



The Philadelphia Association of Paralegals



**Friday October 19, 2012
Loews Philadelphia Hotel, 1200 Market Street
Philadelphia, PA**

Education Conference



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On behalf of The Philadelphia Association of Paralegals, we invite you to join us for our Annual Education Conference. This year, the Conference will be held at the Lowes Philadelphia Hotel on Friday, October 19, 2012. We anticipate the day to be filled with educational opportunities, networking and fun!

The theme of this year's conference is "*The Empowered Paralegal*." By attending the conference, it is our hope that paralegals will walk away better equipped to meet the daily challenges of today's law office. PAP is again so fortunate to have the most knowledgeable speakers in the field. Please see the Registration Form of this brochure for an outline of our outstanding lineup of seminars. At present, all but three courses have been approved for 1.25 NFPA CLE credits and approval of the remaining three courses is expected shortly. Additionally, again this year, we expect to have four courses preapproved by the PA CLE Board for 1.00 credits each.

We are honored to have Scott Reid, Esquire, of Cozen O'Connor to deliver the Keynote speech. Mr. Reid is a partner at Cozen O'Connor and chairs his firm's diversity committee, as well as that of the Philadelphia Bar Association. As for the rest of the conference, our Education Committee Chair and past president, Lyndora Patterson Tiller, and the entire education committee have spent the majority of this year planning a spectacular conference, as you will see from the offerings in this brochure. We are honored to have two repeat classes and presenters due to popular demand: Judge John Milton Younge's "*Effective Legal Writing for Dispositive Motions*" and "*An Introduction to Corporate Immigration Law for Paralegals*" by Wendy Castor Hess, Esquire and Yuh Jessica Choi, Esquire, each of which received rave reviews. As usual, it will be difficult to choose between the 16 exciting topics and their dynamic and esteemed presenters.

PAP would also like to extend a special thank you to our vendor sponsors and encourage our members to use their services before using a competitor. Don't miss your chance to meet with our sponsors attending the conference and check out some of the wonderful giveaways!

We look forward to seeing you at the 2012 Education Conference.

**Christine Flynn, President
and the 2012 Board of Directors**



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Scott Reid is a member (a/k/a partner) at Cozen O'Connor, chairing their Diversity Committee. He is also the Philadelphia Bar Association's first diversity chair. Mr. Reid practices with the firm's Commercial Litigation Group, focusing on products liability and commercial and complex litigation. He defends companies that design and manufacture medical devices, pharmaceuticals and home safety products, advising on compliance with industry standards and minimizing risk as it relates to product manufacturing. In addition, Mr. Reid defends construction companies, product manufacturers, hotel chains and retailers in cases involving premises liability, breach of contract claims, business disputes and business torts.

He received his Bachelor of Science from West Chester University of Pennsylvania in 1996. In 2002, he received his law degree from Widener University School of Law. While attending law school, Mr. Reid served as a law clerk for the Honorable Robert C. Wright of the Delaware County Court of Common Pleas and as an intern in the Regulatory Affairs Division of the Philadelphia City Solicitor's Office. He also served as president of the Black Law Students Association, senior staff on the Delaware Journal of Corporate Law and received the 2002 Outstanding Student Service Award.

Mr. Reid is a part of several boards. Current memberships include the Widener University Board of Overseers, West Chester University Alumni Association Board of Directors, the Pennsylvania Bar Association Minority Bar Committee, the Widener University School of Law Minority Alumni Advisory Board, the Board of Directors of the Philadelphia Diversity Law Group and the Board of Directors of the Conscious Thoughts Initiative.

He is a member of the American Bar Association, National Bar Association, Pennsylvania Bar Association, Philadelphia Bar Association, Barristers Association of Philadelphia and Philadelphia Area Defense Counsel. Mr. Reid is a former president and currently serves on the Executive Committee of the Barristers Association of Philadelphia.

Professional achievements include:

- ★ Super Lawyers "Rising Stars: 2006, 2007, 2008, 2010, 2011, 2012" (no Rising Stars publication in 2009).
- ★ 2012 Recipient - Trailblazers and Pioneers Award; Black Law Students Association, Widener University School of Law.
- ★ 2010 Recipient - National Bar Association/IMPACT "Top 40 Lawyers Under the Age of 40."
- ★ 2009 Recipient - Alumni Achievement Award, Kappa Alpha Psi Chester Alumni Chapter.
- ★ 2009 Recipient - Distinguished Young Lawyer Award, Barristers Association of Philadelphia.
- ★ 2008 - Named Top 10 Under 40 by The Philadelphia Tribune.
- ★ 2008 Honoree - West Chester University "Drum Major for Justice Award."
- ★ 2007 "Lawyers on the Fast Track" - one of only 35 attorneys statewide (Pennsylvania) selected by American Lawyer Media-Pennsylvania and The Legal Intelligencer.
- ★ 2006 - Inducted into the West Chester University Alumni Legacy of Leadership.
- ★ 2005 Recipient - Kappa Alpha Psi Webb Hallman Alumni Achievement Award.

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I would like to thank the Education Committee members, Judith Bardsley, Christine Flynn, Karen Daemer, Stephanie Laste, Monica Londo, Vivian Luckiewicz, Babette Pace, Anya Pollard, Venita Ruff, Thom Schroder, Judy Stouffer, Jo-Ann Williams and Jana Henry for their assistance with the organization of The Philadelphia Association of Paralegals' 2012 Education Conference.

We want to thank our Keynote Speaker and all of the speakers for taking the time out of their busy schedules and volunteering their time and efforts in making the Education Conference a success.

On behalf of The Philadelphia Association of Paralegals' Education Committee, we thank the following businesses for their continued support and contribution to this event:

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We would like to thank DTI for the printing and distribution of our Education Conference Brochure.

We would like to extend a special thank you to Mark Viggiano for all his hard work and his ever-attentive layout design.

Lyndora Patterson Tiller
Education Committee Chairperson

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The Philadelphia Association of Paralegals'
Education Conference
Friday, October 19, 2012



Schedule of Events

Registration: 8:00 A.M. – 8:55 A.M.

Congress Foyer

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.

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

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

Keynote Address by
Scott Reid, Esquire
Howe Room

* * * * *

Session III: 2:00 P.M. – 3:15 P.M.

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

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

Session IV: 3:30 P.M. – 4:45 P.M.

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Exhibit Area: 8:00 A.M. – 4:45 P.M.



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Session I

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

BANKRUPTCY . . .

SEMINAR I-A

It's not a four-letter word.

This session will cover various perspectives of bankruptcy law today. We will address the chapters of bankruptcy available to individual and corporate filers, as well as the basics of how a bankruptcy case proceeds. Finally, we will also look at bankruptcy from the creditors' perspective.

1.25 NFPA CLE Credits

1.0 PA CLE Board Credit Pending

ROBERT M. BOVARNICK, ESQUIRE

Bovarnick and Associates LLC

Rob Bovarnick represents businesses of all sizes and in all industries, and their principals. His practice is focused on all aspects of business litigation, including, but not limited to, determining a business' proper structure, drafting all types of contracts, purchasing and selling all or part of a business, renegotiating debts and bankruptcies, and representing businesses and their principals as either plaintiffs or defendants. Mr. Bovarnick also represents an international bank for matters within the mid-Atlantic region. While most of his clients are privately held companies, he has served as outside general counsel to publically traded companies.

In addition to his practice, Mr. Bovarnick writes the "Ask the Expert" column in *Forbes* as well as the "Good Counsel" column for *Forbes.com*. He also writes a monthly political column for *Pennsylvania Law Weekly* called "Politically Right," and is a legal contributor for Fox Business News.

For the first six years of his career, he was a trial lawyer, trying various types of business dispute cases, first in Miami and then in Philadelphia. After moving to Philadelphia, Mr. Bovarnick spent six years at a business and bankruptcy boutique law firm, where he represented companies in financial distress. He then became the head of the creditor's rights department at a mid-sized firm, which was followed by a stint as Vice Chair of the Bankruptcy Practice Group at one of the largest law firms in Philadelphia. He started his own firm in late 2002. Also, Mr. Bovarnick taught the Advanced Bankruptcy Seminar at Rutgers University Law School-Camden for five years.

Mr. Bovarnick has been selected as a "Super Lawyer" in Pennsylvania every year since 2006 in the areas of business, business litigation and commercial bankruptcy. He has also been named as one of the Preeminent Lawyers in America by LexisNexis every year since 2006.

He received his B.A. in political science from the University of Washington in Seattle, Washington and his J.D. from the University of Miami in Miami, Florida. Mr. Bovarnick is licensed in Pennsylvania and Florida, as well as numerous federal courts.

Effective Legal Writing for Dispositive Motions

This seminar will cover advanced issues in Civil Procedure regarding dispositive motions through the eyes of a judge. The do's and don'ts of proper writing techniques for motions wherein the moving party is seeking to preclude the non-moving party from proceeding to verdict from the finder of fact will be discussed. Learn how to write summary judgment, compulsory non-suit and post-trial motions from a judge's perspective.

1.25 NFPA CLE Credits**HONORABLE JOHN MILTON YOUNGE**

Judge, Court of Common Pleas of Philadelphia County

Judge John Milton Younge, a native Philadelphian, was elected to a ten year term on the Court of Common Pleas in 1995 and was re-elected in 2005. Raised in the southwest section of the City, he is a product of the Philadelphia public school system and a member of the 232nd graduating class of Central High School in 1973. Judge Younge earned a degree in Business Administration from Boston University in 1977 and in 1981, he received his Juris Doctor degree from the prestigious Howard University School of Law. His previous employment includes Deputy Executive Director and General Counsel, Redevelopment Authority of Philadelphia (1985 to 1995), Attorney and Counselor at Law (1982 to 1985) and his own community based, private law practice. He continues to teach legal education for judges and lawyers and is an adjunct professor at Delaware County Community College.

Judge Younge's Civic/Church involvements are Chairman, Board of Directors of the West Philadelphia Community Mental Health Consortium; Chairman, Board of Directors of New Life Credit Union; Board Member of the Central High School Alumni; Member of the Omega Psi Phi Fraternity, Mu Omega Chapter; Chairman, Board of Finance & the Deacon's Board of Sharon Baptist Church; and Board Member of Cobbs Creek Community Environmental Education Center. His professional involvements are Member, PA Conference of State Trial Judges; Candidate for Masters of Judicial Studies Degree, National Judicial College, Reno, Nevada; Member, Clifford Scott Green Chapter, NBA Judicial Council; Pennsylvania Bar Association, House of Delegates; and Philadelphia Bar Association; Member.

Judge Younge resides in the Wynnefield section of Philadelphia with his wife, Joy May Brown-Younge and their three children, Jessica, James and Jennifer.

Medicine and the Indispensable Paralegal

This session will provide paralegals with practical information on how to identify, obtain, gather, organize and interpret medical issues/medical records in personal injury and medical malpractice claims. Paralegals will learn key information on how to maximize their indispensable role for the attorney in streamlining the medical issues in these cases for discovery, depositions, expert review, pretrial preparation, right up to, and into the courtroom.

1.25 NFPA CLE Credits**JOSEPH L. MESSA, JR., ESQUIRE**

Messa & Associates, P.C.

The founding partner of Messa & Associates, P.C., Joseph Messa was born and raised in Philadelphia. He began his legal education as an honors graduate of Tulane University in 1984, and went on to graduate cum laude from Temple University School of Law in 1988, where he was honored with the Horace Stern Award for Excellence in Products Liability and an American Jurisprudence award for Products Liability. A noted presenter in the legal and medical fields, as well as on local and national news broadcasts, Mr. Messa has built a firm that shares his concentration in Medical Malpractice, Products Liability, Transportation Accidents, Construction and Workplace Injuries, Fire, Medical Device and Drug Products Liability, as well as other fields of complex personal injury litigation.

Mr. Messa is a member of the Bars of the Supreme Courts of Pennsylvania and New Jersey, the U.S. District Court for the Eastern District of Pennsylvania and the U.S. Court for the District of New Jersey, as well as the U.S. District Court for the District of Colorado, and the First, Third, and Sixth Circuit Courts of Appeals. He is an active member of the American Association for Justice; American Bar Association; Pennsylvania Association for Justice; New Jersey Association for Justice; the Philadelphia, Camden, and Burlington County, New Jersey Bar Associations; and the Justinian Society. In addition to being a member of the Philadelphia Trial Lawyers Association, he has served on its Board of Directors since 2006. Mr. Messa previously served in the leadership position of Assistant Secretary from 2010 - 2012, and currently holds the leadership position of Treasurer for PTLA.

In addition, he serves as a Judge Pro Tem, evaluating complex injury cases for the Philadelphia Court of Common Pleas. He has also served as a court-appointed Committee Member in the Bone Screw Products Liability Litigation/MDL-1014, In Re: Diet Drugs/MDL-1204, and the Bridgestone Firestone Tire Litigation/MDL-1373. Mr. Messa is the author of several published articles in the field, particularly in the areas of Managed Care Liability and Hospital Acquired Infections. Mr. Messa is an AV rated attorney listed in the Bar Register of Preeminent Lawyers, a member of The Million Dollar Advocates Forum, Multi-Million Dollar Advocates Forum, an invited member of the Verdict Club, Premier Trial Lawyers and named a Top 100 Trial Lawyer by the National Trial Lawyers. He has been recognized as a Pennsylvania Super Lawyer in 2009, 2010, 2011 and 2012 in his primary areas of practice — Medical Malpractice and Products Liability — awarded to only the top 5% of attorneys in the state. Mr. Messa was selected to the Top 100 Pennsylvania and Top 100 Philadelphia Super Lawyers lists for 2012. He has successfully litigated multiple, serious injury cases to seven and eight figure verdicts and settlements in all of the areas outlined above. This includes a \$12.25 million verdict; which, at the time, was the largest verdict in the history of Camden County, New Jersey; and an \$8 million verdict in Philadelphia, Pennsylvania.

Current Issues in Real Estate Affecting Paralegals

This session will cover current issues affecting paralegals who work on real estate transactions, including aspects of entity formation, title, survey, zoning and real estate development. We will also focus on changes to ALTA survey standards and Pennsylvania title insurance forms and regulations.

1.25 NFPA CLE Credits

STUART D. POPPEL, ESQUIRE

Berman, Indictor & Poppel LLP

Stuart Poppel concentrates his practice on all aspects of real estate development, with an emphasis on the development of affordable rental and for-sale housing. Mr. Poppel routinely represents for-profit and non-profit developers, investors and housing authorities in the creation of affordable and senior housing projects involving federal low income housing tax credits and historic rehabilitation tax credits. In addition, Mr. Poppel has represented developers and housing authorities in HOPE VI and Mixed Finance transactions. He is a frequent speaker and author on affordable housing, real estate development and urban redevelopment issues.

ANN IZZI, PARALEGAL

Berman, Indictor & Poppel LLP

Ann Izzi is a paralegal at Beman, Indictor & Poppel LLP, who has twenty years of experience in the legal field. At Berman, Indictor & Poppel, Ms. Izzi forms corporations, limited partnerships and limited liability companies in various states. She prepares corporate resolutions and minutes and reviews and analyzes title commitments and surveys. Ms. Izzi also coordinates titles, surveys and closing requirements with lenders and investors in preparation for closings, prepares closing binders and attends real estate closings.

Session II

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

EMPLOYMENT LAW

SEMINAR II-A

Understanding and Managing Workplace Complaints and Investigations

All employment-related disputes begin with a current or former employee making a complaint. For this reason, training on effective and lawful workplace complaint investigations is essential for legal professionals, human resources' personnel, and others charged with the responsibility of responding to complaints, conducting investigations and/or maintaining related documents/records.

This session will cover how to identify a "complaint" brought by an employee; internal complaints versus external complaints; the obligations of the employer in dealing with complaints in the workplace; the role of the investigator; principles of justice, fairness and ethics that arise; collecting evidence; conducting effective interviews; common pitfalls; deciding the outcome of an investigation; writing an investigation report; and record keeping.

1.25 NFPA CLE Credits

KIMYA S. P. JOHNSON, ESQUIRE

Cozen O'Connor

Kimya Johnson joined the firm's Philadelphia office in November 2008 as an associate in the Commercial Litigation Group, practicing in the Labor & Employment Group. She handles state and federal employment discrimination claims under Title VII, FMLA, ADEA and the ADA; retaliation actions; ERISA claims; WARN Act litigation; and executive contract issues, among others. Ms. Johnson also counsels employers with regard to human resources matters and has actively represented clients on a pro bono basis. Prior to joining Cozen O'Connor, she was an associate with Alston & Bird LLP in New York.

Ms. Johnson is a member of several bar associations and civic organizations. She currently serves as "First Lady" of the Bright Hope Baptist Church in Northeast Philadelphia and on the Spectrum Awards Committee for the Southeastern Pennsylvania Chapter of the American Red Cross. Prior to entering law school, Ms. Johnson served as a public elementary school teacher in South Bronx, New York through the Teach for America (AmeriCorps) program.

She earned her law degree, cum laude, from Case Western Reserve University School of Law, where she was a member of the National Moot Court team and earned the Labor and Employment Law and Contracts Law awards for being the top-ranked student in these subject areas. In addition, Ms. Johnson received the Martin Luther King, Jr., Milton Kramer Law Clinic and Student Leadership Awards. She earned her master's degree from Columbia University and her undergraduate degree, cum laude, from Spelman College, where she was the first student selected for the Spelman/Dartmouth Exchange Program.

Ms. Johnson is admitted to practice in New York and Pennsylvania. She is also admitted to the U.S. District Courts for the Southern and Eastern Districts of New York and the Eastern District of Pennsylvania.

End of Life Issues in Pennsylvania

This program will discuss end of life issues under Pennsylvania Law and the U.S. Constitution, both in the context of estate planning and in the context of implementation and/or enforcement. We will also explore factors contributing to the legal and ethical questions in end of life situations. Particular cases of importance in Pennsylvania and around the country will be discussed as they relate to the historical development of the law in this area.

We will look at a broad spectrum of situations that should be anticipated when planning for end of life. The preparation and use of advanced medical directives, living wills, medical powers of attorney and statements of "health care representatives" under Pennsylvania law will also be covered.

1.25 NFPA CLE Credits**STEPHEN A. FELDMAN, ESQUIRE**

Feldman & Feldman

Recognized both locally and nationally as a leading authority on planning for the elderly, Mr. Feldman practices law in the Philadelphia area firm of Feldman & Feldman. He is an Adjunct Professor of Law at Temple University, Beasley School of Law. Additionally, Mr. Feldman has been appointed as a Special Assistant Attorney General for the state of North Dakota to represent its Department of Human Services in an appeal pending before the United States Court of Appeals for the Eighth Circuit. He is the former Executive Director of the Senior Citizens Judicare Project (now the Senior Law Center).

Mr. Feldman has served on the Advisory Panel for the National Institute on Aging's Alzheimer's Disease Education and Referral Center (ADEAR). Currently, he serves on the Board of Directors of the Senior Law Center (where he formerly served as Chair and Secretary), the Board of Directors of the Alzheimer's Association of Delaware Valley (where he formerly served as Vice President) and the Board of Directors of Federation Housing, Inc. of Philadelphia.

He previously served as President of the Board of Directors of the Alzheimer's Association of Southeast Pennsylvania and as Treasurer of the Board of Directors of Community Legal Services. He also formerly served on the Board of Directors of the Center for Advocacy for the Rights and Interests of the Elderly (CARIE) and the Long Term Care Advisory Board of the Philadelphia Corporation for Aging (PCA), the Philadelphia area agency on aging. Mr. Feldman was the first chair of the Philadelphia Task Force on Elder Abuse and a drafter of the Protection of the Elderly Act.

Discovery and Social Media in Litigation

Social media such as Facebook and Twitter have proliferated modern life for people of all ages. Many of us cannot go an entire day without posting our activities, thoughts and favorite pastimes to one of these websites. The use of advanced cellular telephones have encouraged and facilitated access to these media outlets no matter where we are.

Recent developments in the law have made our clients' use of these social media sites subject to discovery in litigation. Many county courts have addressed the accessibility of once thought-to-be private postings to these sites to the defense in personal injury cases. Typically, a preliminary review showing that the client utilized social media following their receipt of injuries emanating from an incident is required in order to allow the probing eyes of defense counsel access to a plaintiff's Facebook or Twitter accounts. Once this preliminary showing has been made by the defense, courts have been apt to order plaintiffs to provide their passwords to these accounts so that discovery of the contents can be perused.

During this seminar, we will review specific guidelines that should be given to clients with regard to social media and highlight discovery methods used by both plaintiffs and defendants with regard to litigation.

1.25 NFPA CLE Credits Pending

DEAN WEITZMAN, ESQUIRE
Sillers, Langsam & Weitzman, P.C.

Attorney Dean Weitzman (a/k/a "My Philly Lawyer"), managing partner of Silvers, Langsam and Weitzman, has extensive litigation experience throughout the Pennsylvania and New Jersey state courts, as well as the federal district courts of both Pennsylvania and New Jersey. His trial experience includes medical malpractice, products liability, wrongful death, motor vehicle and trucking accidents, workman's compensation and estate litigation. Mr. Weitzman is also the host of an hour-long Court Radio show on legal issues every Sunday morning on WRNB-FM 107.9, helping local residents by talking with them about their rights in everything from car accidents to wills, trusts and real estate matters.

He earned his Bachelor's degree in psychology from Temple University in 1984 and his Juris Doctor in 1987 from Temple University School of Law. Mr. Weitzman worked throughout college to put himself through school as the supervisor in a group home for mentally-handicapped adults. He is a member of the Pennsylvania Bar Association and the Philadelphia and Pennsylvania Trial Lawyer's Associations.

Mr. Weitzman also volunteers in his community, serving as a Big Brother and as a business sponsor for several non-profit groups, including the American Cancer Society, the Bread of Life Foundation and Mothers Against Drunk Driving (MADD). He is an avid Philadelphia sports fan, following the Phillies and Eagles, as well as Temple's football and basketball teams. Born and raised in Northeast Philadelphia, Mr. Weitzman lives in Meadowbrook, Montgomery County. He and his wife, Lisa, have two children.

Intellectual Property (and other Legal) Issues in Social Networking

This presentation will discuss intellectual property and other legal issues in social networking and the Internet generally. These issues will include those related to ownership of content, unauthorized use of company and product names and other infringement concerns, tort liability, employment practices, litigation impact and ethical considerations. Ample time will be provided for questions and answers.

1.25 NFPA CLE Credits Pending

JOSEPH A. MARTIN, ESQUIRE

Archer & Greiner, P.C.

Joseph A. Martin is a partner with the law firm of Archer & Greiner, P.C. in Haddonfield, New Jersey. Mr. Martin earned his Juris Doctorate from Rutgers University School of Law and a Bachelor of Arts from the College of New Jersey. He was admitted to practice in New Jersey in 1996 and to the U.S. District Court, District of New Jersey in 1997.

Mr. Martin litigates disputes in arenas throughout the country. He represents clients in many different industry sectors and businesses, including aviation-related sales, leasing and services; intellectual property, including copyrights, patents, trademarks and trade secrets; software development and licensing; technology contracts across many industries; healthcare intellectual property, including patent litigation, software licensing and IT services agreements; managed care and healthcare services, including PBM and TPA contracts; healthcare fraud and abuse; antitrust and unfair competition in various industries, including healthcare, insurance, Internet retailing, sports and government contracts; and partnership and shareholder disputes in numerous industries, including real estate, technology, manufacturing, advertising, accounting, architectural and legal.

Mr. Martin is currently the Co-Chair of Archer & Greiner's Intellectual Property Group, and was named by *South Jersey Magazine* as a "Top Attorney" for 2007 and 2008 in the areas of Computer and Internet Law and Franchise and Distribution Law. He also was recognized by *South Jersey Magazine* as a top attorney for 2007 in the area of Copyrights and Trademarks.

Session III

1:00 p.m. to 2:15 p.m.

LITIGATION

SEMINAR III-A

The Ethics of E-Discovery Step-By-Step

We will cover all steps of e-discovery – preservation, collection, processing, searching, attorney review and production. After touching upon what each step entails technically, we will discuss the ethical implications of each step, including the ethical responsibility of counsel in ascertaining information with regard to preservation and in taking steps to preserve the ethical issues that can arise when certain collection methods and strategies are used, the ethical implications of various search strategies, including keyword and related searches as well as concept searching and predictive coding, and the obligations of counsel as they pertain to the production of e-discovery.

1.25 NFPA Ethics CLE Credits

1.25 NFPA CLE Credits

1.0 PA CLE Board Credit Pending

LEONARD DEUTCHMAN, ESQUIRE

General Counsel & Vice President, LDiscovery, LLC

Leonard Deutchman is General Counsel and Vice President for LDiscovery, overseeing all aspects of the company's digital forensics, electronic discovery and corporate investigations and regulatory compliance practice. He meets with clients and advises them in all legal and technical aspects of e-discovery, digital forensics and related services. When appropriate, he assists attorney-clients with drafting interrogatories, requests for documents and motions, and reviews matters regarding computers, electronic surveillance and related fields.

Some key matters in which he has been involved in a consultative and project management role include:

- BP Deepwater Horizon Matter – Advised DOJ as to how to preserve and collect ESI from various federal agencies in litigation involving the Gulf oil spill and oversaw collection;
- Pennsylvania House Democratic Caucus, “Bonusgate” Investigation – Advised Caucus as to how to gather data in response to Grand Jury subpoena and oversaw collection, processing and production;
- Advised plaintiff regarding and oversaw digital forensics in *Bimbo Bakeries USA v. Botticella*, 2010 U.S. Dist. LEXIS 68990 (E.D.PA. February 9, 2010), *aff'd*, 613 F.3d 102 (3d Cir. 2010), a precedential matter involving a high-level employee who copied key data just prior to leaving the employer for a competitor.

Mr. Deutchman, former chief of the Economic & Cyber Crime Unit at the Philadelphia District Attorney's Office, presents CLEs and speaks informally to attorneys and businesses regarding digital forensics, electronic digital discovery, regulatory compliance and internal investigations, having done so in New York, New Jersey, and Pennsylvania – including the Pennsylvania Judiciary, Delaware and Virginia, covering all aspects of e-discovery and digital forensics. He has been an adjunct professor at Chestnut Hill College since 2004. Mr. Deutchman currently authors “GeekSpeak,” a monthly column for *The Legal Intelligencer/law.com*.

Retirement Benefits in Decedent's Estates

In this session, we will review tax consequences in Pennsylvania with regard to various forms of retirement benefits that may be transferred at death, including qualified plans, IRAs, Roth IRAs and tax-sheltered annuities. For inheritance tax purposes, the level of taxation may depend on the decedent's age. For income tax purposes in Pennsylvania, different considerations determine taxability. A different set of rules applies to nonqualified deferred compensation, and Pennsylvania rules can vary greatly from the IRS rules.

We will discuss the complex requirements for distribution of retirement benefits after death to comply with provisions of the Internal Revenue Code. Again, the rules differ depending on the decedent's age and whether benefits were being received. In addition, special rules relating to trusts adds another level of complexity to the question of when distributions must occur to avoid substantial penalties.

1.25 NFPA CLE Credits**ROBERT H. LOUIS, ESQUIRE**

Saul Ewing LLP

Bob Louis is a partner in and co-chair of the Personal Wealth, Estates and Trusts Practice at Saul Ewing LLP. He has significant experience in numerous aspects of the process of acquiring, preserving and passing on the wealth of individual clients and their businesses. Mr. Louis primarily focuses his practice on executive compensation, retirement plans, employee benefits, and tax and estate planning for these kinds of benefits. As an adjunct to this work, he counsels clients in developing family business succession plans, often involving benefit planning; he also assists with estate planning, including the preparation of wills, trusts and other estate planning documents to further the process of wealth preservation and transmission. Mr. Louis is Editor of *Personal Wealth Law News*, a law blog hosted by the Firm that reviews developments in areas of the law that help people to accumulate, preserve and pass on wealth, and consults with the Family Business Center, which reviews issues relevant to family business issues. He also has two Twitter accounts, Boblouisesq and FamilyBusCtr.

In addition, Mr. Louis has had broad and extensive experience with employee benefits plans, stretching back to the enactment of ERISA in 1974. He has been a member of the Employee Benefits Committee of the American Bar Association Tax Section for more than 30 years. He works on matters relating to the preservation and transmission of personal wealth. On behalf of clients, Mr. Louis prepares estate plans and documents, carrying out those estate plans that help to preserve wealth, minimize tax liabilities and bring about the flow of wealth to family members in ways that achieve and support family goals.

Mr. Louis is also a member of the Business Planning Committee of the Philadelphia Bar Association Probate and Trust Law Section. He participates in the online communities, Family Business Network, Family Business Wiki and Family Business Life, among others. He is a member of a national group of advisors to family businesses, Family Business Peers. He writes a blog and articles on trusts and estates issues for *The Legal Intelligencer* and is a frequent lecturer and writer on topics relating to employee benefits, estate planning, asset protection planning and business succession planning. He frequently presents at Pennsylvania Bar Association and Pennsylvania Bar Institute programs and is often quoted in national publications on various tax and benefits-related topics.

What A Paralegal Needs To Know To Survive Today's Shifting IP Landscape

This presentation will discuss various methods and tools that today's Intellectual Property paralegal can use to manage his/her work/life balance while keeping up with the constant change in various IP laws. The course will provide a brief overview of Intellectual Property, including a review of current legislation that may impact Patent, Copyright, Trademark and Trade Secret practices. Specialization in Intellectual Property will also be discussed and why, in order to be successful, one should pick an area of specialization. The Technology Transfer specialization model will be used as a reference point in this presentation in order to show real-time practicing examples of management for a large IP portfolio. The presentation will be followed by a question and answer session.

1.25 NFPA CLE Credits**STEPHANIE LASTE, PARALEGAL**

Children's Hospital of Philadelphia

Stephanie Laste is an Intellectual Property Specialist in the Office of Technology Transfer at Children's Hospital of Philadelphia (CHOP). She is currently responsible for managing CHOP's entire Intellectual Property portfolio, working closely with the Director of the Office of Technology Transfer, the Associate Director of Licensing and Commercialization, various law firms and CHOP's investigators to ensure CHOP's interests in patent protection.

Ms. Laste earned her A.A.S. Degree in Paralegal Studies at an ABA-approved paralegal program and graduated from Saint Joseph's University in Philadelphia with a B.S. in Political Science, concentrating in Legal Studies. Prior to joining CHOP, she had been employed at some of Philadelphia's most prestigious law firms as a paralegal working on major litigation in various fields of law. She has almost 20 years of experience in the legal arena, with the last 12 years being dedicated to patent law.

She is the Chairperson of the Intellectual Property Committee for The Philadelphia Association of Paralegals. Ms. Laste is also a current member of the Association of University Technology Managers and is an active member on their Technology Transfer Practice Manual Subcommittee.

PRO-BONO

SEMINAR III-D

Enhancing Your Job Search Through Participation in Pro Bono Work

Part I of this session will focus on an overview of paralegals and pro bono work. Reasons to participate, pro bono organizations in the Philadelphia area and types of volunteer opportunities will be covered.

Part II will cover how volunteering ties in with any search for employment. We will discuss finding the right pro bono opportunity, volunteer etiquette, networking through pro bono work, journaling, follow-through and highlighting pro bono work on resumes.

1.25 NFPA CLE Credits

JUDITH BARDSLEY, PARALEGAL

Sovereign Bank

Judith Bardsley, an e-discovery paralegal at Sovereign Bank, has over 15 years of experience in corporate and commercial litigation. Judith has served as The Philadelphia Association of Paralegals' Pro Bono Committee Chair since 2003, and has been the National Federation of Paralegal Associations' Pro Bono Co-Coordinator for the past two years. She earned her A.S. in Paralegal Studies from Cumberland County Community College, a B.A. in Law/Justice from Rowan University, as well as a M.S. from Drexel University in Library and Information Science.

Session IV

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

ETHICS

SEMINAR IV-A

Ethics and Legal Technology

This seminar will examine current issues in ethics regarding the use of cloud storage; electronic files; electronic mail; social networking and metadata. In addition, case law and ethical opinions will be examined and analyzed. Specific attention will be given to the paralegal's role regarding confidentiality. Practical solutions and approaches will be addressed.

1.25 NFPA Ethics CLE Credits

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1.0 PA CLE Board Credit Pending

CAROL J. SHERMAN, J.D.

Professor, Legal Studies, Peirce College

Carol J. Sherman received her J.D. from Temple University School of Law and practiced law for over 15 years. Her practice focused on insurance defense, medical malpractice, personal injury, elder law and custody matters. She is licensed in Pennsylvania and New Jersey.

Ms. Sherman is presently a Professor of Legal Studies at Peirce College. She teaches courses such as Introduction to Paralegal Studies, Introduction to Legal Writing, Advanced Legal Writing, Advanced Legal Research, Contracts, Legal Technology, Civil Litigation, Employment Law, Family Law, Workers' Compensation, Associate and Bachelor Degree Capstone and Legal Ethics in both the on campus and online formats. Ms. Sherman is also the 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 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 for the Villanova University School of Law, Clinical Program.

Ms. Sherman is President of the Mid-Atlantic Academy of Legal Studies in Business. She is a volunteer for Philadelphia Volunteer Lawyers for the Arts, a program of the Arts and Business Council of Greater Philadelphia and an affiliate of the Greater Philadelphia Chamber of Commerce.

In June 2010, she was awarded Peirce College's Hamilton Award in recognition of Academic Excellence and Integrity. In December 2010, Ms. Sherman received Peirce College's S.T.A.R. Award (Service to Achieve Results) for a faculty member exemplifying the highest level of external Customer Service.

An Introduction to Corporate Immigration Law for Paralegals

This course will focus on the ABCs of Non-Immigrant visas such as B-1s, Es, F-1, Hs, J-1s, L-1s, O-1s, TNs and Qs and the “1-2-3s” of Immigrant visas: EB-1s, EB-2s, EB-3s, and EB-5 Investor Visas. We will review the “team” approach, including working with corporate and tax attorneys to achieve maximum efficiency and client satisfaction.

1.25 NFPA CLE Credits**WENDY CASTOR HESS, ESQUIRE**

Goldblum & Hess

Wendy Castor Hess, a co-founder of the immigration law firm of Goldblum & Hess, has been consistently recognized as one of the top immigration attorneys nationally and internationally. She currently serves as Chair of the Immigration Committee of the Philadelphia Bar Association, as Vice Co-Chair of the Immigration Section of the Pennsylvania Bar Association, as President of HIAS Pennsylvania (an organization dedicated to assisting immigrants and refugees), as Co-Chair of the USCIS/ AILA Liaison Committee of the Philadelphia Chapter of the American Immigration Lawyers Association (AILA) and as a member of the AILA Board of Publications Committee. Ms. Hess, who is fluent in Spanish and conversant in French, is a frequent national lecturer and the author of numerous articles, particularly in the I-9 compliance and medical fields. Her clients include global corporations, foreign investors, prestigious universities/ research centers as well as the Mexican Consulate. She is listed in The International Who's Who of Corporate Immigration Lawyers as one of the best business immigration attorneys internationally (www.whoswholegal.com). She is also listed as one of the best immigration attorneys in the United States (www.bestlawyers.com), and has been listed as one of the best immigration attorneys in Pennsylvania (www.superlawyers.com).

YUAH JESSICA CHOI, ESQUIRE

Goldblum & Hess

Ms. Choi has been an Associate with Goldblum & Hess since 2006. She possesses vast experience with all aspects of both nonimmigrant and immigrant visas, and currently handles employment-based nonimmigrant and immigrant as well as family-based cases. Ms. Choi is the Vice Chair of AILA's Philadelphia Chapter, and previously served as the Treasurer, Secretary, New Member's Division Chair, Annual CLE Conference Co-Chair and CLE Liaison. In addition, she has lectured on business immigration topics and has been published in one of the Korean daily newspapers in the Philadelphia area. Furthermore, Ms. Choi has published articles pertaining to business immigration law, including “*Alien-Related Issues to Spot Before Commencing a PERM Case*” in ‘AILA's Guide to PERM Labor Certification: Strategies, Samples, and Guidance for Achieving Success’ (AILA, 2011).

Prior to joining Goldblum & Hess, Ms. Choi gained legal experience interning at the United States Equal Employment Opportunity Commission in Honolulu, Hawaii as well as various law firms in Hawaii and New York. In addition, she worked as the Executive Assistant to the Korean Ambassador to the United Nations before going to law school, where she assisted the Foreign Student Advisors at the University of Hawaii. Ms. Choi is fluent in Korean. She received her J.D. from the William S. Richardson School of Law of the University of Hawaii in 2005 and her Bachelor of Arts degree from the University of Pennsylvania; she is admitted to the Bars of New York and Hawaii.

Soft Skills in Hard Times: How to Leverage Your Skills Strategically

Do you have ample experience? A strong skillset? A stellar academic background? A few years ago, this may have warranted an interview, recognition or even a promotion. Today, technical skills alone may not suffice. In a more competitive job market, your skills are now baseline requirements. How do you get to that next level opportunity? How do you become a value-add when many employers are focused on reducing resources? How do you become a team contributor instead of just a team member?

In this session, you will learn how to leverage your soft skills to succeed in today's workplace, learn the art of identifying, honing and employing soft skills—strategically. You already know the basics—professional networking, effective communication, collaboration. But do you know how to expand them so you can become a more empowered employee? If you're interested in elevating your competencies from *basic* to *strategic*, this is the session for you.

1.25 NFPA CLE Credits Pending

UVA CRISTINA COLES

Dean, Career Development Services, Peirce College

Uva Coles has garnered over 18 years of corporate and not-for-profit experience in various areas of Career Development, Leadership, Mentorship and Diversity and Inclusion. As Dean, Career Development Services for Peirce College, she led the design and implementation of career management services for Peirce College. Ms. Coles provides her team leadership and strategic direction and manages a comprehensive range of services and resources for students and alumni. She also participated in the institution's strategic planning process and represents the college to external agencies and networks.

Prior to joining Peirce, Ms. Coles was Vice President, Intake Services, for Big Brothers Big Sisters Southeastern Pennsylvania (BBBS SEPA). As such, she was responsible for overseeing the organization's Recruitment, Customer Relations and Enrollment & Match teams. Ms. Coles also co-led the Agency's Diversity and Inclusion efforts.

She previously worked for INROADS/Mid-Atlantic managing the implementation of business internships and co-ops for corporations seeking high level, diverse talent. Her work included building career development and leadership skills in high-talent college students and consulting with Fortune 500 accounts in the tri-state area to manage intern recruitment, placement, and full-time conversion of diverse candidates. In the initial stages of her career, Ms. Coles worked for QVC overseeing the product writing and editing process for online retail and was also a freelance writer.

Ms. Coles is a member of the PowerShift Philadelphia Host Committee and a 2011 graduate of LEADERSHIP Philadelphia. She Chairs Peirce College's Employer Advisory Board and is also a member of the College's Paralegal Advisory Board.

A native of the Republic of Panama, Ms. Coles is actively involved in several art-based organizations and initiatives. She is a Resident Artist with the Pennsylvania Arts in Education Partnership, a Leeway Grant Awardee and a speaker, facilitator and blogger whose topics range from Leadership to Strategic Career Management. Ms. Coles has been featured in numerous venues and publications including *Essence Magazine*, *Forbes.com* and *Schools.com*.

Ms. Coles is a graduate of Claflin University. She lives with her husband and two children in Wilmington, Delaware.

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1.25 NFPA CLE Credits**ROGER A. SMITH, ESQUIRE**

Executive Vice President, e-Document Services
The MCS Group, Inc.

Roger Smith is Executive Vice President of the e-Document Services division of The MCS Group, Inc. As a seasoned litigation support specialist and ESI expert, Mr. Smith consults with law firms and corporate clients to strategize and implement best practices in discovery to keep costs down while helping clients to efficiently analyze relevant information. He is a Certified Concordance and Catalyst Database Trainer, with over 10 years of experience in litigation technology, ranging from project management using e-Discovery to litigation software development.

KEVIN MELFI, MARKETING SPECIALIST

The MCS Group, Inc.

Kevin Melfi is a Marketing Specialist with The MCS Group, Inc. While studying at Drexel University, Kevin's litigation support career began at Esquire Solutions, where he was quickly promoted to Litigation Technology Specialist for the Philadelphia Office. There, he became proficient in Real-time Court Reporting software, technical setups for depositions and arbitrations and Sanction trial presentation software. After graduation, Kevin was brought into The MCS Group to start the Marketing Division.

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*Chicken Breast, Artichoke Mashed Potatoes,
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OR

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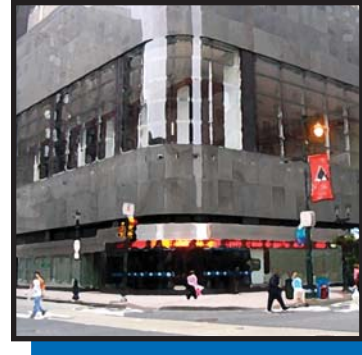
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- Continue approximately four blocks (Pass the Convention Center)
- Cross Market Street
- Entrance and Valet Parking on right-hand side

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- Follow signs for 676 West
- Continue on 676 to the Broad Street Exit
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- Follow signs for Ben Franklin Bridge
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- Follow Vine Street to 12th Street
- Turn Left onto 12th Street
- Continue approximately four blocks (Pass Convention Center)
- Cross Market Street
- Entrance and Valet Parking on right-hand side

FROM 76 EAST:

- Follow 76 East to Exit 344 (676 East)
- Continue on 676 to the Broad Street Exit
- Follow signs for Vine Street/Local Traffic
- Continue on Vine to the third light (12th Street)
- Turn Right onto 12th Street
- Continue approximately four blocks (Pass Convention Center)
- Cross Market Street
- Entrance and Valet Parking on right-hand side



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Registration Form

NAME OF REGISTRANT: _____

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

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

- | | | |
|-------|--|-------------------|
| _____ | BANKRUPTCY: It's not a four-letter word* | Congress A |
| | Instructor: Robert M. Bovarnick, Esquire | |
| _____ | LEGAL WRITING: Effective Legal Writing for Dispositive Motions | Congress B |
| | Instructor: Honorable John Milton Younge | |
| _____ | MEDICAL LEGAL: Medicine and the Indispensable Paralegal | Congress C |
| | Instructor: Joseph L. Messa, Jr., Esquire | |
| _____ | REAL ESTATE: Current Issues in Real Estate Affecting Paralegals | Room 414 |
| | Instructor: Stuart D. Poppel, Esquire and Ann Izzi, Paralegal | |

SESSION TWO 10:45 A.M. TO 12:00 P.M.

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

- | | | |
|-------|---|-------------------|
| _____ | EMPLOYMENT LAW: Understanding and Managing Workplace Complaints and Investigations | Room 414 |
| | Instructor: Kimya S. P. Johnson, Esquire | |
| _____ | ESTATES & TRUSTS: End of Life Issues in Pennsylvania | Congress A |
| | Instructor: Stephen A. Feldman, Esquire | |
| _____ | INTELLECTUAL PROPERTY: Intellectual Property (and other Legal) Issues in Social Networking | Congress B |
| | Instructor: Joseph A. Martin, Esquire | |
| _____ | LITIGATION: Discovery and Social Media in Litigation* | Congress C |
| | Instructor: Dean Weitzman, Esquire | |

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

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

- | | | |
|-------|---|-------------------|
| _____ | ESTATES & TRUSTS: Retirement Benefits in Decedent's Estates | Congress A |
| | Instructor: Robert H. Louis, Esquire | |
| _____ | INTELLECTUAL PROPERTY: What A Paralegal Needs To Know To Survive Today's Shifting IP Landscape | Congress B |
| | Instructor: Stephanie Laste, Paralegal | |
| _____ | LITIGATION: The Ethics of E-Discovery Step-By-Step* | Congress C |
| | Instructor: Leonard Deutchman, Esquire | |
| _____ | PRO-BONO: Enhancing Your Job Search Through Participation in Pro Bono Work | Room 414 |
| | Instructor: Judith Bardsley, Paralegal | |

SESSION FOUR

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

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

- _____ **ETHICS: Ethics and Legal Technology*** **Congress A**
 Instructor: Carol J. Sherman, Esquire
- _____ **IMMIGRATION: An Introduction to Corporate Immigration Law for Paralegals** **Room 414**
 Instructor: Wendy Castor Hess, Esquire and Yuah Jessica Choi, Esquire
- _____ **PROFESSIONAL DEVELOPMENT: Soft Skills in Hard Times: How to Leverage Your Skills Strategically** **Congress B**
 Instructor: Uva Coles, Dean
- _____ **TECHNOLOGY: The e-Powered Paralegal** **Congress C**
 Instructor: Roger A. Smith, Esquire and Kevin Melfi

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