management Toolkit	Working Smarter with Excel (2007 & 2010)	Adobe Acrobat for the Legal Professional	"What to Know if You are Injured at Work" – The New Illinois Workers Compensation Reform Changes
The Illinois Residential Real Property Transfer on Death Instrument Act	Elder Law Essentials	Intellectual Property Primer	Immigration Enforcement Trends and I-9 Compliance for Employers
Navigating the Bluebook – Proper Citation in Legal Writing	Trends in Law Firm Research	The Write Way	Legal Ethics 2011

(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 7, 2011) ***BEST VALUE***
- \$200 IPA Member after October 8, 2011 (Lunch Included)
- \$225 IPA Member after October 28, 2011 and On-Site (Lunch Included)

● **HALF DAY (2 sessions)**

- \$125 IPA Member Early-Bird Registration
(Postmarked on or before October 7, 2011)
 Add \$25 if attending the Lunch
- \$135 IPA Member after October 8, 2011
 Add \$25 if attending the Lunch
- \$160 IPA Member after October 28, 2011 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 28, 2011 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 7, 2011) ***GREAT VALUE***
- \$250 Non-Member after October 8, 2011 (Lunch Included)
- \$275 Non-Member after October 28, 2011 and On-Site (Lunch Included)

● **HALF DAY (2 sessions)**

- \$150 Non-Member Early-Bird Registration
(Postmarked on or before October 7, 2011)
 Add \$30 if attending the Lunch
- \$160 Non-Member after October 8, 2011
 Add \$30 if attending the Lunch
- \$185 Non-Member after October 28, 2011 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 Non-Member after October 28, 2011 and Day of Event Registrations
 Add \$30 if attending the Lunch

LUNCH (Celebrating Paralegal Day/IPA's 39th 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 *Grilled Breast of Chicken*.

\$25 IPA Member, attending Lunch only \$30 Non-Member, attending Lunch only

- Grilled Breast of Chicken with Butternut Squash Risotto
- Slow Roasted Brisket of Beef with Wild Mushroom Sauce
- Oven Roasted Tilapia with Mango Relish
- Grilled Vegetable Platter with Butternut Squash Risotto (*Vegetarian Option*)

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 State _____ Billing Zip Code _____