

A composite image featuring a blue sky with a tall telecommunications tower in the upper half and a glass skyscraper (The Comcast Center) in the lower half, set against a cityscape.

# The Philadelphia Association of Paralegals' EDUCATION CONFERENCE

*The Art of Being a Paralegal*

Friday, October 23, 2015  
The Pennsylvania Bar Institute  
The Wanamaker Building  
100 Penn Square East  
Philadelphia, Pennsylvania 19107

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# THANK YOU

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\*Steven Rosner and Brendan McGinley are our contacts. Heaven Sent sponsored our 2Q luncheon.

\*\*Jeff Love and Heather McDonald are our contacts. Love sponsored our 2015 inaugural scholarship in honor of Mary L. Creekmore at the 1Q luncheon and will also sponsor this year's pro bono award, for the third year in a row.

NOTE: Love Court Reporting is now a Veritext Company.

# The Philadelphia Association of Paralegals' Annual EDUCATION CONFERENCE

Friday, October 23, 2015

The Pennsylvania Bar Institute Conference Center - 10<sup>th</sup> Floor

The Wanamaker Building

100 Penn Square East

Philadelphia, Pennsylvania 19107

## SCHEDULE OF EVENTS

***Registration: 8:00 AM – 9:00 AM***

10th Floor Reception Area

Continental Breakfast: 8:00 am – 9:00 am

(Sponsored by Peirce College)

***Session I: 9:00 AM – 10:15 AM***

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

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***Session II: 10:45 AM – 12:00 PM***

\*\*\*\*\*

***Luncheon: 12:00 PM – 2:00 PM***

Keynote Address by

A. Harold Datz, Esquire

The Crystal Tea Room

9th Floor

\*\*\*\*\*

***Session III: 2:00 PM – 3:15 PM***

***Afternoon Break: 3:15 PM – 3:30 PM***

(Sponsored by The Legal Intelligencer)

***Exhibitor Raffles: 3:15 PM – 3:30 PM***

***Session IV: 3:30 PM – 4:45 PM***

\*\*\*\*\*

**EXHIBIT AREA: 8:00 AM – 4:45 PM**



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# THE PRESIDENT'S MESSAGE

On behalf of The Philadelphia Association of Paralegals, we are extremely excited to be able to host this year's Education Conference at the Pennsylvania Bar Institute. It promises to be a fun-filled day of learning and networking!

*The Art of Being a Paralegal* is the theme of this year's Education Conference. What do we mean by saying that being a paralegal is an art? Well, according to the Merriam-Webster dictionary, an "art" is "new skills acquired by experience, study and observation," which is exactly what we hope you will gain by attending this Conference.

We are excited to have A. Harold Datz, Of Counsel to Haggerty, Goldberg, Schleifer & Kupersmith, P.C., as this year's keynote speaker. Mr. Datz is a well-known trial attorney and has represented individuals in a wide variety of personal injury matters. He is a member of the Philadelphia Trial Lawyers Association, the Pennsylvania Association for Justice, the American Association for Justice, the Pennsylvania Bar Association and the Philadelphia Bar Association, and in 2012, was appointed to serve as a member of the Pennsylvania Bar Association Judicial Evaluation Commission. Mr. Datz also serves as a Senior Hearing Committee Member for the Disciplinary Board of the Supreme Court of Pennsylvania. We are thrilled that Mr. Datz has graciously given of his time to share with us his views and experiences.

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. Please see the Registration Form of this brochure for an outline of our outstanding lineup of seminars. We anticipate that by the Conference date, each course will be approved by The National Federation of Paralegal Associations and the Keystone Alliance of Paralegal Associations for 1.25 continuing legal education credits each. 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 2015 Education Conference!

Sincerely,

A stylized, handwritten signature in black ink that reads "Vivian". The script is elegant and cursive, with the first letter 'V' being particularly large and decorative.

**Vivian Luckiewicz, RP®, Pa.C.P.**  
2015 President

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# ASSOCIATION ACKNOWLEDGMENTS

We would like to thank the Education Committee members, Theresa Coger, Karen Daemer, Lisa Dean, Christine Flynn, Vivian Luckiewicz, Loretta Nocella, Mary Lou O'Connell, Victor Panieczko, Desiree Purvenas-Hayes, Harry Reichner, Judy Stouffer, and Tamika Way for their assistance with the organization of The Philadelphia Association of Paralegals' 2015 Education Conference. Special thanks to volunteers Debra Fox, Jere Jones, Diana Kirkland, and Michelle Long.

We also want to acknowledge our Keynote Speaker, A. Harold Datz, Esquire 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:

## 2015 EDUCATION CONFERENCE SPONSORS

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We would like to extend a special thank you to law firms of Berner Klaw & Watson and Saul Ewing, Independence Blue Cross and Modern Moth Media for all of their extra support.

The logo for Lyndora is written in a stylized, cursive script font.

**Lyndora Patterson Tiller**  
Education Committee Chairperson

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# KEYNOTE SPEAKER



A. Harold Datz, Esquire is currently Of Counsel to Haggerty, Goldberg, Schleifer & Kupersmith, P.C. He is a trial attorney admitted to practice in Pennsylvania, and represents individuals in a wide variety of Personal Injury matters. Mr. Datz's practice is concentrated in the areas of Automobile Liability and Premises Liability claims.

Mr. Datz has litigated hundreds of cases on behalf of individuals against insurance companies. These disputes range from motor vehicle accidents to improper claims denials to complex catastrophic injury matters. He holds an AV rating from Martindale Hubbell. Prior to entering private practice, Mr. Datz served as an Assistant District Attorney in Philadelphia.

Mr. Datz is an active member in many national and local organizations. As a member of the Philadelphia Trial Lawyers Association, he served on the organization's Board of Directors from 1983 until 2013. In 1991, he was the recipient of the organization's President's Award for Distinguished Service. In 1998, he was designated as a Board Member Emeritus. Mr. Datz currently serves as the Chair of the Bar Elections Committee.

Mr. Datz is a member of the Pennsylvania Association for Justice, the American Association for Justice, the Pennsylvania Bar Association and the Philadelphia Bar Association. Mr. Datz was elected to the Board of Governors of the Philadelphia Bar Association for a three-year term in 1993. He currently is serving as the Vice-Chair the Philadelphia Bar Association's Commission on Judicial Selection and Retention. This marks the twelfth consecutive year of service on the Commission, having previously served as Chair in 2003, 2005, 2006 and 2010, and Vice-Chair in 2003, 2004, and 2009. Additionally, Mr. Datz served as co-Chair of the Philadelphia Bar Association's Alternative Dispute Resolution Committee in 2009. Mr. Datz was also enrolled in the First Judicial District's 2009 Pro Bono Roll of Honor, which recognizes attorneys for their exemplary pro bono work in Philadelphia courts.

Mr. Datz was appointed in 2012 to serve as a member of the Pennsylvania Bar Association Judicial Evaluation Commission. The Commission evaluates and rates candidates seeking election to Pennsylvania's Appellate courts. Mr. Datz currently serves as a delegate to the Pennsylvania Bar Association's House of Delegates, having continuously served in that position since 1999. He also served as a Lawyer Volunteer for TLC (Trial Lawyers Care), representing families of victims of the 9/11 tragedies.

Mr. Datz served as a Senior Hearing Committee Member for the Disciplinary Board of the Supreme Court of Pennsylvania from 2004-2010. He was reappointed for another three year term in July, 2012.

Mr. Datz has served extensively as an arbitrator for the Court of Common Pleas of Philadelphia County and the United States District Court for the Eastern District of Pennsylvania. He has been certified as a mediator for the Court of Common Pleas of Philadelphia County and is listed on the Roster of Neutrals of Settlement Systems, Inc., and National Arbitration and Mediation, Inc. He

has also served as a Judge pro tempore for the Philadelphia Court of Common Pleas. Mr. Datz has acted as an instructor for the National Institute of Trial Advocacy, as well as a moderator and lecturer in various Continuing Legal Education programs.

In 2009, Mr. Datz was chosen by his peers and Super Lawyer magazine as a Philadelphia Super Lawyer.

Mr. Datz received a Bachelor of Arts in History from Temple University in May, 1969. Mr. Datz received his Juris Doctor from the Temple University School of Law in May, 1972, where he served as President of the Student Bar Association.

Mr. Datz is admitted to practice in the Supreme Court of Pennsylvania, the United States District Court for the Eastern District of Pennsylvania, the United States Court of Appeals for the Third Circuit and the Supreme Court of the United States.

# PRIZES!

*All attendees will be eligible to win some great prizes!*

## **PAP MEMBERSHIP:**

- Any member who pays out-of-pocket for their PAP membership will be entered in a drawing to win a free 2016 PAP membership
- Every student attendee will be entered in a drawing to win a free 2016 PAP student membership

## **SCHOLARSHIPS:**

- Enter a drawing for a chance to win one of two NFPA scholarships (PACE or PCCE, depending on which the winner is qualified to sit for)

## **CLEs:**

- Enter for a chance to win a free CLE session from the NFPA

## **PRIZES GALORE:**

- Every attendee will be eligible for raffle prizes (gift certificates to the Field House, Plough & Stars, Scoope DeVille, the River Sharks and so much more!)

# NOTES

[illegible]

# Bad Design is Like a Half-Baked Cake: **NOT READY**

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# MENU SELECTIONS

Friday, October 23, 2015  
Grand Ballroom 12:00 – 2:00 p.m.

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

## CLASSIC GARDEN SALAD

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

## ENTRÉE

### **Chicken Piccante\***

*Pan Seared Chicken Breast with lemon & capers in a white wine butter sauce  
With Fingerling Potatoes and Grilled Seasonal Vegetables*

\*

### **Salmon\***

*With Fingerling Potatoes and Grilled Seasonal Vegetables*

\*

### **Vegetable Strudel**

*Fresh Roasted Vegetables Wrapped in Phyllo Sheets,  
Baked and Topped with Our House Marinara Sauce, Balsamic Drizzle*

## DESSERT

### **Mini Pastry Trio Plate**

*Mini Cannolis, Chocolate Mousse Cup, Lemon Drop Cup*

*Rolls, butter, freshly brewed coffee, decaffeinated coffee and teas*

These dishes are also offered in gluten-free versions.  
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# SESSION I

9:00 AM - 10:15 AM

## CORPORATE

### *Corporate Compliance and Ethics*

This program will survey the concepts and intricacies of Corporate Compliance and Ethics. In most industries, Corporate Compliance and Ethics are areas of growing concern and business risk. Most savvy organizations will have a robust Compliance and Ethics program to mitigate those risks whether legal, regulatory, or contractual. In broad terms we'll consider Corporate Compliance and Ethics as an essential tool to protect your company's and or client's brand, to avoid reputational harm, as well as to avoid consequences of failure to comply with applicable laws and regulations. We will explore common organizational challenges and strategies to execute an effective Corporate Compliance and Ethics program.

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## Robin C.V. Holts, Esquire

*Lincoln Financial Group*

Ms. Holts is Senior Counsel/AVP Legal for the Retirement Plan Services business at Lincoln Financial Group.

Ms. Holts has enjoyed a legal career marked with opportunities in several great American companies in numerous industries. She has had a diverse legal practice. She is an accomplished civil litigator with trial experience in Philadelphia and surrounding counties. Ms. Holts has handled government affairs as well as government contracting in telecommunications, armed security, and in the financial services industries. Prior to joining Lincoln Financial Group, Ms. Holts was a legal consultant to the School District of Philadelphia. She has worked for Allstate Insurance Company, Comcast Corporation, and AlliedBarton Security Services.

Ms. Holts is a graduate of Temple University School of Law and is admitted to practice in Pennsylvania and the United States District Court for the Eastern District of Pennsylvania and passed the New Jersey bar. Prior to Law School, Ms. Holts earned her A.B. in Economics from Vassar College.



# SESSION I

9:00 AM - 10:15 AM

## EMPLOYMENT LAW

*What Paralegals Need to Know in Employment Law*

This seminar will review three key aspects of labor and employment law that paralegals will want to know, including those laws that can affect their careers as paralegals. A general overview of state and federal employment laws, and the most common issues that arise in these cases. The administrative process for employment law claims, and how paralegals can help clients and lawyers navigate through alphabet of agencies that handle these claims, including the EEOC, PHRC, NJDCR, NLRB, OSHA and DOL. Employment laws and claims that commonly involve paralegals as employees.

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### Eric B. Meyer, Esquire

*Dilworth Paxson LLP*

Mr. Meyer is a Partner in the Labor and Employment Practice Group, Chair of the #SocialMedia Practice Group (<http://www.dilworthlaw.com/NewsEvents/PressReleases?find=195804>), and Co-Chair of the Pro Bono Committee. He focuses his practice on employment discrimination and retaliation, workplace harassment, employee pay practices, leaves of absence, disabilities and reasonable accommodations, non-competition and trade secret disputes, employment contracts, reductions in force, severance arrangements and other contractual matters, and union/management relations. Eric also serves as a volunteer mediator for the United States Equal Employment Opportunity Commission and as an arbitrator in the Philadelphia Court of Common Pleas.

He publishes The Employer Handbook, which is consistently voted one of ABA Journal's top labor & employment law blogs. A frequent lecturer around the country, and an influential legal voice on Twitter (Eric\_B\_Meyer), Eric has been quoted in ABCNews.com, NBCSports.com, AMEX's Small Business Open Forum, Inc. Magazine, Business Insurance, Entrepreneur, Mashable.com, and The Wall Street Journal, among other outlets.

# SESSION I

9:00 AM - 10:15 AM

## LITIGATION

### *Construction Litigation*

Mr. Bendesky's firm has earned a national reputation as the country's most specialized and experienced law firm in the representation of victims of construction accidents and construction falls. This session will discuss cross-examination of expert witnesses and witnesses. The focus will be on the importance of researching backgrounds and preparing for cross examination in order to conduct an effective cross-examination. This session will provide insight into the paralegal's key role in preparing for cross-examination of witnesses.

**1.25 NFPA CLE Credits Pending**

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## Larry Bendesky, Esquire

*Saltz Mongeluzzi Barrett & Bendesky*

Mr. Bendesky, the Managing Shareholder at Saltz Mongeluzzi Barrett & Bendesky, P.C., concentrates his practice on complex civil product liability cases, including those involving the operation of elevators, motor vehicles, motorcycles, power tools, and a wide array of equipment used in industry and manufacturing. In addition, he handles litigation involving catastrophic construction accidents.

Mr. Bendesky has been a member of Super Lawyers of Pennsylvania, a peer-selected group of practitioners from around the Commonwealth, every year of eligibility since 2004. He is considered among the Commonwealth's premier product liability and construction accident attorneys. This year, he was selected as one of the 100 best lawyers in both Philadelphia and in the Commonwealth of Pennsylvania. Every year since 2009, Mr. Bendesky was named one of the Best Lawyers in America by Best Lawyers, the nation's oldest peer-review publication for the legal profession. Evaluations were based on more than two million detailed evaluations of lawyers by other lawyers.

As a trial lawyer, Mr. Bendesky has been lead or co-counsel in numerous high-profile, highly complex cases. He has handled more than ninety cases resulting in verdicts or settlements over \$1 million. He served as trial counsel in the Tropicana Casino structural collapse litigation, which settled for \$101 million, the largest settlement of a construction accident case in American history.

A strong advocate for continuing professional education, Mr. Bendesky has lectured more than 50 times to lawyers, Judges and other professional groups on trial techniques, cross-examinations, evidence and the latest developments in product liability and construction litigation.

# SESSION I

9:00 AM - 10:15 AM

## LITIGATION

### *Life Care Plan Expert*

What is a life care plan? When is it needed in a case? How do you retain a life care plan expert? A life care planner is an expert who develops and quantifies plans of care for injured persons. They include the cost of future medical care and other services and items needed to assist the injured party (e.g., medications, home accommodations, care, transportation and other assisted living expenses). In this session, our speaker will provide tips for identifying when a life care plan expert is needed in a case, how to locate and retain a life care plan expert, what documents are needed for review, the importance of interviews and meetings with clients, issuance reports, testimony, etc.

**1.25 NFPA CLE Credits Pending**

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## Jody M. Masterson, RN, MSN, CRRN, FIALCP

*Villanova University*

Ms. Masterson, RN, MSN, CRRN, FIALCP has been a certified rehabilitation registered nurse and life care planner since 1999 providing life care planning, expert testimony, medical-legal review, case analysis, case management and Special Needs Trusts life care plan implementation. She has a Bachelor's and Master's degree in nursing from Villanova University and has worked in various clinical settings including medical-surgical, orthopedic, cardiac and rehabilitation units. She has prepared life care plans for litigation and/or settlement purposes for both the pediatric and adult populations with catastrophic injuries, illnesses and/or disabilities.

Ms. Masterson has testified in both state and federal courts in Pennsylvania, Delaware, New York, New Jersey and Maryland. She is a past president of the Greater Philadelphia Chapter of ARN, and continues to be active in the local chapter and at the National ARN level. In 2004 she was awarded the Fellow status in the International Academy of Life Care Planners. She has been an adjunct clinical nursing professor at Villanova University since 1993.

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# SESSION II

10:45 AM - 12:00 PM

## ANIMAL LAW

*Become a Participant in Public Policy on Behalf of Animals*

One law can change the lives of thousands of animals! Develop the skills and resources to become an effective participant in public policy on behalf of animals. This course will discuss many of the numerous animal-related bills currently pending in the Pennsylvania Legislature and specific productive actions each of us can take to help get as many of these bills passed as possible and to advocate for humane laws.

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## Elissa B. Katz, Esquire

*Meranze Katz Gaudio & Newlin*

Ms. Katz is a partner in the Philadelphia law firm of Meranze Katz Gaudio & Newlin, P.C. She received her B.A. in Political Science from the George Washington University and J.D. from Temple University School of Law. She is licensed to practice law in both Pennsylvania and New Jersey and is a member of the Pennsylvania, Philadelphia and New Jersey Bar Associations. She is a member of the Animal Law Committee of the Pennsylvania Bar Association.

Ms. Katz is the President of Humane PA PAC, Pennsylvania's political voice for animals. Humane PA PAC is a non-partisan committee working to end cruelty to animals in Pennsylvania through public policy. Ms. Katz currently serves on the Board of Directors of Woodstock Farm Sanctuary and previously served on the Board of The Humane League. Ms. Katz volunteers with the Northeast Animal Rescue and Philadelphia Animal Welfare Society (PAWS).

# SESSION II

10:45 AM - 12:00 PM

## ESTATES & TRUSTS

*Understanding Oil, Gas and Mineral Rights in an Estate*

This session will provide a brief overview of the complexities of valuing, keeping tax records for, and transferring oil, gas and mineral rights in an estate. Topics will include the definition of “Mineral Estate” and the difference between oil, gas and mineral rights. Mr. Karabin will explain valuation methods for fiduciaries, in particular, leasing income, royalty income and royalty income projections based on well production decline curve models. In addition, Mr. Karabin will explore unconventional wells versus conventional wells in an estate, and the concept of severability.

**1.25 NFPA CLE Credits Pending**

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## Steven M. Karabin, Founder/CEO

*The Rhino Group*

As the Founder/CEO of The Rhino Group, the focus of Mr. Karabin’s work is dedicated to helping individual landowners and landowner groups who own parcels of property within the Marcellus/Utica Shale regions of PA, OH and WV. Typical clients include individual landowners, timber companies, large farms, hunting/fishing clubs, universities, royalty trusts and other charitable institutions. Mr. Karabin also collaborates with Law firms and CPA firms representing clients who benefit from his oil, gas and mineral management knowledge and experience.

Mr. Karabin has an extensive broad range of diversified hands on experience in the oil & gas industries. Earned a B.S. Petroleum & Natural Gas Engineering from The Pennsylvania State University and previously worked for major oil & gas companies such as Shell, Exxon, and Chevron as a drilling engineer and reservoir engineer. He is also a Registered Landman and an active member of the American Association of Professional Landman, as well as the Society of Petroleum Engineers and National Association of Royalty Owners. Mr. Karabin is a Veteran of the United States Marine Corps. and is an active volunteer with the Wounded Warrior Project.



# SESSION II

10:45 AM - 12:00 PM

## INTELLECTUAL PROPERTY

*Trademark - Who We Are and What We Do*

The presentation will consist of an overview of the structure of the Trademarks Office, with a brief explanation of their functions and of the registration process. There will be a detailed discussion of the process of prosecuting an application, from filing the application through refusals, requirements and registration. Typical prosecution issues will also be discussed. Time permitting, general questions about Trademark prosecution will be taken.

**1.25 NFPA CLE Credits Pending**

**1.25 Keystone Alliance CLE Credits Pending**

## Renee Servance, Esquire

*United States Patent and Trademark Office*

Ms. Servance is a Supervisory Senior Attorney with the United States Patent and Trademark Office. She joined the Trademarks Office as an Attorney Advisor in 2006. As an Attorney Advisor, Ms. Servance handled applications for federal trademark registration, where she made legal determinations as to compliance with the Lanham Act.

In 2011, Ms. Servance became a Supervisory Senior Attorney. As a Supervisory Senior Attorney, she manages examining attorneys, and provides training, consultation, and legal advice to the Trademark Office in all areas of substantive and procedural trademark law. As part of the Trademarks organization, Ms. Servance has participated in numerous special projects, including serving as an intellectual property specialist with the Indian Arts and Crafts Board. She is a member of the Bar in the states of Maryland and Wisconsin.

# SESSION II

10:45 AM - 12:00 PM

## TECHNOLOGY

### *Data Security and Privacy in Legal Practices*

This presentation will focus on data security and protecting client confidential information both within legal organizations and through the discovery process. It will include an overview of the cyber threat landscape as it applies to legal professionals, as well as the relationship between security, privacy and e-discovery. The speaker will review relevant ethical and common contractual obligations of legal professionals and their agents/vendors as to data security and privacy, and discuss best practices to mitigate and respond to cyber incidents.

**1.25 NFPA CLE Credits Pending**

**1.25 NFPA CLE Ethics Credits Pending**

**1.25 Keystone Alliance CLE Credits Pending**

## Edward J. McAndrew, Esquire

*United States Attorney's Office for the District of Delaware*

Mr. McAndrew is an Assistant United States Attorney in the U.S. Attorney's Office for the District of Delaware. He serves as the Office's Cybercrime Coordinator and National Security Cyber Specialist. Prior to his current posting, he was a member of the Cyber Crime Unit of the U.S. Attorney's Office for the Eastern District of Virginia. Over the past nine years, Mr. McAndrew's work has spanned every area of Internet-based and technology facilitated crimes. His cases involve computer network intrusions and attacks, economic and industrial espionage, identity and intellectual property theft, financial, government contracting, and tax fraud, money laundering, cyberstalking, witness intimidation and online child exploitation.

Mr. McAndrew serves by appointment on the Delaware Supreme Court's Commission on Law and Technology. As the leader of the Commission's Data Security Working Group, he developed the Commission's "Leading Practices: Data Security" and participates in educational programs relating to data security and privacy for lawyers and legal services organizations.

Prior to joining the U.S. Department of Justice, Mr. McAndrew was a litigation partner at Reed Smith LLP, in Washington, D.C. Mr. McAndrew began his legal career in Wilmington, as a law clerk to Judge Collins J. Seitz, of the U.S. Court of Appeals for the Third Circuit.

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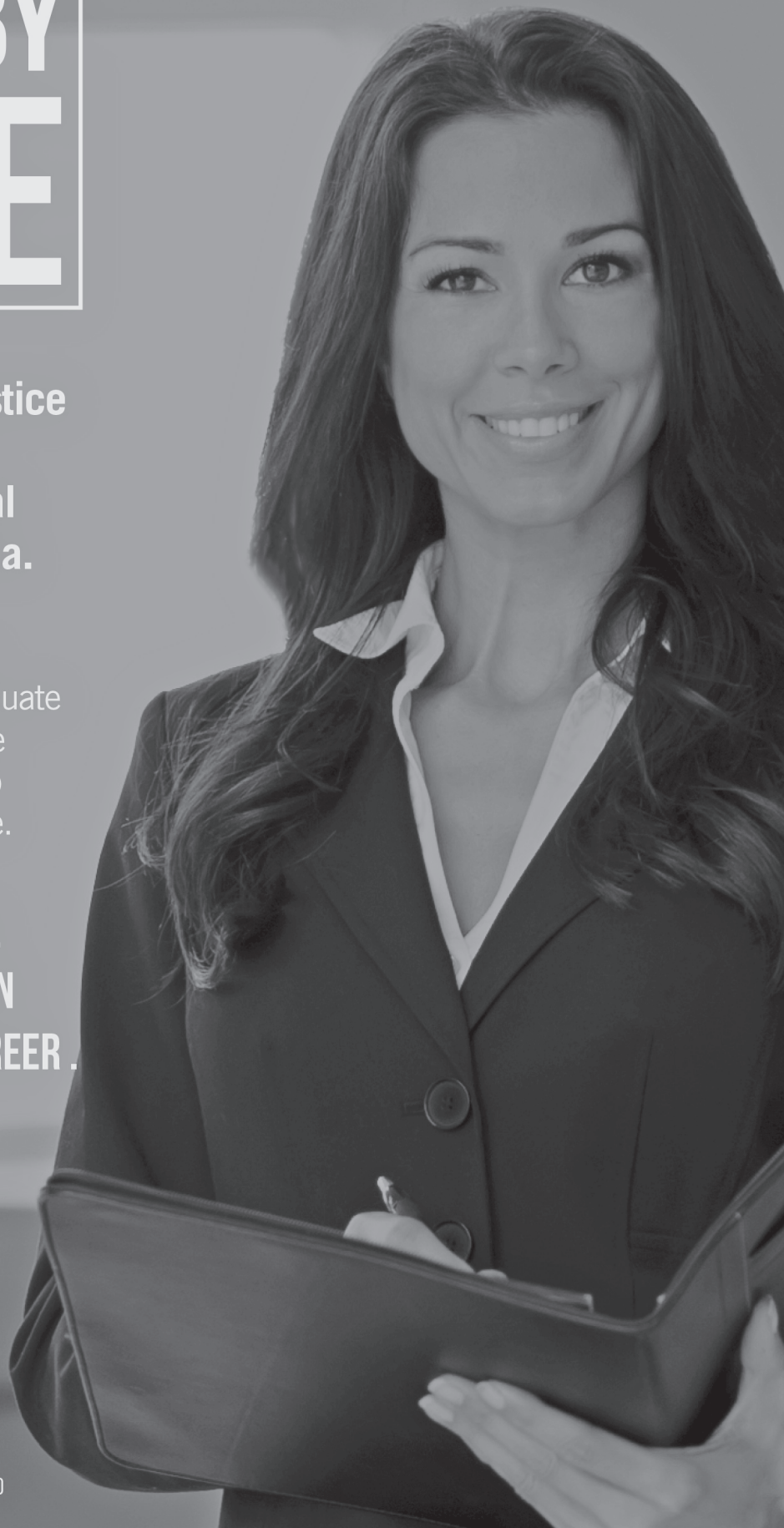
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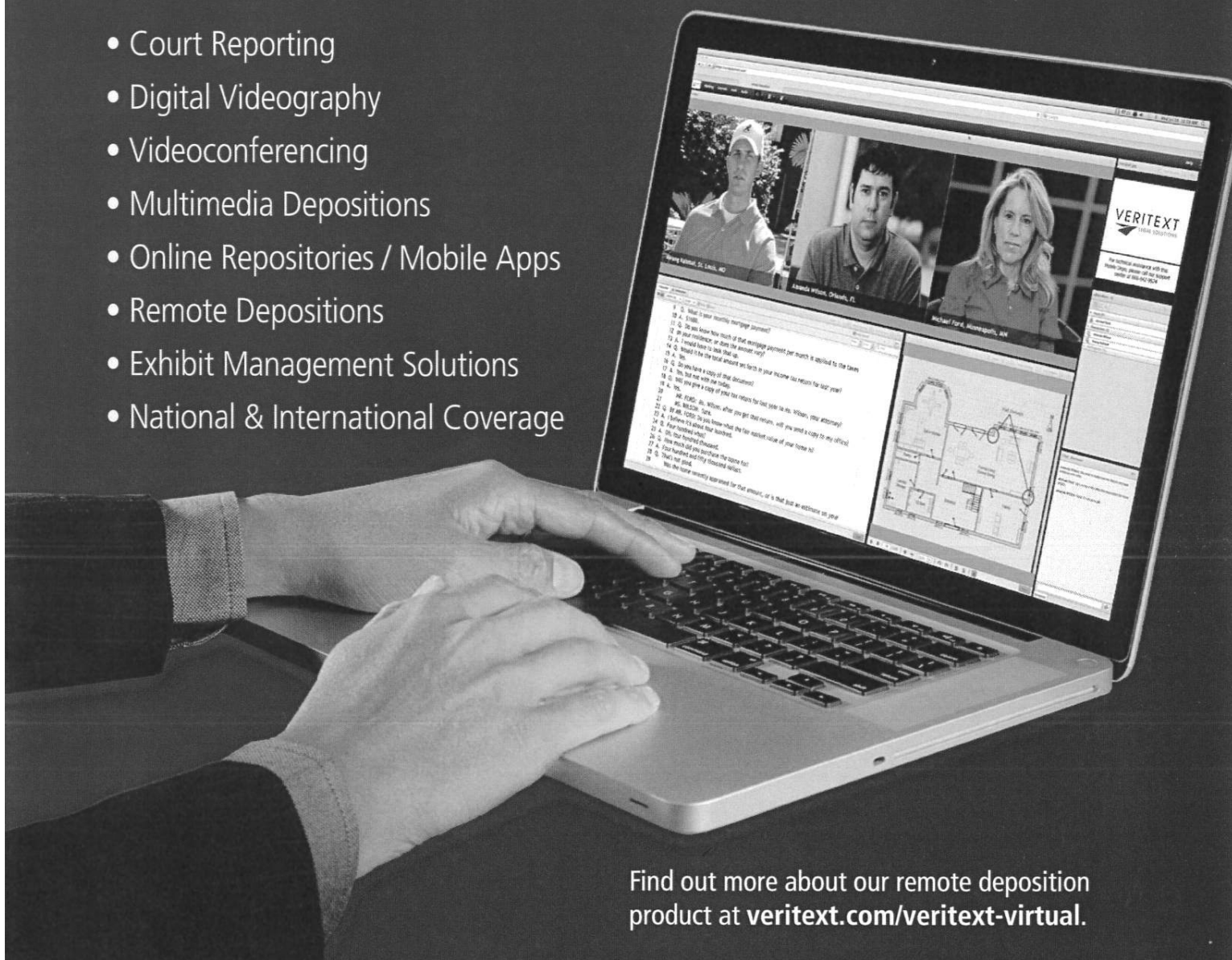




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# SESSION III

2:00 PM - 3:15 PM

## ESTATES & TRUSTS

### *Small and Insolvent Estate Administrations*

When an estate is small (or insolvent), the focus often shifts from serving the beneficiaries to protecting the executors or administrators from possible personal liability to creditors. This session will look at the rights of creditors and beneficiaries under Pennsylvania law, the potential liabilities of the personal representative under both Pennsylvania and federal law (for federal taxes and other federal claims), and the steps that can be taken to protect the personal representatives from those potential liabilities. Because estates are sometimes insolvent because of assets passing outside of the estate, such as through trusts, joint ownership, transfer on death designations, individual retirement accounts, and other arrangements, the potential liabilities of the beneficiaries of those assets will also be discussed, along with the role (if any) of the personal representative in dealing with those assets and any claims to those assets.

**1.25 NFPA CLE Credits Pending**

**1.25 Keystone Alliance CLE Credits Pending**

## Daniel B. Evans, Esquire

*Evans Law Office*

Mr. Evans received his J.D., cum laude, from the University of Pennsylvania Law School and practices law in Glenside, mainly in the areas of estate planning, estate and trust administration, and related tax planning for closely held businesses. He also serves as a consultant to Leimberg & LeClair, Inc., Bryn Mawr, to develop and support software for lawyers and estate planners. Mr. Evans is a Fellow of the American College of Trust and Estate Counsel, is active in the Pennsylvania and Philadelphia Bar Associations, and has written and spoken extensively on estate planning, estate and trust administration, and legal technology.

Among other things, he is a past chair of the Real Property, Probate and Trust Law Section of the Pennsylvania Bar Association. Mr. Evans is the author of two books; "Wills, Trusts, and Technology: An Estate Lawyers Guide to Automation" and "How to Build and Manage an Estates Practice", both published jointly by the Real Property, Probate and Trust Law and Law Practice Management Sections of the ABA, and both in their second editions. He is also the publisher of Evans Estate Law Resources (<http://resources.evans-legal.com>) and his complete resume, along with many of his writings, can be found at his website.

# SESSION III

2:00 PM - 3:15 PM

## ETHICS

### *Everyday Ethics for Paralegals*

This presentation will examine the paralegal's ethical role within the practice of law. The presentation will focus on three critical areas: Confidentiality, Fiduciary Duty and the Rules. Being a paralegal is like no other job in the world. Clients, attorneys and third-parties place extremely high levels of trust in paralegals. This presentation will discuss key issues for paralegals as they face the "minefield" of ethical issues they will certainly confront in their career. We will review some hypothetical situations as we consider how to approach your profession as the ethical person they strive to be.

**1.25 NFPA CLE Ethics Credits Pending**

**1.25 Keystone Alliance CLE Credits Pending**

## Brian C. Darreff, Esquire

*Earp Cohn P.C.*

Mr. Darreff has significant litigation experience in a number of fields including product warranty, product liability, personal injury, will contests, probate and trusts, insurance coverage, bad faith, professional malpractice, employment, and general litigation. He also assists clients with estate planning, estate document preparation (including wills and trusts), and probate and estate administration. His clients include Fortune 100 companies and smaller business clients, including family-run businesses, estates, trusts, and individuals.

A native of Philadelphia, Mr. Darreff received his B.B.A. degree from Temple University School of Business Administration and his J.D. from Temple University School of Law. He is admitted and actively practices in the state and federal courts in New Jersey and Pennsylvania. Mr. Darreff is a lecturer for the Insurance Society of Philadelphia and the South Jersey Claims Association.

# SESSION III

2:00 PM - 3:15 PM

## INTELLECTUAL PROPERTY

*Patent – Application Data Sheets, How to Make Changes under the America Invents Act, and Changes under Patent Law Treaty*

This session will focus on how to fill out the various sections of the Application Data Sheet (ADS) for both provisional and nonprovisional applications, how and when to submit a marked up ADS to correct information, and explaining how to avoid common mistakes made in completing the ADS. It will cover how to complete the inventor's oath and micro entity forms, how to make changes to the inventorship and applicant, and other changes under the America Invents Act (AIA). In addition to AIA, it will discuss changes under the Patent Law Treaty (PLT), such as what is required for a filing date after Dec. 18, 2013 and reference filing. There will be an opportunity for questions immediately following.

**1.25 NFPA CLE Credits Pending**

**1.25 Keystone Alliance CLE Credits Pending**

### Janice Tippet, OPAP

*Program Analyst, Office of Patent Application Processing*

Ms. Tippet is a Program Analyst at the Patent and Trademark Office (PTO) in the Office of Patent Application Processing (OPAP), where she translates the existing rules and new legislation into understandable procedures for the processing of incoming patent applications. She has been working with the incoming patent application processing for 22 out of her 26 years at the PTO. In that time, she has established and maintained written procedures for the consistent processing of patent applications, including updates needed when new legislation has been passed. She is very knowledgeable in the Oath/Dec and micro entity provisions of the Leahy-Smith America Invents Act (AIA), as well as the changes to filing date requirements and reference filing provisions of the Patent Law Treaty (PLT).



# SESSION III

2:00 PM - 3:15 PM

## LITIGATION

*Legal Writing in a World of Emails, Texting, Power Points and Professional Blogs*

This course will examine the challenges to legal writing presented by the contemporary use of emails, texting, and other forms of electronic written communication. Pitfalls for the unwary and useful tips for the savvy professional writer will be addressed, with an emphasis on effective professional concision in the contexts of both informational and persuasive writing.

**1.25 NFPA CLE Credits Pending**

**1.25 Keystone Alliance CLE Credits Pending**

### Glenn Barnes, Esquire

*Peirce College*

Mr. Barnes is a Professor of Legal Studies at Peirce College in Philadelphia. He graduated cum laude with a B.A. degree in English and Classics from Cornell University. He received his J.D. degree from Suffolk University School of Law, where he was awarded the Am Jur Award in Tort Law. Professor Barnes began his practice in 1985 as a trial attorney in Boston, Massachusetts. He has his own general civil law practice, concentrating in the areas of business and employment law, commercial and tort litigation, family law, and estate law. He also works as a consultant in various areas of employment law and is a published writer. He has been teaching legal studies since 1994 and has been a member of the Peirce College faculty since May 2003. In 2008, Professor Barnes won the prestigious Peirce College Hamilton Award for Academic Excellence and Integrity. In 2010, he was promoted to full professor.

### Ivy M. Kempf, Esquire

*Peirce College*

Professor Kempf, is a full professor in the Legal Studies Program. She received her J.D. from Rutgers School of Law – Camden. While attending Rutgers School of Law, Professor Kempf was a Dean's Merit Scholar and participated in Hunter Moot Court. She is licensed to practice law in New Jersey and Pennsylvania, and is admitted to practice in the U.S. District Court for the E.D. of Pennsylvania and the U.S. District Court of New Jersey. Professor Kempf's primary instructional focus areas are: Business and Corporate Law, Contract Law, Criminal Law, Legal Research and Legal Writing. She teaches and has designed courses in multiple programs. Professor Kempf is also the co-chair for the college's Writing and Information Literacy Committee.

# SESSION IV

3:30 PM - 4:45 PM

## BANKRUPTCY

### *Student Loans: Treatment in Bankruptcy and Administrative Remedies*

It is critical for paralegals to help clients understand the student loan process. The session will cover the types of loans (federal, state PLUS, Perkins, private), including lifecycles, loan statuses, default and administrative remedies, as well as the treatment of student loans in bankruptcy.

**1.25 NFPA CLE Credits Pending**

**1.25 Keystone Alliance CLE Credits Pending**

## Brent C. Diefenderfer, Esquire

*CGA Law Firm*

Mr. Diefenderfer practices a client-first approach in the practice of law. He identifies multiple courses of action; gives straightforward advice and diligently works to achieve results. He is detailed oriented and ensures his clients' matters are handled correctly, efficiently and in a cost-effective manner. His diverse clientele includes individuals, businesses and government entities in the following representative matters: bankruptcy, debt restructuring & financial "workouts"; asset protection, estate planning, business law, real estate law, civil litigation, debtor/creditor law and military law.

Prior to joining CGA Law Firm, Mr. Diefenderfer served as an active-duty Army Officer and Judge Advocate (JAG) Attorney. He brings to his civilian practice an invaluable and well-rounded experience ranging from advising senior military officers on complex legal issues to litigating contested jury trials. He held the rank of Captain and served as a Trial Defense counsel at Fort Bragg, North Carolina where he defended soldiers of the 82nd Airborne Division and U.S. Army Special Forces Command in over 30 jury and bench trials, many which resulted in acquittals for his clients. In 2005, he deployed to Iraq for a year as part of the elite 101st Airborne Division "Screaming Eagles" and acted as lead counsel for all legal claims brought by Iraqi citizens against the U.S. Government occurring in a 6,000 square mile combat zone. Later Mr. Diefenderfer served as general counsel for his Commanding General and installation's administrative agencies by advising on fiscal, employment and administrative law related matters.

Mr. Diefenderfer received his J.D. from Dickenson School of Law of the Pennsylvania State University. He earned his B.A. from Dickinson College, cum laude and is a Certified Specialist in Consumer Bankruptcy – American Board of Certification.

# SESSION IV

3:30 PM - 4:45 PM

## HEALTH CARE LAW

### *HIPAA Privacy and Cybersecurity: The New Risk Frontier*

The privacy and cybersecurity landscape is becoming more complex in a virtual world of cloud computing, emerging disruptive technology and sharing of big data. With recent cyber-attacks in the health care and other industries like Target, Home Depot, Wyndham Hotel and Sony, we are facing a brave new world. This session will provide legal and regulatory requirements under the Health Insurance and Portability Act of 1996 (HIPAA), HITECH and state law to protect individually identifiable health information, and an overview of the legal issues to proactively or reactively respond to a privacy or cybersecurity threat. The discussion will include practical and legal considerations to protect the attorney-client privilege, provide regulatory notification, address Board and governance issues, and develop a comprehensive and coordinated incident response plan.

**1.25 NFPA CLE Credits Pending**

**1.25 Keystone Alliance CLE Credits Pending**

## Julie E. Haywood, Esquire

*Independence Blue Cross*

Ms. Haywood is Associate Deputy General Counsel at Independence Blue Cross (“Independence”) practicing in the Managed Care area of the Legal Department. Her areas of expertise include hospital, physician and ancillary provider contracting, credentialing, and complex regulatory matters in Pennsylvania and New Jersey. For a number of years, Ms. Haywood has served as lead counsel to Independence and its subsidiaries on implementation of federal HIPAA Privacy, Security, Transaction and Code Sets and National Provider Identifier regulations. With over twenty five years of health care, insurance and managed care experience, Ms. Haywood has also served as counsel to two other managed care companies, a teaching hospital, and the U.S. Department of Health and Human Services, Centers for Medicare and Medicaid Services.

Ms. Haywood received her J.D. from the University of California, Los Angeles School of Law and her B.A. in Economics from the University of Massachusetts, Amherst. She is a member of the Philadelphia Bar Association and America’s Health Insurance Plans. She also teaches civics at a local high school as part of the Advancing Civics Education program of the Philadelphia Bar Association and is active in many school, political and community groups.

# SESSION IV

3:30 PM - 4:45 PM

## PROFESSIONAL DEVELOPMENT

### *Soft Skills for Paralegals*

This interactive workshop will examine the importance of people skills, soft skills, self-management skills, and emotional intelligence. We will explore how these issues factor into obtaining your dream job, improving your job performance, and managing work related challenges. Finally, we will examine some helpful work and career websites and what you need to know about LinkedIn, even if you think you know about it. This workshop will target seasoned legal professionals, new paralegals, and current students.

**1.25 NFPA CLE Credits Pending**

**1.25 Keystone Alliance CLE Credits Pending**

## Carol J. Sherman, Esquire

### *Professor of Legal Studies*

Ms. Sherman is a Professor of Legal Studies at Peirce College. She is licensed in Pennsylvania and New Jersey. Ms. Sherman started her legal career as an associate attorney at an insurance defense firm and later as an associate at a personal injury firm in Philadelphia. Prior to joining Peirce College, Ms. Sherman was the Deputy Managing Attorney and Pro Bono Director at Legal Aid of Southeastern Pennsylvania. At Peirce College, she teaches online and on campus students in courses such as introduction to paralegal studies, legal technology, employment law, family law, torts, workers' compensation, and ethics. She developed Peirce's new Advanced Legal Technology course to ensure that Peirce students are prepared for a competitive job market.

She was the 2012-2013 President of the Mid-Atlantic Academy of Legal Studies in Business (MAALSB). She is currently a staff editor for MAALSB's law journal. Ms. Sherman is the faculty advisor for Peirce College's Legal Studies Student Association. In 2014, the president of Peirce College appointed Ms. Sherman as Chair of Peirce's Diversity and Inclusion Council.

Ms. Sherman is a frequent continuing legal education presenter in Philadelphia, Delaware, Montgomery, and South Jersey. Topics that she was lectured on include: legal technology, employment law, family law and professional responsibility.

She is the 2010 recipient of the Hamilton Award in recognition of academic excellence and integrity.



# SESSION IV

3:30 PM - 4:45 PM

## REAL ESTATE

### *Guarantees and Non-Recourse Language in Commercial Loans*

To combat deflation of commercial real estate values and protect interests when the borrower defaults, commercial real estate lenders are pursuing high net-worth guarantors for repayment of their non-recourse loans. Counsel to borrowers and lenders must anticipate the serious pitfalls in using carve-outs in so-called non-recourse loans and must understand the operative provisions of the “springing recourse” and bad-boy guaranties. Uncertainty on non-recourse carve-out guaranties remains an issue. Mr. Passerin will discuss guaranty enforceability, the scope of liability, the maximum amount recoverable from the guarantor, legal developments in the use and enforcement of commercial real estate loan guaranties, carve-outs in non-recourse provisions, and other recent case law. He will also discuss strategies for resolving disputes involving these provisions.

**1.25 NFPA CLE Credits Pending**

**1.25 Keystone Alliance CLE Credits Pending**

## Forrest T. Passerin, Esquire

*Cozen O'Connor*

Mr. Passerin joined Cozen O'Connor's Philadelphia office in 2012 as a member of the Real Estate Group. His experience with real estate matters includes joint venture, acquisition and disposition transactions on behalf of public and private real estate investors, representing lenders and borrowers in all aspects of loan transactions, negotiating and restructuring distressed real estate lending and joint venture relationships, and structuring ownership of real estate assets.

Mr. Passerin earned his J.D. and M.B.A. from Duquesne University. During law school, he was an intern with the Honorable Carol Los Mansmann of the U.S. Court of Appeals for the 3rd Circuit. He received his bachelor's degree from Denison University.

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# The Philadelphia Association of Paralegals' Annual EDUCATION CONFERENCE

**Friday, October 23, 2015**

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](mailto:education@philaparalegals.com) by October 2nd.

## DIRECTIONS

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.

# DIRECTIONS

## **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' 2015 Education Conference***

**Friday, October 23, 2015  
The Pennsylvania Bar Institute  
The Wanamaker Building  
100 Penn Square East  
Philadelphia, Pennsylvania 19107**

## **REGISTRATION FORM** **Registration Deadline is October 2, 2015**

**NAME OF REGISTRANT:** \_\_\_\_\_ (Print Clearly)

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

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

Corporate: Corporate Compliance and Ethics	Seminar Room B	_____
Instructor: Robin Holts, Esquire		
Employment Law: What Paralegals Need to Know in Employment Law	East Conference Room	_____
Instructor: Eric Meyer, Esquire		
Litigation: Construction Litigation	Faculty Training Room	_____
Instructor: Larry Bendesky, Esquire		
Litigation: Life Care Plans in the Litigation Case	Seminar Room A	_____
Instructor: Jody Masterson, RN, MSN, CRRN, FIALCP		

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

Animal Law: Become a Participant in Public Policy on Behalf of Animals	Seminar Room B	_____
Instructor: Elissa Katz, Esquire		
Estates & Trusts: Understanding Oil, Gas and Mineral Rights in an Estate	Faculty Training Room	_____
Instructor: Steven Karabin, Founder/CEO		
Intellectual Property: Trademark - Who We Are and What We Do	Seminar Room A	_____
Instructor: Renee Servance, Esquire		
Technology: Data Security and Privacy in Legal Practices	East Conference Room	_____
Instructor: Edward McAndrew, Esquire		

### **SESSION THREE 2:00 p.m. to 3:15 p.m.**

Estates & Trusts: Small and Insolvent Estate Administration	Faculty Training Room	_____
Instructor: Daniel Evans, Esquire		
Ethics: Everyday Ethics for Paralegals	East Conference Room	_____
Instructor: Brian Darreffe, Esquire		
Intellectual Property: Patent – How to Make Changes Under the America Invents Act	Seminar Room A	_____
Instructor: Janice Tippet, Esquire		
Litigation: Legal Writing in a World of Emails	Seminar Room B	_____
Instructor: Glenn Barnes, Esquire/Ivy Kempf, Esquire		

### **SESSION FOUR 3:30 p.m. to 4:45 p.m.**

Bankruptcy: Student Loans - Treatment in Bankruptcy and Administrative Remedies	Seminar Room B	_____
Instructor: Brent Diefenderfer, Esquire		
Health Care Law: Privacy and Cybersecurity - The New Information Frontier	Seminar Room A	_____
Instructor: Julie Haywood, Esquire		
Professional Development: Soft Skills for Paralegals	East Conference Room	_____
Instructor: Carol Sherman, Esquire		
Real Estate: Guarantees and Non-Recourse Language in Commercial Loans	Faculty Training Room	_____
Instructor: Forrest Passerin, Esquire		

### EARLY BIRD DISCOUNT

PAP MEMBER OR MEMBER OF ANY REGIONAL PARALEGAL ASSOCIATION

Full Day Rate (Includes participation in all four sessions and lunch)..... \$145.00

ATTORNEY/NON MEMBER Full Day Rate (Includes participation in all four sessions and lunch) ..... \$180.00

***(TO QUALIFY FOR THE EARLY BIRD DISCOUNT, PAYMENT MUST BE RECEIVED ON OR BEFORE  
FRIDAY, SEPTEMBER 25, 2015.)***

### SEMINAR FEES

PAP MEMBER OR MEMBER OF ANY REGIONAL PARALEGAL ASSOCIATION \$165.00

Full Day Rate (Includes participation in all four sessions and lunch).....

PAP MEMBER OR MEMBER OF ANY REGIONAL PARALEGAL ASSOCIATION \$130.00

Half Day Session (Includes participation in two consecutive sessions with lunch) .....

ATTORNEY/NON MEMBER Full Day Rate (Includes participation in all four sessions and lunch)..... \$200.00

ATTORNEY/NON MEMBER Half Day Session (Includes participation in two sessions and lunch) ..... \$160.00

STUDENT Full Day Rate (Includes participation in all four sessions and lunch)..... \$95.00

STUDENT Half Day Session (Includes participation in two sessions and lunch)..... \$65.00

LUNCH ONLY..... \$50.00

### LUNCH SELECTION

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Gluten-free Chicken

☐  
☐

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