

***The
Illinois Paralegal Association
Presents its***

2015 FALL EDUCATION CONFERENCE



***November 5, 2015
The Metropolitan Club***

9:00 am – 10:15 am

Behind the Scenes at the Illinois Secretary of State: It is no secret that the Illinois Secretary of State is a mysterious place. This seminar offers a step by step look at what happens with your document once it ends up at the IL Secretary of State. We will look at each department and give a detailed account (and a few tips and tricks) of the process each department takes before stamping your document "FILED". The saying "knowledge is power" could never be more true than when dealing with this particular SOS. This seminar will better enable you to set expectations of your attorneys and your clients. *Lindsay Gates, President/CEO, Service Partners Information Co.*

Predictive Coding and Analytics: Streamlining the Document Review Process: This presentation will focus on how to leverage technology to build efficiencies in terms of time and costs, while still maintaining a defensible, repeatable process. *Chris Chapman, CEDS, Director of Managed Review Services, Xact Data Discovery*

Trusting Trusts—Working with Trusts under Revised Article Nine: The intersection of Trust Law and the Uniform Commercial Code has historically been confusing to almost everyone. The pitfalls have become more common with the growth and expansion of trusts. This one hour seminar by CT attempts to crystalize some of the key points, including examples that can be used as guideposts for those legal professionals that work in this field. *Daniel W. Lias, Esq., UCC Business Consultant, Wolters Kluwer Corporate Legal Services | CT Lien Solutions*

USPTO Pilot Programs That Every Good Patent Prosecutor Should Know About: The current patent Pilot Programs at the USPTO include First Action Interview Pilot Program; After Final Consideration Pilot 2.0 Program; and Global PPH and IP5 PPH pilot programs. There has been much success in entering these programs and getting cases to grant much faster than through the normal prosecution route. The programs are easy to use and inexpensive. Learn what they are, when they are applicable, and some success stories. *Zareefa Flener, Esq., Flener IP Law*

Legal Research: Not knowing how to successfully research legal issues is about as bad as going into a courtroom and not knowing who the judge is and who the clerk is. Successful legal research is critical. Successful researchers must continually seek to improve their research skills and to consider alternative approaches which are effective, efficient and most importantly, which give your firm's clients an advantage against opponents in the legal process. This session will help you continue to build upon your research skills and give you some things to think about as you continue forth in your career. *Nicholas Kourvetaris, Esq., SmithAmundsen LLC*

10:45 am – 12:00 pm

Critical Steps in Creating a Corporate Records and Information Governance Program: This presentation will describe the key components for a corporate records and information management program. It will include steps that corporate Legal can take to build a solid compliance and governance strategy. It will take a holistic view of how RIM programs should be established and the partnerships within an organization that can create change and provide direction. It will describe key components to a corporate RIM program, a governance strategy defined as "standards, processes, roles, and metrics that hold organizations and individuals accountable to create, organize, secure, maintain, use, and dispose of information in ways that align with and contribute to the organization's goals." *Jean M. Ciura, Ph.D., CRM, JMC Information Management Consulting, LTD.*

Cyber Event Trends and Response Tactics: This presentation will discuss cyber trends from around the globe. We will discuss the cyber insurance market over the last 10 years, the effect breach notification laws have had on event tracking and the insurance market, cyber litigation trends, the study of cybersecurity law and the industry response process, timing, etc. *Brookes Tanney, Vice President of Breach Solutions, Epiq Systems*

Navigating Illinois Long Term Care: This presentation will cover long term care in Illinois as it pertains to residents' rights, options for avoiding or leaving long term care and navigating Medicaid. *Suzanne Courtheoux, Attorney, Legal Assistance Foundation*

Intellectual Property for Non-IP Paralegals: Why People Get So Worked Up Over Something They Cannot Touch: This session will touch on all aspects of intellectual property including patents, trademarks, copyrights, trade dress and trade secrets. In particular, we will discuss how these different intellectual property rights differ from each other, how to register for those rights where applicable, and why so much value is placed in intellectual property. Special emphasis will also be placed on how to protect intellectual property rights. *Neil Benchell, Esq., Bishop Diehl & Lee, Ltd.*

Legal Writing: Invaluable Tips to Polish Your Skills: Nothing speaks more powerfully to a judge than that which is written. Increasingly, judges seem to be making more and more decisions based entirely and only on written

submissions of the parties and less and less on oral arguments. So, even if you work for the most effective and most persuasive oral advocate in the legal profession, her skills may never be showcased if the judge does not allow oral arguments. The same cannot be said about the written product. It's an inevitable truth: lawyers in practice are judged by their final written product. The same holds true for paralegals; what they submit to their attorneys is a direct reflection on their ability to communicate and could influence whether the paralegal enjoys a long career with the firm or whether the paralegal is shown the exit door. The importance of effective legal writing cannot be understated. Join us for an insightful session, including some soul searching, and continue to improve your written product. *Nicholas Kourvetaris, Esq., SmithAmundsen LLC*

PARALEGAL DAY/IPA ANNIVERSARY LUNCHEON

Join us and celebrate Paralegal Day in Illinois and IPA's 43rd Anniversary with a luncheon.
All are welcome to attend.

Presented By
Doug Kaminski
Huron Consulting Group

What Matters? Becoming the Paralegal of Tomorrow with Less Stress Today: The role of the paralegal is one of the toughest in the legal world today yet it is also one of the most stable and potentially most rewarding. Based on over two decades of experience and conversations with over 10,000 paralegals and attorneys, Doug will share what he has learned about the profession and how you can get the most from it. From technology to trends in the legal world, ethical obligations, and work/life balance, you'll learn ways to become more impactful and maybe even smile more.

Doug Kaminski is a Senior Director with Huron Consulting Group, a recognized leader in consulting and named by Forbes as one of America's Best Employers in 2015.

1:30 pm – 2:45 pm

Authentication and Legalization Demystified: In this increasing global economy, the production and legalization of documents for use in international transactions is on the rise. Seminar participants will get a better understanding of the Hague Convention Abolishing the Requirement of Legalization for Foreign Public Documents, which countries participate and the steps required to get documents apostilled or legalized/authenticated for countries that are Hague members as well as those that are not. Common mistakes that are made in the authentication/legalization process will be reviewed and tips will be provided for avoiding delays and problems with documents. *Teri M. Mayor, Vice President of Product Management for Business Entity Services, National Corporate Research, Ltd.*

How To...Issuing Citations to Discover Assets in State Court: So you have obtained a money judgment against the defendant, now how do you collect? Come to this litigation practice session to learn about the rule regarding supplementary proceedings, 735 ILCS 5/2-1402, and obtain practice pointers on how to issue citations to discover assets directed to debtors and third-parties. We will discuss the overall citation process, review the forms required by the court, and how to fill them out. We will also discuss the process for issuing citations in federal court cases. *Tisha Delgado, Paralegal*

Illinois Decanting and Directed Trusts: This presentation will focus on two relatively new statutes regarding trust decanting and directed trusts. I will cover the requirements of the Illinois statute for decanting a trust and discuss the considerations relating to decanting and the potential tax issues raised by decanting. I will also summarize the Illinois statute for directed trusts and address issues related to communication and coordination among the various office holders – and the division of labor and the allocation of risk and liability among them. *Kevin M. Noonan, Esq., Much Shelist, P.C.*

Wizardry in Microsoft Word: Styles & Text Formatting: Have you ever worked on a document, and just before you finished been derailed by a formatting issue? Spending minutes...or even hours trying to fix paragraph alignment, spacing or add line numbers? Microsoft Word can be one of the most frustrating, or powerful tools in your office. It's all in how you use it. In this session, we break down and explain the features that will take your documents from dreadful, to delightful in just minutes. *Chelsey Lambert, Vice President of Marketing & Communications, Smokeball*

Legal Ethics 2015: This seminar will present back to basics and current trends on the unauthorized practice of law as it pertains to paralegals, along with a brush up on paralegal ethics. Bring your questions too so that we may discuss the practicalities of ethics in real world scenarios. *Mary Kay Lieberman, RP®, ILAP*

3:15 pm – 4:30 pm

The Global Entity Life Cycle: With more and more companies expanding into international markets, the challenge of maintaining compliance is proportionally increasing. The rules and regulations are hardly consistent from country to country, and complicating the matter is the changing landscape of international rules and regulations. Join us for an overview of the global entity life cycle where we will discuss how to effectively coordinate your compliance efforts including: formation, transactional elements, managed elements, and ending with liquidation. *Bobby Paulus, Head of Global Corporate Services, CT Corporation*

Capturing Webpages as Evidence: The Risks and Best Practices You Need to Know: Today, the collection of online evidence is a crucial aspect of many cases. Even before litigation begins, both plaintiff and defense frequently scour the Internet to build a case for or create a defense against an anticipated lawsuit. The search continues throughout the case. Legal professionals looking to capture and admit online content must consider the ephemeral nature of the Internet and the authentication challenges specific to web-based content. This presentation will discuss the different approaches courts have used to evaluate the admissibility of online evidence. In addition, we will examine the ways to authenticate web evidence under the Federal Rules of Evidence (FRE) 901. Finally, the presentation will explore the different methods of capturing online content and outline best practices for capturing, storing and presenting web evidence. *Elana Harris, Esq., Head of Business Development Operations, Page Vault*

Exploring the Different Types of Legal Entities That Hold Title to Illinois Real Estate: There are many different types of entities that hold title to Real Property. We will explore the various documentation that a title company would need to review, in order to insure a conveyance or mortgage. *Jeff York, Esq., Assistant Vice President, Assistant Regional Counsel, Chicago Title Insurance Company*

Litigation, Mediation, Collaboration – Which Divorce Model is "Right": In this presentation, Theresa Beran Kulat will describe how a couple's choice of divorce process influences the outcome in their case. She will first compare and contrast the three models of dispute resolution used most often in divorce – litigation, mediation and Collaboration. She will then, using some examples based on the new Illinois Marriage and Dissolution of Marriage Act guidelines for maintenance and child support, show the interplay between facts and process. *Theresa Beran Kulat, Esq., Trinity Family Law*

Discovery is Exciting! Be the Indispensable Paralegal: Be ready as we blast through learning what you can do as a paralegal assisting in the discovery process. We will discuss preparation and service of subpoenas, finding people, interviewing clients and witnesses, worrying about requests to admit, drafting interrogatories and requests to produce, responding to interrogatories and requests to produce and more. This session will touch on discovery before administrative agencies as well as state and federal courts. This session is for beginners as well as experienced paralegals. *Caren Mansfield, CLA, ILAP, Baker, Baker & Krajewski LLC*



The IPA has added a charitable aspect to the Fall Education Conference. We will be collecting professional and workplace attire for men and women. By donating your gently used professional clothing you can give someone the confidence to walk into an interview or start their first day on the job with confidence.

Per Bridge to Success' website, this organization enhances employment opportunities for at-risk, low-income, no-income men, women, and young adults by providing high-end interview and workplace appropriate clothing, coupled with a personal stylist and coaching, to build self-confidence through appearance, interview preparation and sense of belonging at the workplace. Learn more about this organization at <http://thebridgetosuccess.org/>.

We will accept all sizes of Fall and Winter professional clothing, shoes and accessories. Your unused items can allow someone the chance to make a life changing first impression. If you have any questions regarding this event, please reach out to the Education Committee at Education@ipaonline.org. Thank you for your contribution. Tax receipts will be provided at the time of donation.

REGISTRATION FORM
The Metropolitan Club
233 South Wacker, Chicago, Illinois

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 for all IPA events (Business Casual). Parking is available at the Traders Parking Garage at 362 S Wells, Southeast from the Willis Tower. The garage has three Entrances: one on the East side of Franklin, one on the North side of Van Buren and another on West side of Wells.

Registration Information: Mailed registration forms must be postmarked on or before October 31, 2015 to avoid paying the Late Registration rate. Beginning November 1, 2015, Late Registration 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 31, 2015. 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 check if you require special accommodations and/or diet restrictions. Please describe your requirements: _____

___ I would like to volunteer to serve as a **PROCTOR** (Proctors are responsible for introducing the speaker, reading some brief announcements, passing out handouts and evaluation forms, overseeing the sign-in/sign-out process, distributing CLE certificates, and thanking the speaker. It is very simple to do, but so very important. If you would like to proctor any of the seminars that you are attending, please indicate here.)

___ **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 5, 2015			
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.
Behind the Scenes at the Illinois Secretary of State	Critical Steps in Creating a Corporate Records and Information Governance Program	Authentication and Legalization Demystified	The Global Entity Life Cycle
Predictive Coding and Analytics: Streamlining the Document Review Process	Cyber Event Trends and Response Tactics	How To...Issuing Citations to Discover Assets in State Court	Capturing Webpages as Evidence: The Risks and Best Practices You Need to Know
Trusting Trusts – Working with Trusts Under Revised Article Nine	Navigating Illinois Long Term Care	Illinois Decanting and Directed Trusts	Exploring the Different Types of Legal Entities That Hold Title to Illinois Real Estate
USPTO Pilot Programs That Every Good Patent Prosecutor Should Know About	Intellectual Property for Non-IP Paralegals: Why People Get So Worked Up Over Something They Cannot Touch	Wizardry in Microsoft Word: Styles & Test Formatting	Litigation, Mediation, Collaboration – Which Divorce Model is "Right"?
Legal Research	Legal Writing: Invaluable Tips to Polish Your Skills	Legal Ethics 2015	Discovery is Exciting! Be the Indispensable Paralegal

IPA MEMBER REGISTRATION FEES

● **FULL DAY (4 sessions)**

- ☐ \$225 IPA Member Registration (Lunch Included)
(Postmarked on or before October 31, 2015) ***BEST VALUE***
☐ \$250 IPA Member beginning November 1, 2015 and On-Site (Lunch Included)

● **HALF DAY (2 sessions)**

- ☐ \$150 IPA Member Registration
(Postmarked on or before October 31, 2015)
☐ Add \$32.50 if attending the Lunch
☐ \$175 IPA Member beginning November 1, 2015 and Day of Event Registrations
☐ Add \$32.50 if attending the Lunch

● **QUARTER DAY (1 session)**

- ☐ \$75 IPA Member Registration
(Postmarked on or before October 31, 2015)
☐ Add \$32.50 if attending the Lunch
☐ \$100 IPA Member beginning November 1, 2015 and Day of Event Registrations
☐ Add \$32.50 if attending the Lunch

NON-MEMBER REGISTRATION FEES

● **FULL DAY (4 sessions)**

- ☐ \$275 Non-Member Registration (Lunch Included)
(Postmarked on or before October 31, 2015) ***GREAT VALUE***
☐ \$325 Non-Member beginning November 1, 2015 and On-Site (Lunch Included)

● **HALF DAY (2 sessions)**

- ☐ \$175 Non-Member Registration
(Postmarked on or before October 31, 2015)
☐ Add \$37.50 if attending the Lunch
☐ \$200 Non-Member beginning November 1, 2015 and Day of Event Registrations
☐ Add \$37.50 if attending the Lunch

● **QUARTER DAY (1 session)**

- ☐ \$100 Non-Member Registration
(Postmarked on or before October 31, 2015)
☐ Add \$37.50 if attending the Lunch
☐ \$125 Non-Member beginning November 1, 2015 and Day of Event Registrations
☐ Add \$37.50 if attending the Lunch

LUNCH (from 12:00 pm – 1:30 pm)

LUNCH SELECTION - If you are attending the lunch, please select an entrée below. Lunch is included with a Full Day registration.

☐ \$32.50 IPA Member, attending Lunch only ☐ \$37.50 Non-Member, attending Lunch only

- ☐ Herb Crusted Rosemary Chicken Breast
☐ Vegetarian Tuscan Risotto

PAYMENT

☐ 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 _____ Security Code _____ Expiration Date _____

Billing Address _____ Billing City _____ Billing State _____ Billing Zip Code _____

Email Address You Would Like Receipt Sent To _____