

The Philadelphia Association of Paralegals' Education Conference



**Friday, September 12, 2014
Pennsylvania Bar Institute
The Wanamaker Building
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*Angelo Salandra and Kurt Watson are our contacts. Quality will be sponsoring our August 5, 2014 dinner.

**Coleen Abbott and Kyndra Worrell are our contacts. Veritext will be sponsoring our 2014 Education Conference Luncheon.

***Gregg Wolfe, Jenn Murphy and Mindy Stasio are our contacts. K LW will be sponsoring our 2014 Joan Weldon Scholarship at our August 5, 2014 dinner.

****Jeff Love, Heather McDonald and Victoria Stavish are our contacts. Love will be sponsoring our 2014 Pro Bono Award in October, for the second year in a row. (SAVE THE DATE: Our 4Q luncheon will be held on Tuesday, October 14, 2014 at Del Frisco's.)

The Philadelphia Association of Paralegals'

Annual Education Conference

Friday, September 12, 2014

PBI – CLE Conference Center – 10th Floor

Wanamaker Building – Philadelphia, PA

SCHEDULE OF EVENTS

Registration: 8:00 a.m. – 9:00a.m.

10th Floor Reception Area

Continental Breakfast: 8:00 a.m. – 9:00 a.m.

(Sponsored by Heaven Sent)

Session I: 9:00 a.m. – 10:15 a.m.

Morning Break: 10:15 a.m. – 10:45 a.m.

(Sponsored by Kroll Ontrack)

Session II: 10:45 a.m. - Noon

Luncheon: 12:00 noon - 2:00 p.m.

Keynote Address by

The Honorable C. Darnell Jones, II

The Crystal Tea Room - 9th Floor

(Sponsored by Veritext)

Session III: 2:00 p.m. – 3:15 p.m.

Afternoon Break: 3:15 p.m. – 3:30 p.m.

(Sponsored by Peirce College)

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. TO 4:45 P.M

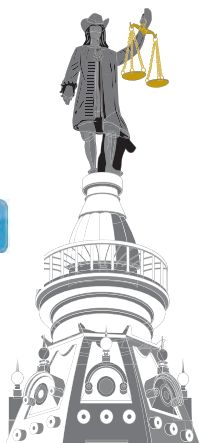


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August 2014

Dear Potential Education Conference Attendee:

I hope you will join us for The Philadelphia Association of Paralegals' 2014 Education Conference! This event is the highlight of the year for the Association and I hope that you will all take advantage of this great opportunity to learn about a new area of the law or refresh your knowledge in your current field.

The theme of this year's Conference is *The Ethical Paralegal*. By aspiring to conduct ourselves in an ethical manner, we confirm our profession's commitment to increase the quality and efficiency of legal services, as well as recognize its responsibilities to the public, the legal community and colleagues. Being an ethical paralegal means that you will strive to achieve a high level of competence through education, training and work experience. Attending this Conference can help you achieve that goal.

Our Annual Education Conference is a collaborative effort that begins in January of each year. Our Education Committee, which is comprised of the chairpersons of our practice group subcommittees, meets often to discuss current topics of interest, choose speakers, arrange for a venue, and so many other details. All of this planning is under the direction of our Second Vice President and Education Committee Chair, Lyndora Patterson Tiller, who worked tirelessly to make this event a success. Thank you, Lyndora, for your continued dedication to this project!

We also need to thank our most generous sponsors for their support today and throughout the year. Everyone knows that the economy is not at its best yet our sponsors are here for us because of their commitment to paralegal education.

To our speakers, who took time from their busy workday to share their knowledge with us, it goes without saying that there would be no Education Conference without you. Thank you for taking the time to be with us at this event.

We are pleased to have The Honorable C. Darnell Jones, II as our keynote speaker for this Conference. Judge Jones was appointed by President George W. Bush in 2008 to the United States District Court for the Eastern District of Pennsylvania. He has extensive legal experience in the Philadelphia community. Prior to becoming a judge, he practiced law at the Defender Association of Philadelphia, where among other responsibilities, he served as chief of the Family Court Division. Judge Jones obtained his bachelor's degree from Southwestern College in French, and his J.D. degree from American University, Washington College of Law. We are thrilled that he has graciously given of this time to share with us his views and experiences.

I sincerely hope that you all enjoy the sessions that we've put together for you today and that they help you maintain your status as an ethical paralegal.

Very truly yours,

Vivian

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The Philadelphia Association of Paralegals

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ASSOCIATION ACKNOWLEDGEMENTS

We would like to thank the Education Committee members, Theresa Coger, Karen Daemer, Lisa Dean, Christine Flynn, Anna Maria Jakubowska-Glowacka, Vivian Luckiewicz, Mary Lou O'Connell, Babette Pace, Victor Panieczko, Desiree Purvenas-Hayes, Wendy Reczek, Judy Stouffer and Tamika Way for their assistance with the organization of The Philadelphia Association of Paralegals' 2014 Education Conference. Special thanks to volunteers Tricia Evans, Diana Kirkland and Nataly Nguyen.

We also want to acknowledge our Keynote Speaker, The Honorable C. Darnell Jones, II and all of the speakers for taking the time out of their busy schedules and volunteering their time and effort in making the Education Conference a success. We extend our sincerest thanks.

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

Supporting Vendors

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We would like to extend a special thank you to the law firms of Saul Ewing and Berner Klaw & Watson for all of their extra support.

Lyndora Patterson Tiller

Education Committee Chairperson



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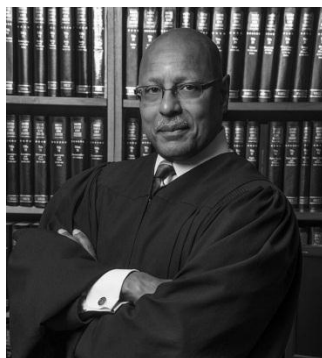
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2014 Keynote Speaker

The Honorable C. Darnell Jones, II



C. Darnell Jones, II was sworn in as a judge of the United States District Court for the Eastern District of Pennsylvania after nomination by President George W. Bush in 2008. He previously served as President Judge of the Court of Common Pleas for the First Judicial District of Pennsylvania from December 2005 until his appointment in October 2008. During his tenure as President Judge of Pennsylvania's largest judicial district, he was appointed Chair of the Administrative Governing Board (AGB) of the First Judicial District by the Supreme Court of Pennsylvania. The AGB is the coordinating body for all of the courts of the First Judicial District. Judge Jones began serving as a judge in the Court of Common Pleas in Philadelphia, Pennsylvania in 1987. He held various positions on the Court of Common Pleas, including: managing judge of the Adult Probation and Parole Department, member of the Judicial Education Committee, presiding judge and Co- Coordinating Judge of the Homicide Division and presiding judge in the Major Civil Trial Division. He served as a presiding judge in the Commerce Case Management Program (Business Court) and also served as a Supervising Judge of the Philadelphia County Grand Jury. Prior to becoming a judge, he practiced law at the Defender Association of Philadelphia, where among other responsibilities, he served as chief of the Family Court Division. Judge Jones obtained his bachelor's degree from Southwestern College in French and his J.D. degree from American University, Washington College of Law.

He has previously served as an adjunct professor at St. Joseph's University's Graduate School, Temple University School of Law and The National Institute for Trial Advocacy. Judge Jones has been an adjunct professor of law at the University of Pennsylvania Law School since 1993. He has taught Handling Capital Cases and Criminal Evidence for the National Judicial College. At the request of the Supreme Court of Pennsylvania, he oversaw the development of a curriculum for trial judges presiding over capital cases within the Commonwealth of Pennsylvania -- the Supreme Court's Capital Case Initiative program. He was a contributing author of *Presiding Over a Capital Case, A Benchbook for Judges* (William J. Brunson, Esq., et al. eds., 2009).

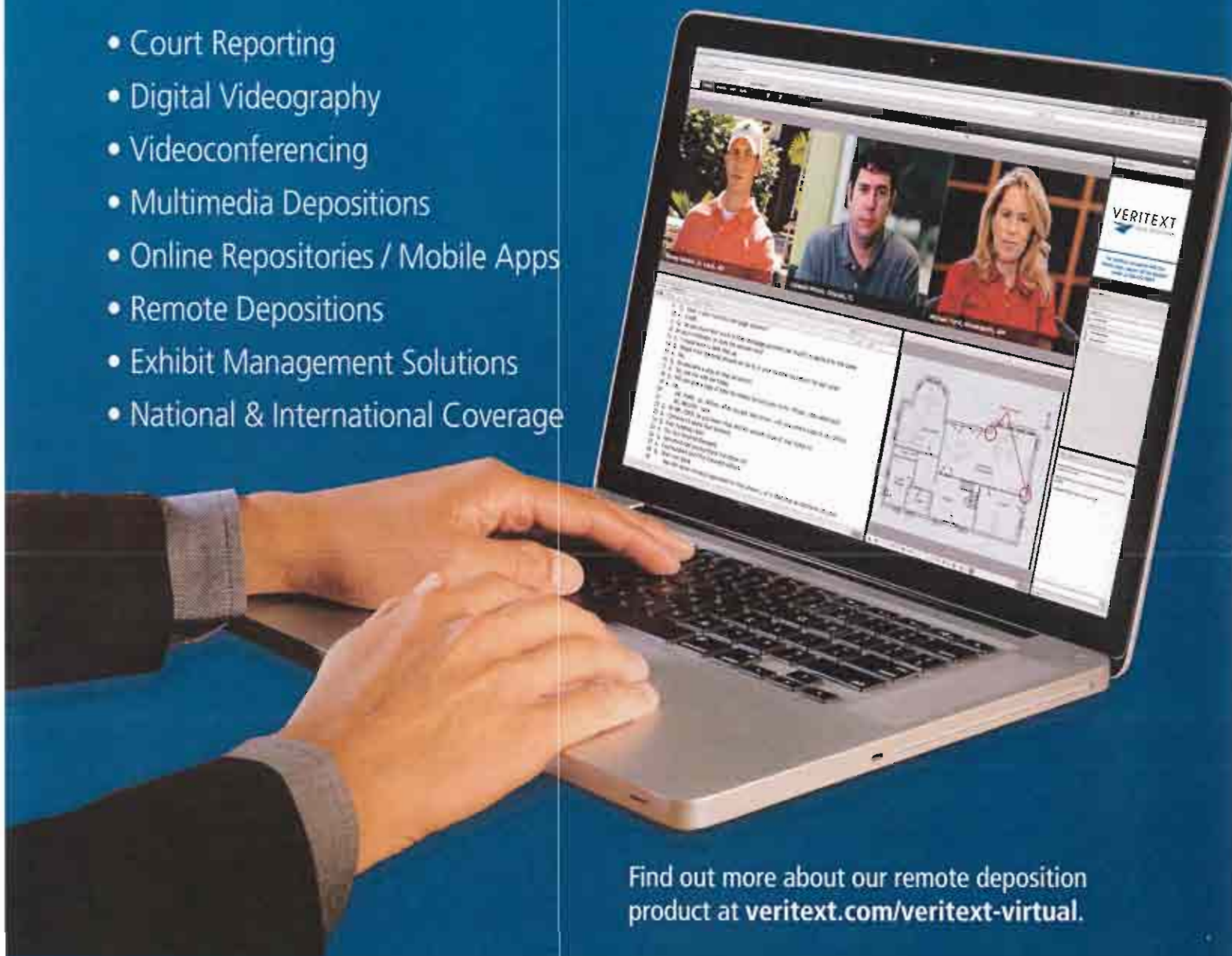
Judge Jones was named one of the 500 leading judges in America by *Lawdragon* magazine in 2005. He has been appointed a Business Court Representative to the American Bar Association's Business Law Section and served as a liaison to the Judicial Division of the ABA.

Judge Jones is a member of the University of Pennsylvania American Inn of Court. He currently serves on the Advisory Board of New Directions for Women; the Salvation Army Advisory Board, the Drexel University Law School Board, the Advisory Board of the George Mason School of Law - Law & Economics Center Judicial Education Program and previously served as a member of the Executive Committee of the National Conference of Federal Trial Judges. He is a member of the Model Civil Jury Instructions Committee for the Third Circuit. In 2012, Judge Jones was appointed to the Committee on Criminal Law of the Judicial Conference of the United States by Chief Justice John G. Roberts, Jr.

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The Philadelphia Association of Paralegals'

Annual Education Conference Luncheon

Friday, September 12, 2014
12:00 Noon – 2:00 p.m.

***The Crystal Tea Room – 9th Floor
Wanamaker Building – Philadelphia, PA***

MENU

CLASSIC GARDEN SALAD

*Mixed Greens, Sliced Cucumber, Roma Tomatoes, Black Olives and
Garlic Croutons tossed in a White Balsamic Vinaigrette*

CHICKEN PICCANTE*

*Pan Seared Chicken Breast with Lemon and Capers in a White Wine Butter Sauce
with Fingerling Potatoes and Grilled Seasonal Vegetables*

or

SALMON*

with Fingerling Potatoes and Grilled Seasonal Vegetables

or

VEGETARIAN LASAGNA

MINI PASTRY TRIO PLATE

*(fruit tart, cannoli, cream puff, éclair,
hazelnut moose tart, mini carrot cake)*

Includes: Bread ~ Water ~ Iced Tea ~ Coffee ~ Hot Tea

**These dishes are also offered in gluten-free versions. Vegan meals are also
available. Special requests must be received by August 29, 2014.*



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SESSION I

9:00 a.m. – 10:15 a.m.

Animal Law – Is the law going to the dogs?

Animal law encompasses all areas of law, from torts, contracts, family law, estate planning, and environmental law to constitutional law. It affects companion animals, wildlife, animals in entertainment and research and animals raised for food. This informative session will address the questions: What is animal law? How can you provide for Whiskers after your death? What happens to Rover following a divorce? Can a pit bull be a service animal? What's the legal difference between a dog and a lamp? Is a person who videotapes animal cruelty a terrorist? We will also discuss some of the complexities of practicing in this area, such as gaining standing and who (or what!) is the client.

1.25 NFPA CLE Credits Pending

1.25 Keystone Alliance CLE Credits Pending

Nadia Adawi, Esquire, J.D., M.B.A.



Ms. Adawi is an attorney in Philadelphia, Pennsylvania with a practice in general law, industrial agriculture policy, environmental citizen suits, non-profit governance, and animal welfare. She is a *cum laude* graduate of Drexel University's Earle Mack School of Law and also holds an MBA from the Yale School of Management and a Bachelors of Science in Electrical Engineering from the University of Missouri.

Prior to studying law, Ms. Adawi ran a small renewable energy company and founded a biofuels technology startup. Before that she helped launch the cellular telecommunications industry by designing a number of the first cellular networks and helping to develop and commercialize an advanced wireless phone technology. She was named a 2006 Renewable Energy Leader by Pennsylvania Governor Ed Rendell and a 2001 Woman of Distinction by the Philadelphia Business Journal.

She currently serves as the Vice Chair of the Pennsylvania Bar Association Animal Law Committee.

SESSION I

9:00 a.m. – 10:15 a.m.

Immigration – The Ethics of it All: Hot Topics in Immigration Law

This session will focus on hot topics in Immigration Law. We will discuss Deferred Action for Childhood Arrivals (DACA) renewals and new applications, as well as LGBT issues regarding same sex marriages and the expansion of immigration benefits post Windsor. The attendees will explore the City of Philadelphia's new policy regarding "ICE holds" and will learn about the prosecutorial discretion and how it can help their firm's client, U visas for Victims of Crimes and I-601A provisional waivers.

1.25 NFPA CLE Credits Pending

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Wendy Castor Hess, Esquire
Goldblum & Hess



Ms. Hess has been practicing immigration law for over 34 years. She currently serves as Chair of the Philadelphia Bar Association's Immigration Committee, as Co-Chair of the Pennsylvania Bar Association's Immigration Committee and as Co-Chair of the American Immigration Lawyers Association's Philadelphia USCIS liaison committee.

A former staff Attorney with the U.S. Department of Justice, Board of Immigration Appeals, Ms. Hess is a frequent speaker at national immigration conferences and the author of numerous immigration articles in both the business and family-based immigration areas. She is fluent in Spanish and serves as Immigration Counsel to the Mexican Consulate in Philadelphia. Ms. Hess has been consistently listed in *Super Lawyers* (Pennsylvania), *Best (Immigration) Lawyers in America* and in *The International Who's Who of Corporate Immigration Lawyers*.

SESSION I

9:00 a.m. – 10:15 a.m.

Litigation – Medicare Secondary Payer Compliance

This session will cover Medicare Secondary Payer Compliance, Conditional Payments and Lien Resolution. How can you be sure you are considering Medicare's interest in your settlement? What rights of recovery does traditional Medicare have? The discussion will include resolution of traditional Medicare Liens, the process and timeframes. Also included will be a focus on Medicare Part "C" liens. What rights of recovery do Part C providers have? This will include recent case law examples and review.

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Leslie Schumacher, RN, CRRN, CCM, LNCC, CLCP, CNLCP, MSCC, CMSP
President, PlanPoint



Ms. Schumacher is a Registered Nurse who actively holds Certified Life Care Planner and Certified Nurse Life Care Planner, as well as a Medicare Set Aside Consultant Certified and Certified Medicare Secondary Payer Professional credentials. As a graduate of Drexel University, she also holds the following additional certifications in Certified Case Management: Certified Rehabilitation Registered Nursing, Legal Nurse Consultant Certification, Medicare Secondary Payer and Certified Nurse Life Care Planning.

She maintains professional affiliations with the National Alliance of Medicare Set Aside Professionals (NAMSAP), American Association of Legal Nurse Consultants (AALNC), International Association of Life Care Planners (IALCP) and International Association of Rehabilitation Professionals (IARP). Ms. Schumacher has been elected as Board Member of both IARP and the IALCP; she is former chairperson of the Education Committee and current Board Member of NAMSAP as well as former ICHCC (International Commission for Health Care Certification) Commissioner of Medicare Set Aside Allocations.

Having also participated as an instructor of Medicare Set Aside education with the University of Florida, she is the co-founder and president of PlanPoint, LLC, a national provider of Medicare Set Aside Allocations.

SESSION I

9:00 a.m. – 10:15 a.m.

Technology – Bring Your Own Device: It's Here . . . Deal With It.

This session will cover the technological risks of bringing your own device to the workplace and using it for work purposes. We will cover losing the device and virus/malware vectors, as well as wage and hour issues related to non-exempt paralegals and compensation for work-related tasks done at home. We will wrap up with polices to mitigate risks, such as a) providing prompt notice of lost devices and immediate remote device wipe; b) controlling when, how and where firm information is accessed; and c) securing the device and authenticating that security.

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Gilbert Marquez, Law Firm Administrator

Feldman, Shepherd, Wohlgelemer, Tanner, Weinstock & Dodig LLP



Before joining Feldman Shepherd in 2006, Mr. Marquez was a principal of a company that provided computer network services, hardware, software, and support to mid-Atlantic region law firms for 20 years. Prior to that he held administrative positions in several Philadelphia law firms.

Mr. Marquez is a member of the Association of Legal Administrators and is active in the Philadelphia Chapter of that organization. He co-edited its newsletter, and is President of the Philadelphia Chapter for 2014-2015. He is an Associate Member of the Philadelphia Bar Association, and served on the Practice Technology Committee of the Philadelphia Bar Association's Law Practice Management Division.

A long-time supporter of legal services, he served two terms on the Board of Directors, one term on the Executive Committee, and chaired the Communications Committee of Philadelphia VIP (Volunteers for the Indigent), an organization providing legal services to low-income residents of Philadelphia.

SESSION II

10:45 a.m. – 12:00 p.m.

Corporate – The Anatomy of a Standard Contract

This program will cover standard contracts and boilerplate provisions. All contracts have essential components: from the identity of the parties to the signature block, we will walk through things to consider when reviewing an agreement. We will survey common types of agreements and the kinds of provisions you can expect to find in each. Throughout the program, attendees will learn drafting tips, how to recognize revenue recognition issues and what the boilerplate terms really mean. We will also explore deal points found at the heart of most contract negotiations.

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Rachel Branson, Esquire
SunGard Data Systems Inc.



Prior to joining SunGard in June as Corporate Counsel in the Asset Management Group, Ms. Branson was an associate in Schnader Harrison Segal & Lewis LLP's Corporate and Finance and Intellectual Property Practice Groups. At Schnader, she had a diverse practice where she handled a variety of client issues from software licensing to general corporate matters. Prior to becoming an attorney, Rachel worked for Accenture as an information technology consultant where she designed, tested and developed software and business applications.

Ms. Branson is an active member of the Philadelphia Bar Association, where she serves as Treasurer of the Business Law Section and as a member of the Board of Governors. She is also a past President of the Barristers' Association of Philadelphia, an affiliate of the National Bar Association. In addition, Ms. Branson is a member of the Board of Directors of Turning Points for Children, a social service organization that works to strengthen Philadelphia families.

She has received many awards and recognitions including: (i) *Super Lawyers Magazine*, Pennsylvania Rising Star, (ii) *The Philadelphia Tribune*, "Philadelphia's Most Influential African American Leaders," and (iii) *The Legal Intelligencer*, Pennsylvania "Lawyer on the Fast Track." Ms. Branson is a graduate of Villanova Law School and is admitted to practice in Pennsylvania and New Jersey. After earning her bachelor's degree in Physics, with minors in Mathematics and Japanese from Lincoln University, Ms. Branson taught English at Namegawa Senior High School in Saitama, Japan.

SESSION II

10:45 a.m. – 12:00 p.m.

Estates & Trusts – Special Needs Trusts/Planning & Operation

Securing life-long quality care for individuals with special needs requires thoughtful planning. By attending this CLE, attendees will understand First-Party Special Needs Trusts, Third-Party Special Needs Trusts, selecting appropriate Trustees, and preparing a Letter of Intent for Special Needs Planning in order to access and preserve public benefits such as Medicaid and SSI for clients with special needs. Attendees will also learn how to help clients avoid the most common costly mistakes in Special Needs Planning so that the special needs individual has a secure plan for the future. Guidance will be given to account for the medical, educational, and housing needs, as well as recreational, vocational, and spiritual needs of the special needs individual.

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Linda Anderson, Esquire, J.D., LL.M.
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.

SESSION II

10:45 a.m. – 12:00 p.m.

Intellectual Property – Recent Case Law

This seminar will cover six important recent cases in IP law. With regard to copyrights, we will review *American Broadcasting Companies. v. Aereo.* and *Patrella v. MGM.* As for patents, *Limelight Networks v. Akamai Technologies*; *Octane Fitness, LLC v. ICON Health & Fitness*; and *Highmark. v. Allcare Health Management Systems* will be reviewed. Lastly, in the trademark arena, we will highlight *POM Wonderful LLC v. The Coca-Cola Company* and *In Re Pamela Geller and Robert B. Spencer.*

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Wendy Reczek, Pa.C.P.

Wendy Reczek, Pa.C.P., is an intellectual property paralegal in suburban Philadelphia. She is also an adjunct faculty member of Villanova University's post-baccalaureate Paralegal Program.

Ms. Reczek is the former Chair of both the Keystone Alliance of Paralegal Associations and the Chester County Paralegal Association. She is currently the IP Committee Chair for the Philadelphia Association of Paralegals.

SESSION II

10:45 a.m. – 12:00 p.m.

Legal Writing – Clear, Concise Writing in the Law Office

This session will provide tips and suggestions for writing routine law office communications clearly and concisely. Examples of actual letters, e-mail messages, documents and published articles that include ambiguous, confusing or poorly written sentences and paragraphs will be provided. Attendees will be asked to suggest changes to improve the examples.

This session is not a grammar course and is not meant to give tips and suggestions on writing persuasive legal documents such as briefs. This session will allow the attendees an opportunity to consider how people other than the intended recipient of a communication would understand (or misunderstand) the communication. We will cover practical applications, including when to put something in writing and reasonable efforts to assure thoughts are conveyed without ambiguity.

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Nicholas Staffieri, Esquire

Mr. Staffieri received his Bachelor of Arts degree in Political Science from LaSalle University, his Master of Arts degree in Political Science from Temple University, and his law degree from Wake Forest University. Prior to entering private practice, he served for 11 years as General Counsel, the chief legal officer, for Southeastern Pennsylvania Transportation Authority (SEPTA), the sixth largest transit company in the United States.

He also served as Chief Counsel for the Pennsylvania Senate Committee on Urban Affairs and Housing and as Counsel to the Pennsylvania State Committee on Urban Affairs and Housing. Mr. Staffieri has practiced in courts ranging from the Courts of Common Pleas in the five-county Philadelphia Region to the Pennsylvania Supreme Court, the United States District Court and the Court of Appeals for the Third Circuit.

SESSION III

2:00 p.m. – 3:15 p.m.

Estates & Trusts – Fiduciary Litigation

As estate planning becomes a more complex and specialized field, involving tax and financial plans to minimize taxes and maximize economic gain, the human aspect of passing money from one generation to the next is often overlooked. Problems arise when there are conflicting interpretations of a deceased person's wishes, if assets are left to unrelated parties or if family members have conflicting opinions about what to do with family real estate and property.

Fiduciary litigation is a growing area of legal work, involving various kinds of disputes that can arise in connection with a will, trust, guardianship, power of attorney or other situations in which someone is responsible for managing and distributing money and property that is to benefit someone else. This course will explore some of the most common examples of fiduciary litigation and the evolving nature of this practice area.

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Ryan Gager, Esquire
Saul Ewing LLP

As special counsel in the Personal Wealth, Estates and Trusts Practice at Saul Ewing LLP, Ryan Gager counsels families and individuals in estate planning and administration matters. He also represents clients in litigation involving the transfer and preservation of wealth.

Mr. Gager represents and advises both beneficiaries and fiduciaries, like executors, administrators, personal representative, trustees, agents and guardians in will contests, disputes over the interpretation and administration of wills and trusts, breach of fiduciary duty claims, litigation over the control of family businesses and issues regarding the administration of charitable and tax-exempt entities.

SESSION III

2:00 p.m. – 3:15 p.m.

Intellectual Property – Patent Monetization

Patent monetization refers to the generation of revenue or the attempt to generate revenue by a person or company by selling or licensing patents. Patent monetization used to be a quiet, niche business. However, in recent years, it has become such a hot-button issue that it has captured the attention of the U.S. Congress and many state legislatures, who are now attempting to reign in certain types of entities who make their living monetizing patents, particularly, non-practicing entities (NPE's), also pejoratively called "patent trolls" by their critics. In this seminar, we will discuss the variety of ways that patents can be monetized, what entities are active in patent monetization (surprise, it's not only NPE's), and various details of the patent monetization process, including creation of "infringement claim charts."

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Clark Jablon, Esquire
Panitch Schwarze Belisario & Nadel LLP



Mr. Jablon is a founding partner of Panitch Schwarze Belisario & Nadel LLP and is a registered patent attorney. He focuses his practice on all phases of patent prosecution, including drafting and prosecuting patent applications, preparing patentability and infringement opinions, conducting intellectual property due diligence investigations and providing litigation support for patent cases. He is experienced in all phases of electronics, computer hardware and software, Internet technologies and computer-implemented business methods.

He has more than 29 years of experience in patent law, including eight years in the public sector as a Patent Examiner with the United States Patent and Trademark Office. Mr. Jablon was named in the 2010-2013 editions of Chambers USA.

SESSION III

2:00 p.m. – 3:15 p.m.

Time Management – Making the Most of Your Time

The overwhelming onslaught of relevant and time-sensitive material coming from a variety of sources—email, magazines, websites, faxes, v-mail, etc.—creates a feeling of information anxiety. For many, it is paralyzing and adversely affects our productivity. In this informational workshop, attendees will learn how to identify what is holding them back and pick up tips for maximizing their time and increasing their personal productivity.

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Ellen Freedman, CLM
Freedman Consulting Inc.

Ms. Freedman is founder and President of Freedman Consulting, which was established in 1998 to assist PA law firms with a full range of issues, strategic planning and project management on the business side of the practice. More information about Ms. Friedman and her law practice management services may be obtained at <http://www.FreedmanLPM.com>. She also serves as the Law Practice Management Coordinator for the Pennsylvania Bar Association, a position she has held since 1999.

SESSION III

2:00 p.m. – 3:15 p.m.

Real Estate – Hot Topics in Land Use Law

While new real estate development projects are on the rise throughout Philadelphia, moving a project through the zoning process can seem like a daunting task – even after Philadelphia entirely revamped its zoning code in 2012. Success lies in the ability to navigate myriad permit and approval requirements at multiple levels of government while at the same time tending to transactional details large and small. This course will familiarize attendees with the zoning process and help them avoid common mistakes.

1.25 NFPA CLE Credits Pending

1.25 Keystone Alliance CLE Credits Pending

Carl Primavera, Esquire
Klehr Harrison Harvey Branzburg LLP



Mr. Primavera chairs Klehr Harrison's Zoning and Land Use Group and is one of the area's premier zoning and land use attorneys. He has written and lectured extensively on a variety of topics including zoning and land use, real estate development, real estate tax assessments, the appeals process, and litigating real estate disputes. Mr. Primavera works closely with architects, engineers and construction professionals to achieve his clients' goals quickly and efficiently and has the skills to navigate the bureaucratic maze which surrounds the development of real estate in both urban areas and outlying suburban communities.

An active and prominent member of many legal societies and associations, he served as Chancellor of the Philadelphia Bar Association in 2001. Mr. Primavera is also a ranked attorney by Chambers USA and is listed in The 2014 Best Lawyers in America[®]. He has also been named a Pennsylvania Super Lawyer[®] consecutively since 2006 by a vote of his peers.

SESSION IV

3:30 p.m. – 4:45 p.m.

Ethics – The Three R's of Ethics

This presentation and group discussion will focus on the practical nature of ethics and three key components for every paralegal: Responsibility, Rules and Reality. The presentation will include current practical trends in the working environment, applicability of Pennsylvania Rules Statutes and Codes, the ABA Model Rules of Ethics, NFPA Model Code of Ethics and hypothetical situations.

1.25 NFPA CLE Ethics Credits Pending

1.25 Keystone Alliance CLE Ethics Credits Pending

Valerie Wilus, RP[®], Pa.C.P.

Secretary & Director of Operations

National Federation of Paralegal Associations, Inc.



Ms. Wilus became a Paralegal in January 1996, and promptly joined the law firm of Dolchin, Slotkin & Todd, P.C. as a Corporate and Estate Paralegal, due to her background in banking, and then later transferred to Litigation in 1997. On August 30, 2010, she joined the firm of Hangley Aronchick Segal Pudlin & Schiller as a Litigation Paralegal working in the insurance and litigation departments. Ms. Wilus' practice background is well rounded and includes: estate planning, estate administration, corporate, immigration, insurance, personal injury, medical malpractice, legal malpractice and contracts.

Ms. Wilus currently serves as the Secretary and Director of Operations for the National Federation of Paralegal Association. She previously served as the Region IV Director and the Armed Forces Coordinator, as well as other positions in NFPA. On the local level, Ms. Wilus served as past President and Board Advisor to the Board of Directors of the Philadelphia Association of Paralegals, previously held numerous Officer positions at PAP and, over the years, she served on many of the committees that PAP offers its members. Ms. Wilus has served the Keystone Alliance of Paralegal Associations as Chairperson and Chair of the Regulation Ad Hoc Committee that developed the Pennsylvania Certified Paralegal Program that is currently offered to the Paralegals throughout the Commonwealth of Pennsylvania.

Ms. Wilus obtained her R.P. designation on June 1, 2004 and obtained her Pa.C.P. designation on March 13, 2009.

SESSION IV

3:30 p.m. – 4:45 p.m.

Litigation – Working Up Today's Medical Malpractice Cases From Both Plaintiff-Defendant Perspectives

The medical malpractice landscape has changed dramatically in Pennsylvania over the last dozen years. As a result, many of the steps necessary to successfully prosecute and defend these very complex cases have significantly changed as well. This section will address the proper evaluation and work up of a medical malpractice case in 2014 from both the plaintiff and defense perspectives. The section will touch on all aspects of medical malpractice cases, from beginning to end. We will discuss issues from the initial pleadings and Certificates of Merit, to necessary discovery in the electronic records and social media age in which we now litigate these cases; the taking of depositions and "smart depositions" through properly preparing the case for mediation and trial.

1.25 NFPA CLE Credits Pending

1.25 Keystone Alliance CLE Credits Pending

Timothy R. Lawn, Esquire
Raynes McCarty



Mr. Lawn practices exclusively on representing individuals and families who have suffered serious injuries and death as a result of the wrongful acts of another. He has tried an extensive number of catastrophic injury cases to verdict during his twenty five years in practice, the first seven years of which was spent defending physicians in medical malpractice actions. Since moving to the plaintiffs' side in 1996, Mr. Lawn has secured substantial verdicts and settlements for injured victims and their families in a large variety of medical malpractice actions, as well as actions arising from motor vehicle accidents, defective products, work place accidents and other acts of individual and corporate negligence.

Mr. Lawn has been inducted as a Fellow of the American College of Trial Lawyers. He has been repeatedly selected as a Top 100 *Pennsylvania Super Lawyer* and for inclusion in *The Best Lawyers in America*. Mr. Lawn frequently lectures on civil litigation issues, having given such presentations for the Pennsylvania Bar Institute, the Pennsylvania Association for Justice, The Philadelphia Trial Lawyers Association and the National Business Institute. He teaches trial advocacy skills to other lawyers as an Instructor with the National Institute of Trial Advocacy, and for ten years taught an accredited course in advanced trial advocacy at the Beasley Law School of Temple University. In addition to being a Fellow of the American College of Trial Lawyers, Mr. Lawn is a member of the Board of Directors/Secretary of the Philadelphia Trial Lawyers Association and the American Board of Trial Advocates, for which he was selected to serve as the 2013 President of the Eastern PA chapter.

SESSION IV

3:30 p.m. – 4:45 p.m.

Professional Development Panel – Paralegal Survival Guide

Whether novice or dinosaur, this session will offer day-to-day endurance tips to both new paralegals and senior paralegals alike. We will cover how to handle overhearing your coworker engaging in the unauthorized practice of law and working for someone with a substance abuse problem. Attendees will learn tips to avoid being laid off and to make yourself more valuable, and leave with new ideas for managing billable hours or workflow, along with e-mail and social media -- and juggling it all with a smile.

1.25 NFPA CLE Credits Pending

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THE PANEL:

Lisa Ricchezza, Paralegal Manager
Dechert LLP



Ms. Ricchezza served as President of The Philadelphia Association of Paralegals from 1987-1988. She joined PAP in 1984 and became an active member of the Public Relations committee. She was elected to the Board of Directors in 1985 and remained a member of the Board through 1991. Ms. Ricchezza also served as Chairperson of the Public Relations Committee, Treasurer (1989) and Committee Chair for the NFPA Annual Conference held in Philadelphia in 1990.

She was a member of the Board of Directors of Philadelphia VIP from 1990 - 1998. Ms. Ricchezza received her B.A. in Criminal Justice from LaSalle University and a General Practice certificate from the Institute for Paralegal Training. She has practiced as a litigation paralegal since 1980 and a paralegal, paralegal coordinator and administrator at Dechert LLP since 1986. In 2009, she took on a firm-wide roll and is now the Firm Wide Paralegal Manager responsible for paralegals in 22 offices throughout the world. Currently, Ms. Ricchezza is active member of the Philadelphia Chapter of the International Paralegal Managers Association.

THE PANEL *(Continued)*:

Karen Roberts, Human Resources Director Flaster/Greenberg PC



Ms. Roberts manages all human resources functions within the firm, including employee relations and retention, benefits and compensation, employment, planning and policy implementation and new employee orientation. She additionally manages lateral attorney and law student recruitment activities.

Prior to joining Flaster/Greenberg, Ms. Roberts served as the employment manager at Amerigas Propane in Valley Forge, PA. Previously she served as the Recruiter at Dechert LLP in Philadelphia, Pennsylvania. She has also performed as a consultant in the areas of recruiting, training and staffing.

Ms. Roberts received a B.S. in Finance from Pennsylvania State University in State College, Pennsylvania. She holds a certificate in Human Resource Management from Villanova University and a certificate in Recruitment and Retention from the Society of Human Resource Management (SHRM).

She is a member of the Society of Human Resource Management (SHRM), Tri-State Human Resource Management (TSHRMA) as well as the South Jersey section of the Association of Legal Administrators (ALA).

Joseph Samarco, MBA, Director of Revenue Operations Drinker Biddle & Reath LLP



Prior to working for Drinker Biddle & Reath, Mr. Samarco was the administrator and accounting manager for Spector Gadon & Rosen. He brings 19 years of legal management experience to his current role, where he manages the firm-wide revenue cycle for over 600 lawyers and 13 office locations. Working with the executive management team, COO, CFO and Managing Partners, he deals with a broad range of issues ranging from revenue recognition, process improvement, financial reporting, forecasting, AFAs, pricing strategies and acquisition integration.

An active volunteer, Mr. Samarco contributes to professional organizations such as the Association of Legal Administrators (ALA), where he is the immediate past president of the Philadelphia Chapter and he was recently appointed to the ALA's National Committee the Annual Nominating Committee. He also chairs the Elite (accounting program) meetings in Philadelphia and, in his spare time, Mr. Samarco is an active supporter of reading programs for young children.

Mr. Samarco has a Bachelor's degree from Penn State University and an MBA from DeVry University's Keller Graduate School of management.

SESSION IV

3:30 p.m. – 4:45 p.m.

***Real Estate –
Recent Amendments to Article 9 of
the Uniform Commercial Code***

The Uniform Commercial Code (UCC), Article 9 governs secured transactions in personal property. UCC9 was substantially revised in 1998 and adopted in all states. The 2010 Amendments to UCC9 modify the existing statute to respond to filing issues and address other matters that have arisen in practice following a decade of experience with the 1998 version of UCC9. Of most importance, the 2010 Amendments provide greater guidance as to the name of an individual debtor to be provided on a financing statement. Amendments were also made with respect to changing and continuing the perfection; changes to the UCC forms; and changes related to electronic transactions. Learn the fundamentals of acquiring a security interest, including how to attach, to perfect (filing and non-filing methods) and to gain (and maintain) priority in the collateral of choice.

1.25 NFPA CLE Credits Pending

1.25 Keystone Alliance CLE Credits Pending

Marcy Hart, Esquire
Flaster/Greenberg PC



Ms. Hart is a shareholder and member of Flaster/Greenberg's Real Estate and Land Use practice group. She brings a depth of experience in real estate and transactional matters, representing local and national developers and investors in the acquisition, development, financing, repositioning and disposition of every class of real estate asset including, office, warehouse, apartment, hotel, retail and residential. Ms. Hart has extensive experience in structuring and documenting real estate transactions and negotiating joint ventures, equity as well as senior and subordinated debt on behalf of developers and investors.

She received her B.A. degree in English from Wellesley College, her J.D. From Villanova Law School and is a member of the Pennsylvania and New Jersey bars.

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The Philadelphia Association of Paralegals'

Annual Education Conference

Friday, September 12, 2014

PBI CLE Conference Center – 10th Floor
Wanamaker Building – Philadelphia, PA

PARKING

Discounted parking (\$14 for up to ten hours) is available in the Five Star Basement Parking Garage (Juniper Street). To request a parking voucher, send us an e-mail at education@philaparalegals.com by August 29th.

DIRECTIONS

The Wanamaker Building

Enter the Wanamaker Building from Juniper Street and proceed up the escalators to the right. At the top of the escalator, turn around to the right. Walk past the guard station to the list of PBI seminars. Take the adjacent elevators to the 10th floor. The CLE Conference Center is directly across the hall from the elevator.

From Northern & Western Suburbs

Take I-76 East (Schuylkill Expressway) to Exit 344 / Rte. 676 East. Follow signs to Central Philadelphia. Take 676 East and exit at Broad St. / Rte. 611. Turn right onto Broad St. heading south and proceed to City Hall. Stay in the middle to left lanes of traffic. Circle around City Hall to the right. After completing 1/2 of the circle and traveling through two signal lights, get into the extreme right lane to veer right onto Juniper Street. The basement parking garage (Five Star Parking) will be located on your immediate left as you veer onto Juniper Street.

From Pennsylvania Turnpike/From the North or the East:

Follow PA Turnpike to exit signs for I-476 South, Exit 327 or 25A, depending on which direction you are traveling. Take I-476 South to Exit 16A / I-76 East to Philadelphia. Stay on I-76 East for approximately 12 miles. Exit at #344/Rte. 676 East. Take 676 East and exit at Broad St./Rte. 611. Turn right onto Broad St. heading south and proceed to City Hall. Stay in the middle to left lanes of traffic. Circle around City Hall to the right. After completing 1/2 of the circle and traveling through three signal lights, and passing South Broad Street, get into the extreme right lane to veer right onto Juniper Street. The basement parking garage (Five Star Parking) will be located on your immediate left as you veer onto Juniper Street.

From the West:

Follow PA Turnpike to exit 326 (old exit 24) (Valley Forge exit) and the Schuylkill Expressway. This is Route 76 East to Philadelphia. Stay on I-76 East for approximately 12 miles. Exit at #344/Rte. 676 East. Take 676 East and exit at Broad St./Rte. 611. Turn right onto Broad St. heading south and proceed to City Hall. Stay in the middle to left lanes of traffic. Circle around City Hall to the right. After completing 1/2 of the circle and traveling through three signal lights, and passing South Broad Street, get into the extreme right lane to veer right onto Juniper Street. The basement parking garage (Five Star Parking) will be located on your immediate left as you veer onto Juniper Street.

From I-95

Take I-95 to Exit 22 Central Philadelphia / Rte. 676. Follow signs for Callowhill Street. Take Callowhill St. to Vine St. / Local Traffic Lane (you will be heading west). Turn left onto Broad Street heading South and proceed to City Hall. Stay in the middle to left lanes. Circle around City Hall to the right. After completing 1/2 of the circle and traveling through two signal lights, get into the extreme right lane to veer right onto Juniper Street. The basement parking garage (Five Star Parking) will be located on your immediate left as you veer onto Juniper Street.

From Philadelphia International Airport

Take I-95 to Exit 22 Central Philadelphia / Rte. 676. Follow signs for Callowhill Street. Take Callowhill St. to Vine St. / Local Traffic Lane (you will be heading west). Turn left onto Broad Street heading South and proceed to City Hall. Stay in the middle to left lanes. Circle around City Hall to the right. After completing 1/2 of the circle and traveling through two signal lights, get into the extreme right lane to veer right onto Juniper Street. The basement parking garage (Five Star Parking) will be located on your immediate left as you veer onto Juniper Street.

From New Jersey

Take Ben Franklin Bridge (Rte. 676) to Philadelphia. Follow signs to Vine Street / Local Traffic (you will be heading west). Turn left onto Broad Street heading South and proceed to City Hall. Stay in the middle to left lanes. Circle around City Hall to the right. After completing 1/2 of the circle and traveling through two signal lights, get into the extreme right lane to veer right onto Juniper Street. The basement parking garage (Five Star Parking) will be located on your immediate left as you veer onto Juniper Street.

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The Philadelphia Association of Paralegals' 2014 Education Conference

Friday, September 12, 2014
The Pennsylvania Bar Institute
The Wanamaker Building
100 Penn Square East
Philadelphia, Pennsylvania 19107

REGISTRATION FORM

Registration Deadline is August 29, 2014
(Limited Space will be available for walk-ins)

NAME OF REGISTRANT: _____ (Print Clearly)

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

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

Animal Law: Is The Law Going To The Dogs?	Seminar Room B	_____
Instructor: Nadia Adawi, Esquire, M.B.A.		
Immigration: The Ethics of it All – Hot Topics in Immigration Law	Faculty Training Room	_____
Instructor: Wendy Castor Hess, Esquire		
Litigation: Medicare Secondary Payer Compliance	Seminar Room A	_____
Instructor: Leslie Schumacher, RN, CRRN, LNCC, CLCP, LNLCP, MSCC, CMSP		
Technology: BYOD (Bring Your Own Device): It's Here...Deal With It	East Conference Room	_____
Instructor: Gilbert Marquez, Law Firm Administrator		

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

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

Corporate: The Anatomy of a Standard Contract	Faculty Training Room	_____
Instructor: Rachel Branson, Esquire		
Estates & Trusts: Special Needs Trusts/Planning & Operation	Seminar Room B	_____
Instructor: Linda Anderson, Esquire, CELA		
Intellectual Property: Recent Intellectual Property Cases	Seminar Room A	_____
Instructor: Wendy Reczek, Pa.C.P.		
Legal Writing: Clear, Concise Writing In the Law Office	East Conference Room	_____
Instructor: Nicholas Staffieri, 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: Fiduciary Litigation	Seminar Room B	_____
Instructor: Ryan Gager, Esquire		
Intellectual Property: Patent Monetization	Seminar Room A	_____
Instructor: Clark Jablon, Esquire		
Litigation: Time Management – Making the Most of Your Time	East Conference Room	_____
Instructor: Ellen Freedman, CLM		
Real Estate: Hot Topics in Land Use Law	Faculty Training Room	_____
Instructor: Carl Primavera, Esquire		

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: The Three R's of Ethics	Seminar Room B	_____
Instructor: Valerie Wilus, R.P., Pa.C.P.		
Litigation: Working Up Today's Medical Malpractice Cases	Seminar Room A	_____
Instructor: Timothy Lawn, Esquire		
Professional Development: Panel Discussion – Paralegal Survival Guide	East Conference Room	_____
Instructors: Lisa Ricchezza/Karen Roberts/Joseph Samarco		
Real Estate: Recent Amendments to Article 9 of the Uniform Commercial Code	Faculty Training Room	_____
Instructor: Marcy Hart, Esquire		

SEMINAR FEES

PAP MEMBER Full Day Rate (Includes participation in all four sessions and lunch) *	\$165.00
PAP MEMBER Half Day Session (Includes participation in two consecutive sessions with lunch)	\$130.00
ATTORNEY/NON MEMBER Full Day Rate (Includes participation in all four sessions and lunch)	\$200.00
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STUDENT Full Day Rate (Includes participation in all four sessions and lunch)	\$95.00
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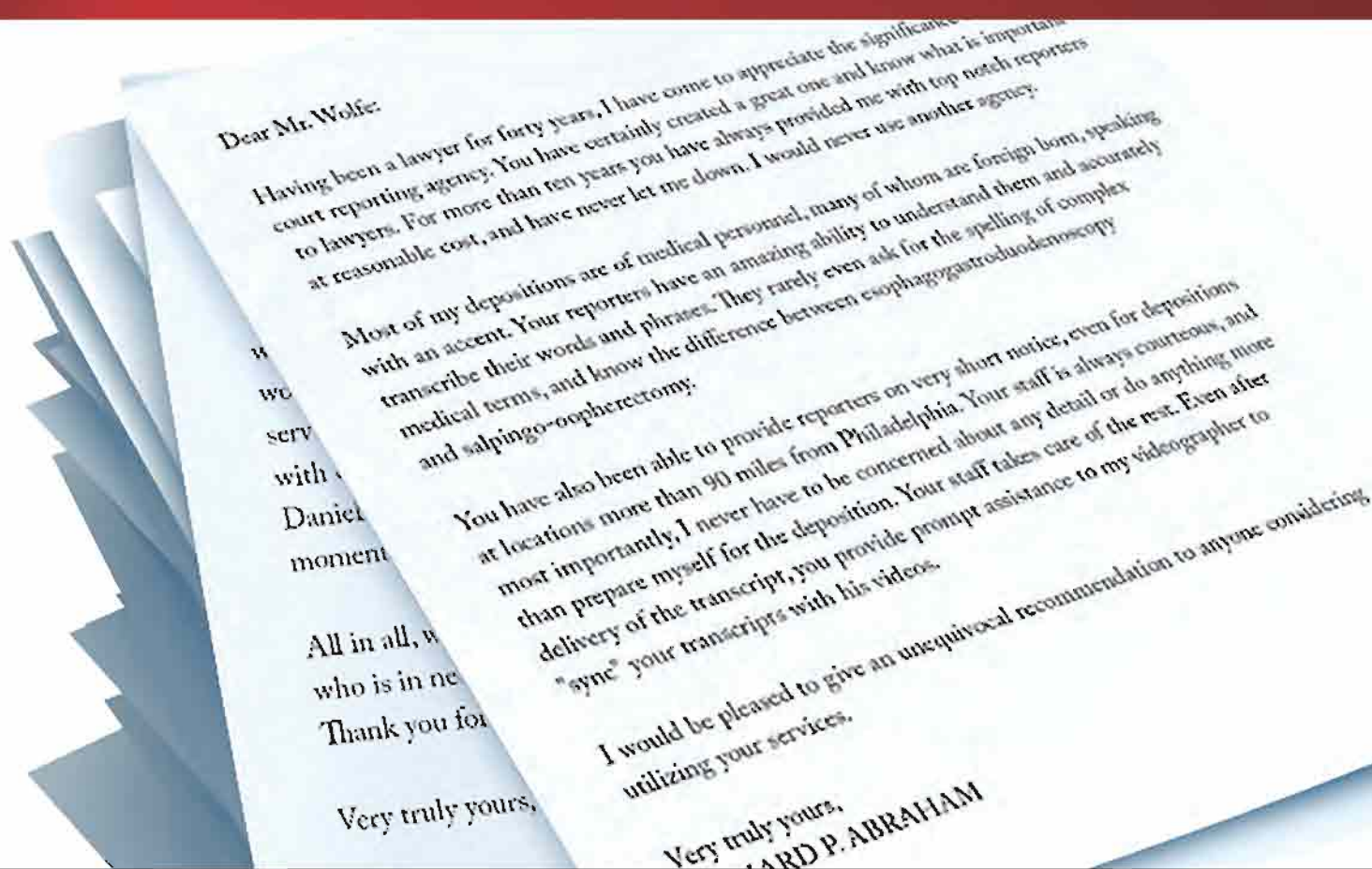
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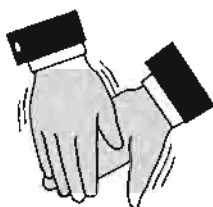
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