

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

***2017 FALL EDUCATION CONFERENCE***



*Reflecting on the Past to  
Advance the Future*



***November 1, 2017  
9:00 AM – 5:00 PM Education  
5:00 PM – 7:00 PM 45<sup>th</sup> Anniversary Celebration  
The Palmer House Hilton***

**PLEASE NOTE: SESSIONS WILL RUN FROM 9:00 AM – 5:00 PM  
WITH A TWO-HOUR LUNCH CELEBRATION**

**9:00 am – 10:15 am**

**Business Compliance Basics:** We will walk you through the essentials of what you need know about business compliance. With good strategy and planning, you can reduce or eliminate the risks. This session will include (i) how to successfully manage the three main sources of compliance requirements, (ii) recording-keeping and reporting for corporations and LLCs, (iii) strategies and steps to stay compliant, (iv) non-compliance lessons from case law, (v) important new developments in Delaware law and (vi) the intersection of federal and state securities laws and their reporting requirements. *Tamara Kling, Esq., Government Relations & Regional Attorney, CT Corporation*

**Advanced eDiscovery Using Office 365:** Office 365 is changing the world. Today, these clouds can keep your data more secured, provide eDiscovery features to search, cull and analyze content in-place all the while saving organizations thousands of dollars in hosting fees from 3rd party facilities. Software technologies have to learn how to do in-place discovery where their data resides without making a copy of it, until such time where it is deemed potentially relevant to an investigation. This presentation will provide an overview of the eDiscovery features within Office 365, discuss the most pertinent elements for legal professionals, law firms and eDiscovery vendors that will be supporting the many clients that are migrating to Office 365. Topics include: Supporting the Migration to Office 365, eDiscovery features included, EDRM requirements that are not included and exporting data for an outside review. *Bruce Malter, CEDS, Director of Client Engagement, eTERA Consulting, LLC*

**From the Boulevard to the Slants, The Sensational History of Scandalous, Immoral and Weird Brands and the Application of 15 U.S.C. § 1052(a) Part 2:** In April, 2016, the United States Patent and Trademark Office (“PTO”) filed a petition for a writ of certiorari to the Federal Circuit seeking Supreme Court review of that Court’s decision in *In re Tam*, 117 USPQ2d 1001 (Fed. Cir. 2016), holding the disparagement provision of Section 2(a) of the Lanham Act, 15 USC §1052(a), to be facially unconstitutional as a violation of the Free Speech Clause of the First Amendment. The disparagement provision of the Lanham Act has drawn renewed attention since it was used in June 2014 to revoke the Washington Redskins’ trademark registrations. This petition for certiorari sets the stage for the Supreme Court to review the legality of Section 2(a). 15 U.S.C. § 1052(a) states in part: “No trademark by which the goods of the applicant may be distinguished from the goods of others shall be refused registration on the Principal Register on account of its nature unless it – Consists of or comprises immoral, deceptive, or scandalous matter; or matter which may disparage or falsely suggest a connection with persons, living or dead, institutions, beliefs, or national symbols, or bring them into contempt, or disrepute...”. Mr. Meyers will explore the case history by which the definition of “immoral” has been determined, the differences between “immoral” and “scandalous” brands and evidence used to establish that a candidate brand may disparage and whom it may disparage, and whether the disparage provisions of the Act are invalid under the Free Speech amendment of the U.S. Constitution. He will lead a discussion and Q & A session as well following his presentation. In this continuation, Mr. Meyers will recap the decision and commentary from noted authorities as well as possible additional published decisions post ‘Slants’ reaction and action by the USPTO. *Fred Meyers, IP Solved, LLP*

**The Assessment Appeal Process: Assessment Cycle, Real Estate Tax Burden and the Benefits of Appeals:** Do you know the connection between a property’s assessment and its market value? What makes a strong assessment appeal? If a reduction is achieved, where are the tax savings reflected? In this session, we will explain how real estate taxes are calculated, how the assessment cycle works, and the procedures for appealing your property’s assessment. *Jason Kuether, Paralegal, Golan Christie Taglia LLP*

**Legal Research with Westlaw:** Want to advance your skills in legal research and learn about efficiency tools to help streamline your workflow? This seminar will focus on advanced resources for every stage of your work flow from legal research and public records to the drafting process. Learn how to use tools on Westlaw to gain confidence in your research results. Take a deeper dive into public records to learn how to investigate both people and companies. Learn about tools that save time in your drafting and editing process, including creating a table of authorities within minutes! Leave with a better understanding of how to utilize Westlaw and efficiency tools in your daily workflow. *Jennifer Horkey, J.D., Client Manager, Thomson Reuters*

10:45 am – 12:00 pm

**UCC – All About the Forms:** The importance of properly filing your UCC document cannot be overstated. Even with recent efforts to improve these legal documents, there are still obstacles that present themselves to filers. This session will explore some of these common pitfalls. With a mixture of real life examples and case law the intention is to make those involved in due diligence of ways they can better safeguard their procedures. *Daniel W. Lias, Esq., Transactional Business Consultant, Wolters Kluwer Corporate Legal Services*

**The New Amendments to Federal Rule of Evidence 902:** In this session we will discuss the new additions to Rule 902, which go into effect on December 1, 2017, and what will be required to authenticate electronic records. Will we have more written certifications and less testimony? What types of evidence will be self-authenticating? Are there notice requirements? Is a Facebook screenshot admissible? We will also discuss case law, the committee notes, judicial commentary, expected impact on the legal practice, and more. *Neil P. Johnson, Esq., Golan Christie Taglia LLP*

**The Everchanging Internet: What Companies Need to Know About Brand Protection, Data Security and Regulatory Compliance:** The Internet has become a vital asset of virtually every business but with the positives comes negatives. This presentation will provide attendees with an overview of the various tools available to companies to help protect themselves including rights protection mechanisms for brand owners, data security best practices for companies as well as how companies should address the current regulatory landscape. *Colin T. J. O'Brien, Partridge Partners, PC*

**Title Issues – How Did We Get Here and How Do We Fix Them?:** We will examine the beginnings of title insurance, review the types of policies and endorsements, and discuss the factors that can hide underlying title impediments. We will do a walk-through of the documents and focus on resolving a wide range of title issues. *Jonathan Fay, Underwriting Counsel, Near North National Title*

**Today's 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 we will discuss how they can be utilized in 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 the issues they may face. This session will also discuss the pitfalls of social media to the paralegal. *Sharon Patterson, Legal Assistant Supervisor, Goldberg Kohn Ltd. and Caren Mansfield, CLA, ILAP, Baker, Baker & Krajewski LLC*

2:00 pm – 3:15 pm

**Cybersecurity Risks:** The cybersecurity risks posed to corporations, both domestic and foreign, have been increasing on a yearly basis. Understanding these risks and the accompanying responsibilities from regulators, litigators and business partners is vital for managing a company's IT, security policies, privacy policies and other efforts to mitigate cybersecurity risks. This session will present an overview of the nature of these cybersecurity risks, the responsibilities companies have under the law, and the kinds of steps that can be taken to prepare for how cybersecurity incidents can impact a company. *Fredric E. Roth V, Esq., Thompson Coburn LLP*

**Forensic Collection Procedures to Facilitate Authentication of Electronic Evidence:** The importance of using knowledgeable e-discovery paralegals and forensic professionals to help ensure that you are following best practices in collecting and duplicating electronic data is increasing. Attorneys and paralegals can facilitate the future authentication of electronic evidence by following forensic collection procedures, and this can significantly reduce the likelihood or effectiveness of costly challenges to electronic evidence, or the need to have extra authentication witnesses present at evidentiary hearings or trials. The proposed amendments to Federal Rule of Evidence 902 highlight the importance of utilizing best practices for collection of electronic evidence. Attend this advanced session to expand your knowledge on collection procedures, the process of digital identification, what data can be collected, challenges that are faced, and when you should not self-collect. *John H. Evans, Senior Vice President, Forensic Services, D4 Discovery*

**Why Are You Working So Hard? Master Automation in Microsoft Word:** At its essence, document assembly and automation involve creating templates that can be filled in with specific information needed to create the final document. A template might be an entire document or just a frequently used clause, phrase, or optional paragraph. You can create a custom template based on a particular client or situation. Sounds like a lot of work? It is not! Do you reinvent the wheel every time you start a new document? Do you continue to cut and

paste the same phrase from an agreement or letter? Stop wasting your valuable time! In this session you will learn the basics of document automation in Microsoft Word and how to utilize this time-saving task for your attorneys and firm. *Tom Stephenson, Paralegal, Golan Christie Taglia LLP*

**Estate Planning Basics – Wills vs. Trusts:** Our clients expect their estate planning will cause their property to go to whom they want, the way they want, when they want and that it will minimize the impact of taxes, professional fees and court costs. They also expect their estate planning will help them keep control of their property while they are alive and well and provide for themselves and their loved ones if they become disabled. Traditional estate planning often falls short of some of these goals. We will examine the traditional estate planning process, some of its shortfalls, how modern estate planning overcomes them, and the pros and cons of modern versus traditional estate planning. *Lisa M. Gaspero, Esq., Gaspero & Gaspero*

**Effective Legal Writing for Surviving the Shark-Infested Waters of the Legal Profession:** Nothing speaks more powerfully to a judge than that which is written. Increasingly, judges make decisions solely based upon what the parties submit for consideration rather than entertaining oral arguments. It's an inevitable truth: the outcome of a client's case can hinge entirely and only upon the effectiveness of the attorney's final written product. If you plan on having a long career as a paralegal, effective legal writing is essential. The importance of effective legal writing cannot be understated. Learn how to write more effectively to survive the shark-infested waters of the legal profession. *Nicholas G. Kourvetaris, Esq., SmithAmundsen LLC*

**3:45 pm – 5:00 pm**

**Foundation of a Contract:** Most everyone is involved in contractual agreements of some kind, be it in your legal specialty or personal life. This seminar will be a basic review of a contract, including the formation, categories and standard elements. *Colette Lemke, Paralegal*

**The Benefits of Utilizing the Services of a Licensed Private Investigator:** The workings of a private investigator are often cloaked in mystery and distorted by what we see on television and in movies. Because of formal challenges that can be raised by the opposing party, attorneys and paralegals should not take on the role of evidence gatherer to safeguard against what may be a simple mistake or lack of experience. You could be breaking the law if you tried to be your own investigator and any information obtained might not only be useless but can result in it being used against you. A private investigator can work to serve a summons or subpoena on that elusive defendant, but they can also assist in taking witness statements, conducting surveillance, and collecting evidence. While we will not give away any proprietary secrets, we will discuss some general investigative techniques and public resources that are available, and what it might take to collect the right evidence needed for the attorney to review and build their case. Learn what privacy considerations should be factored in and what initial information would be helpful to the investigator if, for example, you had a case involving revenge porn, cyber-stalking, or bullying. *Michael Colella, M.S., L.P.D., Licensed Private Detective, Chicago Intel Agency, Ltd.*

**Excel Power Tips:** You know you are underutilizing this software. Come get a productivity boost! This advanced session will dive deeper into creating the charts and graphs that are always a necessity in a law firm. Build your confidence with features like VLookup (vertical lookup), HLookup (horizontal lookup), and Pivot Tables. Master more tips to make you the undisputed power user at your company. Attend this session and make your usage of Excel even more powerful and efficient. *Lucy Rudyka, IT Trainer, McDermott Will & Emery LLP*

**“Beaver” Doesn’t Live Here Anymore...Estate Planning for Today’s “Modern Family”:** In this session we will discuss estate planning for blended families, same-sex couples, same-sex couples with adopted or biological children, older couples who have recently become parents and single-parent families. *Karen Mills, Esq., Strohschein Law Group, LLC*

**Today's Ethics (REPEAT SESSION):** 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 we will discuss how they can be utilized in 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 the issues they may face. This session will also discuss the pitfalls of social media to the paralegal. *Sharon Patterson, Legal Assistant Supervisor, Goldberg Kohn Ltd. and Caren Mansfield, CLA, ILAP, Baker, Baker & Krajewski LLC*





# Happy Paralegal Day!



*Keynote Speaker  
Former U.S. Prosecutor  
Renato Mariotti*

In 2017, the IPA celebrates its 45th Anniversary. To celebrate this momentous occasion, as well as to recognize Paralegal Day in Illinois, the IPA presents former Federal Prosecutor and frequent contributor on CNN, MSNBC, Politico and Newsweek **Renato Mariotti**. Mr. Mariotti is an accomplished trial attorney and will be speaking on **Tools of a Federal Investigation**. Subpoenas, search warrants, and grand juries are just some of the tools of a federal investigation. Mr. Mariotti will provide his expert insight and understanding of what makes a federal investigation tick, as illustrated by current events.

During the 2-hour luncheon, past IPA Presidents and Chairpersons will be recognized for long-standing contributions to the IPA.



To continue the celebration, an evening of networking, appetizers, and cocktails will be held immediately following the close of the Education Conference. All Full Day registrants will receive one drink ticket with their registration materials; all other attendees are encouraged to attend and can register for the evening portion at an additional cost of \$15 for members/\$25 for nonmembers, which will also include one drink ticket. Additional drinks can be purchased on a cash basis.

**REGISTRATION FORM**  
**The Palmer House Hilton**  
**17 East Monroe Street, 3<sup>rd</sup> Floor, Chicago, Illinois**

Please consider the environment and assist the IPA in going green by registering online at [www.ipaonline.org](http://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/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). Self parking is available at the parking garage partner facility located at 55 East Monroe Street, directly across the street from the Palmer House Hilton. The garage can be accessed from either Monroe Street (west bound traffic) or Adams Street (east bound traffic). Parking tickets can be validated by IPA for a day rate of \$22. Valet Parking with unlimited in and out privileges is available at the Palmer House Hilton 24 hours a day curbside at both the Monroe Street and Wabash Avenue entrance. Valet parking tickets can be validated by IPA for a day rate of \$29.

**Registration Information:** Mailed registration forms must be postmarked on or before October 27, 2017 to avoid paying the Late Registration rate. Beginning October 28, 2017, Late Registration rates apply. Registration fee includes attendance, handout materials, and breaks. Lunch and Evening Festivities 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 27, 2017. 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.

<b>SEMINAR REGISTRATION FORM</b> <i>Please Check or Circle the Educational Seminars You Will Attend</i> <b>Wednesday, November 1, 2017</b>			
9:00 a.m. – 10:15 a.m.	10:45 a.m. – 12:00 p.m.	2:00 p.m. – 3:15 p.m.	3:45 p.m. – 5:00 p.m.
Business Compliance Basics	UCC – All About the Forms	Cybersecurity Risks	Foundation of a Contract
Advanced eDiscovery Using Office 365	The New Amendments to Federal Rule of Evidence 902	Forensic Collection Procedures to Facilitate Authentication of Electronic Evidence	The Benefits of Utilizing the Services of a Licensed Private Investigator
From the Boulevard to the Slants, The Sensational History of Scandalous, Immoral and Weird...	The Everchanging Internet: What Companies Need to Know About Brand Protection, Data Security...	Why Are You Working So Hard? Master Automation in Microsoft Word	Excel Power Tips
The Assessment Appeal Process	Title Issues – How Did We Get Here and How Do We Fix Them?	Estate Planning Basics – Wills vs. Trusts	"Beaver" Doesn't Live Here Anymore...Estate Planning for Today's "Modern Family"
Legal Research with Westlaw	Today's Ethics	Effective Legal Writing for Surviving the Shark-Infested Waters of the Legal Profession	Today's Ethics (REPEAT SESSION)

## IPA MEMBER REGISTRATION FEES

### • FULL DAY (4 sessions)

\_\_\_ \$250 IPA Member Registration (Lunch and Evening Festivities Included)  
(Postmarked on or before October 27, 2017) \*\*\*BEST VALUE\*\*\*

\_\_\_ \$275 IPA Member beginning October 28, 2017 and On-Site (Lunch and Evening Festivities Included)

### • HALF DAY (2 sessions)

\_\_\_ \$150 IPA Member Registration

(Postmarked on or before October 27, 2017)

\_\_\_ Add \$40.00 if attending the Lunch

\_\_\_ Add \$15.00 if attending the Evening Festivities

\_\_\_ \$175 IPA Member beginning October 28, 2017 and Day of Event Registrations

\_\_\_ Add \$40.00 if attending the Lunch

\_\_\_ Add \$15.00 if attending the Evening Festivities

### • QUARTER DAY (1 session)

\_\_\_ \$75 IPA Member Registration

(Postmarked on or before October 27, 2017)

\_\_\_ Add \$40.00 if attending the Lunch

\_\_\_ Add \$15.00 if attending the Evening Festivities

\_\_\_ \$100 IPA Member beginning October 28, 2017 and Day of Event Registrations

\_\_\_ Add \$40.00 if attending the Lunch

\_\_\_ Add \$15.00 if attending the Evening Festivities

## NON-MEMBER REGISTRATION FEES

### • FULL DAY (4 sessions)

\_\_\_ \$300 Non-Member Registration (Lunch and Evening Festivities Included)  
(Postmarked on or before October 27, 2017) \*\*\*GREAT VALUE\*\*\*

\_\_\_ \$350 Non-Member beginning October 28, 2017 and On-Site (Lunch and Evening Festivities Included)

### • HALF DAY (2 sessions)

\_\_\_ \$175 Non-Member Registration

(Postmarked on or before October 27, 2017)

\_\_\_ Add \$45.00 if attending the Lunch

\_\_\_ Add \$25.00 if attending the Evening Festivities

\_\_\_ \$200 Non-Member beginning October 28, 2017 and Day of Event Registrations

\_\_\_ Add \$45.00 if attending the Lunch

\_\_\_ Add \$25.00 if attending the Evening Festivities

### • QUARTER DAY (1 session)

\_\_\_ \$100 Non-Member Registration

(Postmarked on or before October 27, 2017)

\_\_\_ Add \$45.00 if attending the Lunch

\_\_\_ Add \$25.00 if attending the Evening Festivities

\_\_\_ \$125 Non-Member beginning October 28, 2017 and Day of Event Registrations

\_\_\_ Add \$45.00 if attending the Lunch

\_\_\_ Add \$25.00 if attending the Evening Festivities

### LUNCH (12:00 pm – 2:00 pm)

*Please note the new extended time for lunch*

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

\_\_\_ \$40.00 IPA Member, attending Lunch only

\_\_\_ \$45.00 Non-Member, attending Lunch only

\_\_\_ Stuffed Free-Range Chicken Breast (garlic, sun dried tomatoes, arugula, mozzarella cheese) Gluten Free Option

\_\_\_ Vegetarian Rigatoni Primavera (seasonal vegetables, garlic, basil, roasted tomatoes, aged parmigiano-reggiano)

### EVENING FESTIVITIES (5:00 pm – 7:00 pm)

*Please note the rates below are for those who are attending half day or quarter day*

\_\_\_ \$15.00 IPA Member, attending Evening Festivities

\_\_\_ \$25.00 Non-Member, attending Evening Festivities

**PAYMENT**

**If paying by check, please copy and mail all three pages to: IPA, PO Box 452, New Lenox, IL 60451-0452**

**If paying by credit card, please scan and email all three pages to [IPA@ipaonline.org](mailto:IPA@ipaonline.org)**



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

\_\_\_ CREDIT CARD. 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 \_\_\_\_\_

