

The Philadelphia Association of Paralegals'

Education Conference

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Current Economic Climate**

Friday, November 13, 2009 • 8 AM to 5 PM

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An Invitation from the President

It gives me great pleasure to present to you The Philadelphia Association of Paralegals' Annual Education Conference.

The Education Conference is an all-day event designed to offer Philadelphia metropolitan area paralegals, paralegal students and attorneys an opportunity to increase their knowledge base, explore new areas of the law, and network with their peers. Each year the Education Committee offers something new and exciting. This year, they are offering a Professional Development session. Like all of the sessions, it will be packed with valuable information. In addition to the new session, you will see the return of the Pro Bono session.

As always, I encourage you to visit with all of our vendors so that you can obtain information regarding the type of services they offer. I ask that you remember to utilize the vendors for all of your professional needs.

I want to thank everyone on the Education Committee for their hard work and commitment in planning this conference.

I hope you will attend the Conference and invite your friends and colleagues to join you at the Conference. Please contact us if you have any questions at 215-255-8405.

Lyndora Patterson Tiller

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Acknowledgements

Unless you have participated on the Education Committee, you cannot begin to imagine how much planning, coordination, time and effort it takes to put together our annual conference. This year's conference would not be possible without the help of the following individuals: Sherry Barag, Judith Bardsley, Shannon Braun, Mandi Bucceroni, Jamerra Cherry, Karen Daemer, Sharon DeNofa, R.P., Maryanne Ebner, Terri Enright, Christine Flynn, Tausha Major, Renee Mazzeo, Kathy Merlino, Judy Stouffer, R.P., and Alison Worley. To each of you, my sincerest thanks. As often as possible, our Board Members also participated, including Lyndora Patterson Tiller and Diana Cook. My thanks to you as well.

I would also like to thank our Keynote Speaker, Alan B. Epstein, and all of this year's speakers for agreeing to share their invaluable time and wisdom with us. This year's Conference promises to be the most exciting yet, so don't miss out!

And last, but not in the very least, I offer PAP's deepest gratitude to our sponsors, without whom our conference simply would not be possible. In no particular order, this year's confirmed sponsors and vendors are:

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I would be remiss without offering a distinctive, heartfelt thanks to Mark Viggiano for not only his time and talent, but also his endless patience. Mark is always ready, willing and able to meet our needs, and I'm sure you will agree that Mark's cover design this year is truly outstanding; he turned our simple suggestion into a masterpiece. Thank You Mark!

PAP also extends its ongoing thanks to Reliable Copy Service for the printing of this year's Education Conference Brochure. To everyone at Reliable, we are deeply grateful.

Babette Pace
Education Committee Chairperson

ECONOMIC DAMAGES ANALYSIS

earnings growth depreciation **worklife**
deductions pension survival damages
reduction to present value household services
personal maintenance employee stock options
cost of capital hedonic damages Schedule C
McClinton v. White life-care plan front pay **front pay**
future medical costs life expectancy lost profits
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— Guest Speaker —

Alan B. Epstein

Alan B. Epstein is the chair of Spector Gadon & Rosen's Employment Law Practice Group. A 1969 graduate of Temple University School of Law, he has litigated complex claims before courts throughout the United States and is admitted to practice before the state and federal courts of Pennsylvania, the United States Court of Appeals for the Third, Fifth and Ninth Circuits, and the United States Supreme Court.

Mr. Epstein concentrates his practice in civil litigation in state and federal courts, with special emphasis on litigating claims and giving transactional advice in the areas of employment rights, civil rights, and constitutional torts. He also represents professionals and organizations of professionals in the many unique problems that arise in the practice of law, medicine, accounting, insurance, real estate, stockbrokerage, pharmacy, and architecture. He is a frequent lecturer in the areas of employment law and professional responsibility, and has been elected to Fellowship in the prestigious College of Labor and Employment Lawyers. He has been selected as one of the *Best Lawyers in America* in the publication of that name for over ten years and has been selected as a top 100 *Superlawyer* in Philadelphia, Pennsylvania. He has also been selected as one of the nation's Top 500 Litigators and Top 500 Plaintiff's Lawyers by the publication *Lawdragon* in 2006 and 2007 respectively. He is an active member of the National Employment Lawyers Association, and a volunteer mentor for the Employment Litigation Panel of the United States District Court for the Eastern District of Pennsylvania. He is a national leader in the American Inns of Court movement and is an active member of the Philadelphia, Pennsylvania and American Bar Associations and a member of the American Association for Justice.

In the context of significant litigation in the employment law area, Mr. Epstein is well known for his participation in high profile litigation for individuals and corporate entities (including the representation of a young, HIV-positive attorney against a prestigious Philadelphia law firm that received national attention because of the award-winning film *Philadelphia* starring Tom Hanks and Denzel Washington and daily coverage of the trial by Court TV and Cable News Network.) He frequently represents local and national sports figures, broadcast personalities, and officers and directors of large national corporations who require his service in connection with litigation and negotiation of their contracts of employment.

Mr. Epstein was also the founder and President/CEO of JUDICATE, The National Private Court System, a company coordinating private dispute resolution services utilizing approximately 700 former judges throughout the United States and its territories. He is a frequent lecturer in the area of alternative dispute resolution, and serves as a mediator and arbitrator by private appointment and through certification by state and federal courts.



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**The Philadelphia Association of Paralegals'
Education Conference
Friday, November 13, 2009**

SCHEDULE OF EVENTS

Continental Breakfast: 8:00 A.M. – 9:00 A.M.

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Session I: 9:00 A.M. – 10:15 A.M.

Morning Break: 10:15 A.M. – 10:45 A.M.

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Session II: 10:45 A.M. - Noon

* * * * *

Luncheon: 12:00 Noon - 2:00 P.M.

Keynote Address by Alan B. Epstein

Main Ballroom

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Session III: 2:00 P.M. – 3:15 P.M.

Afternoon Break: 3:15 P.M. – 3:30 P.M.

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Exhibitor Raffles: 3:15 P.M. – 3:30 P.M.

Session IV: 3:30 P.M. – 4:45 P.M.

* * * * *

Exhibit Area: 8:00 A.M. – 4:45 P.M.

* * * * *

Happy Hour: 5:00 P.M. – 7:00 P.M.

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Seminar Events

Session I

9:00 a.m. to 10:15 a.m.

FAMILY LAW

Seminar I-A

Pennsylvania Supreme Court Domestic Relations Procedural Rules Committee Update; and Child and Spousal Support Calculations and Modifications in a Tough Economy

The Pennsylvania Supreme Court Domestic Relations Procedural Rules Committee reviews legislation and monitors court decisions to ensure that the rules conform to developments in the law as well as to the realities of family law practice. In the first part of this session, Ms. Verber, an active member of this Committee, will discuss recent and proposed changes in the procedural rules related to family law matters and will provide updates, which may impact the rules going forward.

The second part of this session will be a discussion by Ms. Braun where she will cover and discuss how child and spousal support awards and obligations are calculated, and what factors affect the support calculation. Ms. Braun will also answer the question of what warrants a petition to modify support and will discuss how the courts are adjusting support awards and obligations due to today's difficult and tough economy.

1.25 NFPA CLE CREDIT PENDING

Ann G. Verber, Esquire

Obermayer Rebmann Maxwell & Hippel LLP

Ms. Verber is of Counsel with Obermayer Rebmann Maxwell & Hippel LLP and is a member of the firm's Litigation Department. She concentrates her practice in the area of family law, where she handles all phases of the negotiation and litigation of domestic relations cases, including divorce, custody, support, alimony, property distribution, prenuptial agreements, asset protection and related issues. Ms. Verber joined Obermayer in 1983, and was named the firm's first woman partner in 1987. She currently is of Counsel to the firm.

Ms. Verber is a Fellow of the American Academy of Matrimonial Lawyers, where she served as Co-Chair of the Pennsylvania Chapter's Committee on Admissions, and is a Master Member of the Nicholas Cipriani Inn of Court for Family Law.

Ms. Verber served as Chair of the Family Law Section of the Philadelphia Bar Association, Member of Council of the Family Law Section of the Pennsylvania Bar Association, Member of the Philadelphia Bar Association's Commission on Judicial Selection and Retention, Co-Chair of the Philadelphia Family Court's Task Force on Custody, Member of the Pennsylvania Supreme Court Domestic Relations Procedural Rules Committee, and Member of the Board of the Philadelphia Bar Education Center. She is a member of the American, Pennsylvania and Philadelphia Bar Associations and their Family Law Sections.



Shannon Braun, Paralegal
Schnader Harrison Segal & Lewis LLP

Ms. Braun is a paralegal in the Family Law Department of Schnader Harrison Segal & Lewis LLP, Philadelphia. She received her B.S. in Law and Justice from The College of New Jersey. She is co-chair of the Family Law Committee for The Philadelphia Association of Paralegals. Prior to joining Schnader Harrison, Shannon worked for the Chester County Domestic Relations Section for six years. Throughout her tenure with the Domestic Relations Section, she held several positions including a support Enforcement Officer, Enforcement Specialist and a Conference Officer.

LEGAL WRITING

Seminar I-B

Improving Legal Writing Skills for Job Retention & Promotion in Today's Economy

Senior paralegals and attorneys at law firms large and small all can agree that the value of a paralegal is much greater to that firm when the paralegal's experience and commitment are combined with superior writing skills. The paralegal that can professionally handle standard business correspondence and competently fit a legal form to the client's case is a very valuable asset to any busy law firm. But the paralegal that can persuade, reassure, and inspire confidence and trust in a client with his/her writing is an even more valuable asset. And still more valuable is the paralegal that can insightfully and creatively use simple, but expressive language to organize and analyze complicated legal concepts and scenarios. The value of a paralegal that possesses such superior writing skills is directly proportional to the degree of job security and the amount of compensation that he/she can command. This workshop will focus on practical tips for improving your legal writing skills in two client-centered contexts: correspondence and private legal documents (i.e., contracts, wills, etc.).

1.25 NFPA CLE CREDIT PENDING

Glenn Barnes, Esquire
Associate Professor, Legal Studies
Peirce College

Glenn Barnes, Esquire, an Associate Professor of Legal Studies at Peirce College, graduated cum laude with a BA in English from Cornell University in 1981. He received his *Juris Doctor* degree from Suffolk University School of Law in 1985, where he was awarded the *Am Jur* Award in Tort Law. Professor Barnes has been a practicing attorney since 1985, and has his own law practice concentrating in the areas of estate planning and estate administration, family law, corporate and employment law, and civil litigation including personal injury and medical malpractice. Professor Barnes also conducts business training workshops in Philadelphia and New York in various areas of employment law. His clients have included Robert A. M. Stern Architects, the American Society of Mechanical Engineers (ASME), and the U.S. Postal Service. He is a published writer, was a 2002 Pew Fellowships in the Arts Finalist in poetry, and received the Philadelphia *City Paper's* First Place prize for his poetry in 2002. Professor Barnes has been teaching legal studies since 1994 and has been a member of the Peirce College legal studies faculty since May 2003. In 2008, he was awarded Peirce College's highest faculty honor, the distinguished *Hamilton Award for Academic Excellence and Integrity*.



ESTATES & TRUST – PART I

Seminar I-C

Inheritance Tax Preparation – A General Overview

This will be the first workshop of a two-part session in the area of Inheritance Tax Preparation. During this session, Mr. Martin will present an overview of the Pennsylvania Inheritance tax return, which will include specific instructions for the preparation of Schedules A through J. In addition, the session will provide a thorough analysis of the treatment of probate and non-probate property. Mr. Martin will also offer guidance concerning unique deductions and methods to determine whether an expense item is deductible. Finally, the session will conclude with discussions on common mistakes and pit falls to avoid when preparing an Inheritance tax return.

1.25 NFPA CLE CREDIT PENDING

Craig W. Martin, Sr.

Tax Account Collections Manager/Administrative Officer III

Pennsylvania Department of Revenue, Bureau of Collections and Taxpayer Services

Craig W. Martin, Sr. is the Tax Account Collections Manager and Administrative Officer III of the Pennsylvania Department of Revenue, Bureau of Collections and Taxpayer Services, where he has been since 1998. He is responsible for managing the Philadelphia Inheritance Tax Office of the Pennsylvania Department of Revenue, Bureau of Collections and Taxpayer Services. The Administrative Officer is responsible for managing the office and exercising broad supervision over the Tax Examiner Supervisor, Tax Examiners and Clerical Support Staff. Prior to his current role, Mr. Martin was the Chief of Collections of the Pennsylvania Department of Revenue where he managed Tax Account Collections Supervisors and Tax Account Collection Technicians for collections and taxpayer services. Mr. Martin received his Bachelors degree from Temple University and also received additional training from the Bucknell University Advanced School of Banking and New Jersey School of Business.

INTELLECTUAL PROPERTY & RISK MANAGEMENT FOR PARALEGALS

Seminar I-D

Risk Management Issues for Non-Attorneys

The wording “risk management” often conveys a negative connotation. Instead “risk management” should be considered a prudent, positive and proactive approach to mitigating potential losses and damages. During this presentation, Mr. Paradise will discuss Risk Management issues for non-lawyers and the role that non-lawyers can play in loss prevention and ethics compliance. The subject matter that this presentation will cover will include conflicts, confidentiality and client communications. Also, this workshop will offer suggestions on how to handle and deal with disreputable, untrustworthy and difficult clients.

1.25 NFPA CLE CREDIT PENDING

Thomas Paradise, Esquire
Fox Rothschild LLP

Thomas Paradise, Esquire, serves as General Counsel for Fox Rothschild LLP. As General Counsel, his responsibilities include the development and implementation of risk management programs and policies; management of professional liability and insurance issues; performance of ombudsman duties on behalf of the firm; presentation of seminars to the attorneys and staff throughout the year on ethics-related topics and best practice concepts; counseling to the Executive Committee on policies and procedures; providing Risk Management assistance to the firm’s 15 offices. Prior to his appointment as General Counsel, Mr. Paradise served as Chair of the Professional Liability Defense Group. His practice involved a broad range of litigation matters, including legal malpractice defense, personal injury, medical malpractice and commercial litigation. Mr. Paradise received his Juris Doctor degree from Temple University School of Law and he received his Bachelor of Arts from University of North Carolina, Charlotte. He is admitted to practice in Pennsylvania and New Jersey. Currently he is a member of the American Bar Association, as well as the Pennsylvania, Philadelphia and Camden County Bar Associations.



Session II

10:45 a.m. to 12:00 p.m.

PRO BONO

Seminar II-A

Mortgage Foreclosures

This session will describe in detail the Residential Mortgage Foreclosure Diversion Pilot Program, which was established by the Philadelphia Court of Common Pleas Joint General Court Regulation No. 2008-1 in April 2008, and will include how the Diversion Program has altered the usual foreclosure litigation process. This Program has offered hundreds of homeowners an opportunity to negotiate to save their homes from foreclosure. The roles of housing counselors, volunteer attorneys for homeowners, volunteer paralegals, lenders' attorneys, judges pro tem, and court staff will be explained, with particular emphasis on the support provided by volunteer paralegals who conduct client intake at court sessions. In addition, the session will also address conflict issues that affect volunteers from law firms, which represent banks and mortgage companies.

Time will be spent discussing mortgages in general, as well as options available to homeowners to continue paying their mortgages and thus avoid foreclosure. This session will touch upon the interplay between the Diversion Program and foreclosure defense litigation and explain what happens if the foreclosure proceeds to sheriff sale. Ms. Saah, one of our two esteemed speakers for this session, will explain how Philadelphia VIP, the City's premier pro bono referral agency, provides other volunteer referral services, i.e., estate administration, quiet title litigation, addressing property tax liens, and providing assistance in filing for divorce. Participants will also learn about both Pennsylvania and federal programs aimed at stemming the tide of foreclosures and the success of the diversion program in saving homes in Philadelphia.

1.25 NFPA CLE CREDIT PENDING

Andrea Saah, Esquire
Philadelphia VIP

Andrea V. Imredy Saah is a staff attorney at Philadelphia VIP and works with VIP's homeownership, probate, non-profit, and small business clients. She joined VIP in November 2008 after practicing estates and trusts law for six years. Prior to receiving her J.D. from the University of Maryland School of Law in 1997, Andrea obtained a Master's degree from the School for International Training. Her professional experience includes working with the Institute for Community Economics on low-income community land trust finance and development, the Campaign for Peace and Democracy on international human rights advocacy, and the Johns Hopkins School of Public Health on international AIDS research.

Marie Elizabeth DeCarlo
Senior Paralegal
Pepper Hamilton

Ms. DeCarlo is a senior paralegal in the Philadelphia office of Pepper Hamilton LLP and a member of the Firm's Corporate and Securities and Real Estate Practice Groups. She has 24 years experience as a corporate and securities transactional paralegal, working in the area of mergers and acquisitions, financing, and real estate transactions. In addition, she has significant experience with Section 16 filings and UCC-related searches and filings. Ms. DeCarlo earned her paralegal certificate from Penn State. She has been with the firm since 1997 and was formerly a paralegal with Dilworth Paxson LLP from 1985 until 1997 in its Corporate Securities and Finance Practice Groups.



LITIGATION

Seminar II-B

The Benefit and Downside of Social Networking Sites

This session will consist of a panel discussion on social networking sites. The panel will provide a general background and overview of the various social networking sites such as MySpace, Facebook, LinkedIn and Twitter, and then the panel will proceed to go over the benefits and advantages of these sites for paralegals. The panel will review how information is categorized and sorted on each site. Also, the panel will discuss types of information that is contained in an individual's profile and will identify where certain information can be located or found. Each site sets forth its own company guidelines, and the panel will also review the types of activities and/or content, which is permitted or not permitted in its respective site as well as disclosing the requirements for release of information and records. The panel will assess, identify and discuss specific legal issues that may arise, which a search of a social networking site could uncover certain information to resolve the issue at hand. In addition, the panel will suggest various scenarios and situations, which a paralegal may encounter within their daily work that employing one of the sites may become beneficial to the case and/or research project.

The panel will also review and discuss the use of documents from social networking sites as well as the presentation of evidence at the time of mediation, arbitration or trial (i.e., what information is admissible). A review of recent federal and state cases involving use of documents from social networking sites will be addressed as well as the ethical issues concerning the use of such documents.

1.25 NFPA CLE CREDIT PENDING

Litigation Roundtable Participants

Gina F. Rubel, Esquire
Chief Executive Officer
Furia Rubel Communications, Inc.

Gina F. Rubel is founder of Furia Rubel Communications and has worked in depth with the media and public relations for over two decades. She has presented keynote and CLE presentations across the country. She is a graduate of Drexel University and Widener University School of Law.

Dan Giancaterino, MS
Education Services Manager
Jenkins Law Library

Dan Giancaterino received his MS from Drexel University and is currently working at Jenkins Law Library. Currently, he teaches hands-on Web-based continuing legal education classes. He has presented extensively at bar association meetings and well as non-profit and educational organizations.

Kimberly A. Walker
Litigation Paralegal
Berger & Montague, P. C.

Kimberly A. Walker has been a litigation paralegal for 27 years and she serves as the Chair for PAP's Technology Committee. Ms. Walker has written extensively on technology issues, particularly focusing on online sources of information and networking.

David Freeman, JD
Community College of Philadelphia
Assistant Professor

David Freeman is an assistant professor of Social Science at Community College of Philadelphia (CCP) and has served as a legal aid attorney, a prosecutor and a public defender. As a private attorney, he represented individual, corporate and governmental bodies before federal and state courts.



ESTATES & TRUST – PART II

Seminar II-C

Inheritance Tax Preparation – Advanced Tax Issues

This will be the second workshop of a two-part session in the area of Inheritance Tax Preparation. During this session, Mr. Martin will present more complex issues that may arise in the preparation of Form REV-1500, which will include the computing of life estates and preparing arguments for compromise tax offers. Also, Mr. Martin will cover the treatment of sole-use spousal trusts and the election to pay tax on the remainder interest. He will also identify how to determine what documents to attach to the return to support valuations, certain deductions and compromise tax arguments. In addition, the session will include a discussion on the preparation of an Appeal to the Pennsylvania Department of Revenue, Board of Appeals and the preparation of a Protest to Orphans' Court. Lastly, he will include a discussion on the do's and don'ts of filing an Inheritance Tax return.

1.25 NFPA CLE CREDIT PENDING

Craig W. Martin, Sr.

Tax Account Collections Manager/Administrative Officer III

Pennsylvania Department of Revenue, Bureau of Collections and Taxpayer Services

Craig W. Martin, Sr. is the Tax Account Collections Manager and Administrative Officer III of the Pennsylvania Department of Revenue, Bureau of Collections and Taxpayer Services, where he has been since 1998. He is responsible for managing the Philadelphia Inheritance Tax Office of the Pennsylvania Department of Revenue, Bureau of Collections and Taxpayer Services. The Administrative Officer is responsible for managing the office and exercising broad supervision over the Tax Examiner Supervisor, Tax Examiners and clerical support staff. Prior to his current role, Mr. Martin was the Chief of Collections of the Pennsylvania Department of Revenue where he managed Tax Account Collections Supervisors and Tax Account Collection Technicians for collections and taxpayer services. Mr. Martin received his Bachelors degree from Temple University and also received additional training from the Bucknell University Advanced School of Banking and the New Jersey School of Business.

INTELLECTUAL PROPERTY

Seminar II-D

The Paralegal's Role in a Busy Trademark Practice

As commerce becomes more international, businesses are increasingly interested in securing trademark protection throughout the world. As a result, Trademark Practitioners' workloads are increasing exponentially as businesses are seeking global trademark protection. Since attorneys tend to rely heavily upon their paralegals to manage the various Trademark prosecution efforts, Ms. Frandsen will offer suggestions, hints and tips on how to effectively and efficiently manage working with foreign associates, advising clients on the proper Trademark use as well as use of Trademark Notice symbols, i.e., ®, ™ and ℠, assisting in inter-parties proceedings, drafting cease and desist letters, and assisting in due diligence efforts with mergers and acquisitions.

1.25 NFPA CLE CREDIT PENDING

Nancy R. Frandsen, Esquire
Woodcock Washburn LLP

Nancy R. Frandsen is a partner at Woodcock Washburn. Her practice focuses on trademarks, copyrights, unfair competition, trade dress, cyberpiracy and domain name disputes. For over 20 years, Ms. Frandsen has enjoyed guiding clients not only through the core areas of trademark and copyright clearance, worldwide registration, maintenance, and enforcement before the federal courts and the Trademark Trial and Appeal Board, but also through the more complex areas of the practice, including dilution, fair use, comparative advertising and the DMCA. Ms. Frandsen's in-depth knowledge of her clients' businesses, from individual entrepreneurs to major corporations, has enabled her to support and advance their unique objectives and goals. As a result, Ms. Frandsen has earned recognition in *Chambers USA: America's Leading Lawyers for Business* as "Leaders in Their Field" in the area of intellectual property law.

Ms. Frandsen received her J.D., cum laude, from Temple University Beasley School of Law, and her B.A. from Ohio University. She is co-author of *What the General Practitioner Should Know About Trademarks and Copyrights* (6th Ed), published by ALI-ABA. Other published articles have appeared in both local and national publications on subjects such as trademark searching, product configuration in the Third Circuit, the federal right to copy, bad faith litigation, copyright remedies and the protection of nonverbal rights under trademark and unfair competition law. She has also lectured on trademarks and trade dress for the American Law Institute, Pennsylvania Bar Institute, Temple University and the Philadelphia Intellectual Property Law Association. Ms. Frandsen is a member of the Philadelphia Chapter of the Copyright Society of the U.S.A. (Chair, 2001-2003), the American Bar Association's Sections on Intellectual Property and Litigation, the Philadelphia Intellectual Property Association, the International Trademark Association (Trade Dress Image Library Subcommittee) and is on the Intellectual Property Advisory Committee for the Pennsylvania Bar Institute.



Session III

2:00 p.m. to 3:15 p.m.

TECHNOLOGY

Seminar III-A

Social Networking Sites & Its Influence on Your Case

Today's online social networking is encouraging new ways to communicate and share information amongst people who share common interests and/or activities, or who are interested in exploring the interests and activities of others. Millions of people are participating in these online social networking Web sites such as MySpace, Facebook, LinkedIn and Twitter. This session will provide tips on how to use social media and how paralegals can use these sites to get results in their work. Unfortunately, some people are also misusing these sites and are posting inappropriate content, comments and/or pictures. This session will also include the steps one should take to ensure that you, your firm and/or employer are not embarrassed by any content that is NSFW (Not Safe For Work).

In addition, this session will set forth ways that paralegals can utilize these sites to help succeed in this current economic climate. Mr. Giancaterino will demonstrate ways to utilize the sites, MySpace, Facebook, LinkedIn and/or Twitter to promote your skills and experiences. Lastly, he plans to cover and review some of the best employment Web sites for paralegals.

1.25 NFPA CLE CREDIT PENDING

Dan Giancaterino, MS
Education Services Manager
Jenkins Law Library

Dan Giancaterino received his MS in 1989 from Drexel University. He joined the staff at Jenkins Law Library in October 2000 and now teaches nine (9) hands-on, Web-based Continuing Legal Education classes. He is a regular contributor to Jenkins' Weblog (<http://blog.jenkinslaw.org/>).

Mr. Giancaterino is a frequent presenter at meetings hosted by county bar associations, as well as organizations such as CIGNA, Community College of Philadelphia, Community Legal Services, Dispute Resolution Institute, Garden State Alliance of Paralegal Associations, Greater Philadelphia Law Library Association, Institute for Paralegal Education, Municipal Court of Philadelphia, PALINET library network, Pennsylvania Bar Institute, Pennsylvania Library Association, Pennsylvania Workers' Compensation Judges, the Philadelphia Association of Paralegals, Philadelphia Daily News, and SEPTA.

On many occasions Mr. Giancaterino has discussed Web searching on *The Michael Smerconish Morning Show*, *The Glenn Beck Program*, and *Bill O'Reilly's Radio Factor* on *The Big Talker*, WPHT 1210 AM.

He is also an Adjunct faculty member at Drexel University and a contributing editor to the popular search blog ResourceShelf (<http://resourceshelf.com>).

EMPLOYMENT LAW

Seminar III-B

Hot Topics in Labor and Employment Law

As the workplace environment evolves due to the global economic climate, both employers and employees are encountering various difficulties in the workplace, which subsequently cause changes with respect to the legal issues facing employment law practice. This session is designed to provide paralegals with an overview of recent employment law developments. In addition, Ms. Barbieri will cover discrimination cases dealing with gender identity, religious discretion, association discrimination and disability discrimination. Her presentation will also include information concerning ADA Amendments Act of 2008. She will cover and review the Employee Free Choice Act as well as different types of Leaves of Absence, i.e., Family Medical Leave Act (“FMLA”) and New Jersey Paid Leave. Lastly, Ms. Barbieri will discuss the laws relating to workplace bullying.

1.25 NFPA CLE CREDIT PENDING

Catherine T. Barbieri, Esquire
Fox Rothschild LLP

Ms. Barbieri is a management-side employment litigator who represents clients in the full range of employment matters, including discrimination suits (ADA, ADEA, FMLA, Title VII, Section 1981), wrongful termination suits, restrictive covenant litigation, Sarbanes-Oxley Act discrimination complaints, counseling and litigation avoidance, regulatory compliance and reductions-in-force. Ms. Barbieri has been lead counsel in a number of reported cases, including colleges and universities regarding student disability and harassment issues, and represents institutions of higher learning in discrimination litigation. Her leadership roles within the firm include Hiring Partner; Chair, Recruitment Committee; and Member, Diversity Committee.

Currently, Ms. Barbieri serves as Vice Chair for the Board of Trustees of the Women’s Law Project and has lectured at numerous continuing education seminars for human resource professionals and accountants. She is the author of Fox Rothschild’s FMLA Blog, which discusses changes to the Family and Medical Leave Act (FMLA) and tracks the developments that employers and human resource professionals need to know to determine how the law will affect their businesses and their employees. View her blog at (<http://fmla.foxrothschild.com/>).



ETHICS – ELDER ABUSE I

Seminar III-C

Every year, tens of thousands of elderly Americans are abused in their own homes, in relatives' homes, and even in facilities responsible for their care. Today, elder abuse reporting laws exist in every state to protect elderly people being abused physically or emotionally and/or suffering from neglect. Ms. Mathes will discuss Pennsylvania laws pertaining to the reporting of elder abuse and neglect, and will specify who are considered mandated reporters of elder abuse under Pennsylvania law. In addition, she will discuss the obligations of mandated reporters, and the options for those who are not considered mandated reporters. This presentation will increase paralegals' ability to become aware and recognize elder abuse and neglect. Also, Ms. Mathes will point out how one can readily identify the factors that may result in elder abuse and neglect, and then later will discuss one's obligations for reporting suspected abuse. Additionally, this session will provide information regarding services available for investigating and responding to cases of abuse and neglect. Community responses to elder abuse will be discussed as well.

1.25 NFPA CLE ETHICS CREDIT PENDING

Michele Mathes, J.D.

Director of Research Programs

Center for Advocacy for the Rights and Interests of the Elderly

Michele Mathes is the Director of Education and Director of Research Programs at the Center for Advocacy for the Rights and Interests of the Elderly in Philadelphia. She received her undergraduate and law degrees from the University of Pennsylvania and holds a Certificate in Bioethics and the Medical Humanities, as well as a Certificate in the Ethics and Regulation of Research with Human Subjects from Columbia University College of Physicians and Surgeons/Montefiore Medical Center and New York University Division of Nursing/Montefiore Medical Center, respectively. Ms. Mathes is an Associate Fellow of the University of Pennsylvania Center for Bioethics, and serves as adjunct faculty at Drexel University College of Medicine, Bryn Mawr Graduate School of Social Work and Social Research, and the University of the Sciences in Philadelphia. She has published and presented regionally and nationally on issues of ethics in health care, particularly long term care, and elder mediation. Her publications include "Commitment, Relationship, Voice: Cornerstones for an Ethics of Long Term Care" (with JoAnne Reifsnyder, PhD and Maureen Gibney, DPsych); "Ethics, Law and Aging Review," Vol. 10 (2004) and "Compliance with Advance Directives: Wrongful Living and Tort Law Incentives" *Journal of Legal Medicine*, 29:2, 133-178 (2008) (with Holly Fernandez Lynch, JD, MBE and Nadia Sawicki, JD, MBE). Ms. Mathes is the recipient of a Philadelphia City Hall Citation for her work with homeless Philadelphians.

INTELLECTUAL PROPERTY - PATENTS

Seminar III-D

Top 10 Hints for IP Paralegals – “How to Make Your Life Easier & Become Invaluable to the Team”

Intellectual property law is one of the hottest and fastest growing practice areas in the legal industry today. This session is intended to offer hints and tips for paralegals on how to survive in a busy Intellectual Property practice and to achieve success in this area of law. Mr. Woodbridge will offer suggestions on how to capture the most out of your billable time. In addition, he will also make recommendations on how best to manage working with demanding and difficult attorneys while juggling numerous assignments.

1.25 NFPA CLE CREDIT PENDING

Richard C. Woodbridge, Esquire *Fox Rothschild LLP*

Richard C. Woodbridge received his J.D., cum laude, from the National Law Center of the George Washington University and his B.S. in Electrical Engineering from Princeton University. Currently, he is a Partner at Fox Rothschild LLP, and his practice is focused in mechanical and electrical inventions, with an emphasis on computers, computer software, technology transfer, licensing and the organization of high technology businesses. He has particular experience in all areas of intellectual property, including patents, trademark and copyrights, corporate and business start ups, licensing, litigation, negotiations, computer law and communications law.

Before Fox Rothschild, Mr. Woodbridge was a partner in the Princeton office of Synnestvedt & Lechner, LLP, a boutique intellectual property firm. At the beginning of his career, Mr. Woodbridge gained experience as a design engineer with the International Equipment Department of Proctor & Gamble, and as an examiner in the U.S. Patent and Trademark Office.

Over the years, Mr. Woodbridge has appeared often on public television and radio and is the editor and chief author of *Protecting Intellectual Property Under New Jersey Law*, published by the Cambridge Institute, and co-author of the 1989 edition of “Marketing Your Invention,” a booklet published by the American Bar Association. He also served as an elected member of the Princeton Borough Council for 11 years, including two years as Council president. He was subsequently elected committeeman for Princeton Township, where he served as mayor from 1991 through 1992.



Session IV

3:30 p.m. to 4:45 p.m.

ETHICS

Seminar IV-A

Ethical Issues During Economic Highs and Lows

This session will examine the ethical responsibilities of the paralegal in the law firm and the legal field during difficult economic times. A volatile economy can have a significant ethical impact on the paralegal in the workplace as well as in the job market. Topics such as the destruction of evidence, competitive pressure to retain clients, and changing law firms will be explored. Ms. Sherman's discussion will offer insight and an understanding of the attorney perspective in supervising paralegals and maximizing profits. All of these issues will focus on the importance and management of professionalism, life balance, and stress in the legal field.

1.25 NFPA CLE ETHICS CREDIT PENDING

Carol J. Sherman, J.D.
Associate Professor, Legal Studies
Peirce College

Carol J. Sherman received her J.D. degree from Temple University and has been practicing law for over 15 years, licensed in both Pennsylvania and New Jersey. Ms. Sherman started her legal career as an associate attorney at an insurance defense firm and later worked as an associate at a personal injury firm in Philadelphia. She specialized in medical malpractice and other personal injury actions.

She is presently an Associate Professor at Peirce College's Legal Studies Program. She teaches students online and on campus in courses such as Introduction to Paralegal Studies, Introduction to Legal Writing, Advanced Legal Writing, Advanced Legal Research, Contracts, Legal Technology, Employment Law, Family Law, Workers' Compensation, Associate and Bachelor Degree Capstone, and Ethics. Ms. Sherman is a faculty advisor for Peirce College's Paralegal Student Association.

Prior to joining Peirce College, Ms. Sherman was the Deputy Managing Attorney and Pro Bono Director at Legal Aid of Southeastern Pennsylvania, where she managed the Elder Law Unit and worked closely with other agencies to provide quality legal care. Her caseload in the elder unit covered a wide range of topics including consumer fraud, landlord tenant issues, social security problems, mortgage foreclosures, contract disputes, guardianship disputes, powers of attorney and wills.

She has served as an adjunct professor for the Legal Nursing Consultant Program and the Paralegal Certificate Program at the University of Delaware. She was also an adjunct professor of Villanova Law School, Clinical Program.

Ms. Sherman is a member of the Philadelphia Bar Association.

MEDICAID

Seminar IV-B

Basic Medicaid Planning: Not Just for the Elder Law Paralegal

The area of elder law requires special focus on financing long-term care, as well as careful drafting considerations within estate planning documents, i.e., Living Trusts, Wills and Powers of Attorney documents. This presentation will review the 4 basic documents and how, from an elder law point of view, there are important issues that must be addressed in the preparation of the Powers of Attorney and Advance Directives. Ms. Anderson will also review the various levels of the continuum of care for chronic illness, and possible financing options for long-term care. Special attention will be given to providing an update regarding significant Medicaid changes that are occurring as we speak, including possible expansion of Estate Recovery in Pennsylvania.

1.25 NFPA CLE CREDIT PENDING

Linda M. Anderson, Esquire, CELA
Anderson Elder Law

Linda M. Anderson concentrates her practice in the areas of elder law, estate planning, and special needs planning. She is the principal of Anderson Elder Law in Media, Pennsylvania. Ms. Anderson is a certified elder law attorney by the National Elder Law Foundation and is a member of the National Academy of Elder Law Attorneys. She has been selected by her peers as one of Pennsylvania's Super Lawyers since 2004, and one of the top 50 female lawyers in Pennsylvania for 2007 and 2008. Ms. Anderson has been invited to be a member of the Council of Advanced Practitioners for the National Elder Law Academy, and is a member of the Special Needs Alliance. Ms. Anderson has a Master's in Taxation from Villanova University and graduated from the University of San Francisco School of Law. She is the immediate past Chair for the Pennsylvania Bar Association, Elder Law Section, and Co-Chair of the Delaware County Bar Association's Elder Law Committee. Ms. Anderson has served on the Board of Directors of Horizons Unlimited Geriatric Education Association and is a frequent lecturer on the topics of elder law, estate planning, and long-term care planning.



PROFESSIONAL DEVELOPMENT

Seminar IV-C

Recession Proof Your Paralegal Career: How to Find a Job and Keep It

Not only are paralegals frequently in demand, the profession always has a better than average job outlook even in bad economic times. As a result of the downturn in our economy, recent increases in bankruptcies and home foreclosures means that there will likely be a greater need for paralegals in the legal profession. This session will offer tips for recession-proofing your paralegal career and will be enlightening as well as entertaining. Ms. Jacobs will emphasize the importance of networking and impart the do's and don'ts of networking etiquette. Also in this session, she will offer strategies for handling interview questions. Through this session, helpful tips for managing the interview process before, during and after you meet with the potential employer will be discussed. She will provide hints on developing a strong resume, cover letter and list of references. Finally, she will discuss why it is important to continue to inter-office network while increasing your value in the workplace to make yourself indispensable once you are on the job.

1.25 NFPA CLE CREDIT PENDING

Jane Breslin Jacobs, Esquire

Assistant Professor

Community College of Philadelphia

Jane Breslin Jacobs is a full-time Paralegal and Social Science professor at Community College of Philadelphia in their ABA-approved Paralegal school, the only public institution in Philadelphia offering this program. She is a frequent contributor to *The Legal Intelligencer*, the *Philadelphia Forum* (PAP) and other publications and has spoken at many live seminars. In addition to her teaching responsibilities, Professor Jacobs is also the Internship Coordinator, Mentor Developer and Job Coach for the program. She is a member of the 17th District of Philadelphia Youth Aid Panel, a community arm of the Philadelphia District Attorney's office, and both the Professional Development and Pro Bono Committees of PAP as well as the Women in the Profession and Delivery of Legal Services Committees of the Philadelphia Bar Association.

Professor Jacobs received her Juris Doctor from Fordham Law School and her B.A., magna cum laude, from the University of Albany.

Sarah Turowski

Paralegal Student

Community College of Philadelphia

Sarah Turowski is in her second year at Community College of Philadelphia's ABA-approved Paralegal Studies Program. For her internship at school, she worked at Jenkins Law Library, and was hired part-time during the school year. She is also the President of the Paralegal Student Association and is a Legal Research and Writing tutor for the program.

MEDICAL LEGAL

Seminar IV-D

Deconstructing Medical Records

Are you tired of struggling to find the information you need in medical records? Missing documents, unrecognizable terminology and abbreviations and conflicting information in the sequence of events are frustrating. Often, these records can provide your legal team with crucial, case-winning information, assuming you know how to find it. In order to locate this evidence, it is crucial for you to know how to acquire, organize, manage and evaluate medical records. Ms. Burke's presentation will provide the knowledge you need to effectively use medical information to support your client's case theory. In this session, Ms. Burke will cover how to request and obtain complete medical records and how to decipher medical abbreviations and procedure codes. In addition, you will learn how to deconstruct medical records piece by piece to gain a clear understanding of a medical history, and learn the proper techniques used in preparing medical summaries, medical records privilege logs, and redaction logs.

1.25 NFPA CLE CREDIT PENDING

Kathleen Foley Burke, Esquire

Post & Schell, P.C.

Diploma from Lankenau Hospital School of Nursing 1979

BSN Widener Nursing 1983

MSN Widener Nursing Administration 1984

Temple Law 1990

Kathleen Foley Burke is partner in the Professional Liability Department of Post & Schell, P.C. She began her career as a registered nurse and initially worked as a staff nurse in the Medical Intensive Care Unit at Lankenau Hospital. Thereafter, she then joined Crozer Chester Medical Center as Clinical Coordinator of the Medical Surgical Unit, then the Coronary Care Unit. Her intensive nursing background is a perfect complement to the defense of healthcare organizations and providers to whom she regularly lectures on medical-legal issues. Ms. Burke's areas of practice include, Long Term Care (LTC) Litigation, Medical Malpractice Defense and Professional Liability.

Ms. Burke frequently lectures to a variety of healthcare professionals, including nurses, physicians, physician assistants, radiology students and others, on liability issues related to their specific disciplines.



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Menu Selections

PA CONVENTION CENTER
MAIN BALLROOM 12:00 – 2:00 P.M.

SALAD

Seasonal Tossed Salad with Chef's Selection of Dressing

ENTRÉE

Herb Crusted Chicken with Tarragon and Garlic Aioli Sauce

Roasted Potatoes

Seasonal Vegetables

OR

Deep Dish Lasagna with Marinara Sauce

Seasonal Vegetables

DESSERT

Triple Chocolate Cake

Rolls — Butter

Freshly brewed coffee, decaffeinated coffee and teas

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Directions

Located in the heart of Philadelphia, The Pennsylvania Convention Center is easy to reach by **plane, train and car**. In fact, 40% of the U.S. population is within a day's drive of the facility. It's just a few minutes from I-95, which runs north and south and just 1.5 hours from New York and 2.5 hours from Washington D. C.

Amtrak Rail Transportation: Amtrak operates trains from 30th Street Station, with service along the Northeast Corridor and points west and south. For schedules, fare and other information: 1-800-USA-RAIL.

Septa Rail Line: The R-1 connects Philadelphia International Airport directly to Center City Philadelphia, including Amtrak's 30th Street Station and the Pennsylvania Convention Center. Other SEPTA Regional Rail Lines can shuttle you throughout the region: 215-580-7800.

Philadelphia International Airport: There are 31 airlines serving the newly renovated Philadelphia International Airport (PHL) with 1,500 daily inbound flights. U.S. Airways and Southwest are among the largest carriers: 1-800-PHL-GATE, 215-937-6800.

For more information on traveling to Philadelphia, Visit the **Philadelphia Convention and Visitors Bureau**

From From Rte 76 (Schuylkill)

Take Rte 76 to Exit 344/I-676 East. Take I- 676 East and exit at Broad Street/Rte. 611 (2nd exit). You will be on Vine Street. Follow signs for Vine Street/PA Convention Center to 12th Street (4 traffic lights). Make a right on to 12th Street. The entrances to the Convention Center are located two blocks ahead at the NE and NW corners of 12th and Arch Streets.

From From Interstate 95 North

Take I-95 North to Exit 22 Central Philadelphia / I- 676. Stay in the left lane of this exit. Follow signs for I-676 West to the 1st exit (Broad Street). This exit brings you up to 15th Street. Get into left lane and follow the sign for 611/Broad Street and make a left turn on to Vine Street. Follow signs for Vine Street/PA Convention Center. Make a right on to 12th Street. The entrances to the Convention Center are located two blocks ahead at the NE and NW corners of 12th and Arch Streets.

From Interstate 95 South

Take I-95 South to Exit 22 Central Philadelphia/I- 676. Stay in the left lane of this exit. Follow signs for 676 West to the 1st exit (Broad Street). This exit brings you up to 15th Street. Get into the left lane, follow the sign for 611/Broad Street and make a left turn on to Vine Street. Follow signs for Vine Street/PA Convention Center. Make a right on to 12th Street. The entrances to the Convention Center is located two blocks ahead at the NE and NW corners of 12th and Arch Streets.

From the Pennsylvania Turnpike

Follow Pennsylvania Turnpike to Exit 20/I-476. Take I-476 South to Exit 57/I-76 Philadelphia. Stay on I-76 East for approximately 12 miles to Exit 344/I-676 East. Take I- 676 East and exit at Broad Street/Rte. 611 (2nd exit). You will be on Vine Street. Follow signs for Vine Street/PA Convention Center to 12th Street (4 traffic lights). Make a right on to 12th Street. The entrances to the Convention Center are located two blocks ahead at the NE and NW corners of 12th and Arch Streets.

From the New Jersey Turnpike

Take NJ Turnpike to exit 4 (Philadelphia / Camden Exit). Take Rte. 73 North and follow it to Rte. 38 West. Take 38 West to the Benjamin Franklin Bridge, crossing into Philadelphia. Follow local traffic and the signs for Vine Street/PA Convention Center. Go approximately 6 blocks and make a left turn onto 12th Street. The entrances to the Convention Center are located two blocks ahead at the NE and NW corners of 12th and Arch Streets.

Arriving via Philadelphia International Airport

Take I-95 North to Exit 22 Central Philadelphia / I- 676. Stay in the left lane of this exit. Follow signs for I-676 West to the 1st exit (Broad Street). This exit brings you up to 15th Street. Get into left lane and follow the sign for 611/Broad Street and make a left turn on to Vine Street. Follow signs for Vine Street/PA Convention Center. Make a right on to 12th Street. The entrances to the Convention Center are located two blocks ahead at the NE and NW corners of 12th and Arch Streets.

Parking Suggestions

Name/Location	Lot/Garage	24 Hour Rate
Parkway Corp. 12 th & Arch St.	L	\$20.00
Parkway Corp. 1127 Race St.	G	\$17.00
Parkway Corp. Broad & Race	G	\$20.00
E-Z Park 9 th & Race/Vine St.	L	\$20.00
Galaxy II Garage 11 th & Arch St.	G	\$22.00
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Registration Deadline is October 30, 2009
(Limited Space will be available for walk-ins)

NAME OF REGISTRANT: _____

SESSION ONE	9:00 A.M. TO 10:15 A.M.	LOCATION
--------------------	--------------------------------	-----------------

Please check one seminar from this session that you would like to attend.

- | | | |
|--------------------------|---|------|
| <input type="checkbox"/> | Family Law | 107A |
| | Instructor: Ann G. Verber, Esquire & Shannon Braun, Paralegal | |
| <input type="checkbox"/> | Legal Writing | 106B |
| | Instructor: Glenn Barnes, Esquire | |
| <input type="checkbox"/> | Estates & Trusts I | 106A |
| | Instructor: Craig W. Martin, Sr. | |
| <input type="checkbox"/> | Risk Management for IP | 105A |
| | Instructor: Thomas Paradise, Esquire | |

SESSION TWO	10:45 A.M. TO Noon	LOCATION
--------------------	---------------------------	-----------------

Please check one seminar from this session that you would like to attend.

- | | | |
|--------------------------|--|------|
| <input type="checkbox"/> | Pro Bono | 107A |
| | Instructor: Andrea Saah, Esquire & Marie Elizabeth DeCarlo, Senior Paralegal | |
| <input type="checkbox"/> | Litigation | 106B |
| | Instructor: Gina F. Rubel, Esquire (Round Table) | |
| <input type="checkbox"/> | Estates & Trusts II | 106A |
| | Instructor: Craig W. Martin, Sr. | |
| <input type="checkbox"/> | IP – Trademarks | 105A |
| | Instructor: Nancy R. Frandsen, Esquire | |

SESSION THREE	2:00 P.M. TO 3:15 P.M.	LOCATION
----------------------	-------------------------------	-----------------

Please check one seminar from this session that you would like to attend.

- | | | |
|--------------------------|--|------|
| <input type="checkbox"/> | Technology | 106B |
| | Instructor: Dan Giancaterino, MS | |
| <input type="checkbox"/> | IP – Patents | 105A |
| | Instructor: Richard C. Woodbridge, Esquire | |
| <input type="checkbox"/> | Employment Law | 106A |
| | Instructor: Catherine T. Barbieri, Esquire | |
| <input type="checkbox"/> | Ethics I – Elder Abuse | 107A |
| | Instructor: Michele Mathes, JD | |



SESSION FOUR

3:30 P.M. TO 4:45 P.M.

LOCATION

Please check one seminar from this session that you would like to attend.

- ☐ **Ethics II** 107A
Instructor: Carol J. Sherman, JD
- ☐ **Medicaid** 106A
Instructor: Linda M. Anderson, Esquire
- ☐ **Professional Development** 106B
Instructor: Jane Breslin Jacobs, Esquire & Sara Turowski, Paralegal Student
- ☐ **Medical Legal** 105A
Instructor: Kathleen Foley Burke, Esquire

SEMINAR FEES

- PAP MEMBER Full Day Rate (includes participation in all four sessions and lunch)** Price: \$155.00
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- ATTORNEY/NON MEMBER Full Day Rate (Includes participation in all four sessions and lunch) Price: \$180.00
- ATTORNEY/NON MEMBER Half Day Session (Includes participation in two sessions and lunch) Price: \$150.00
- STUDENT Full Day Rate (Includes participation in all four sessions and lunch) Price: \$95.00
- STUDENT Half Day Session (Includes participation in two sessions and lunch) Price: \$65.00
- LUNCH ONLY Price: \$40.00

LUNCH SELECTION

Choose one selection

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