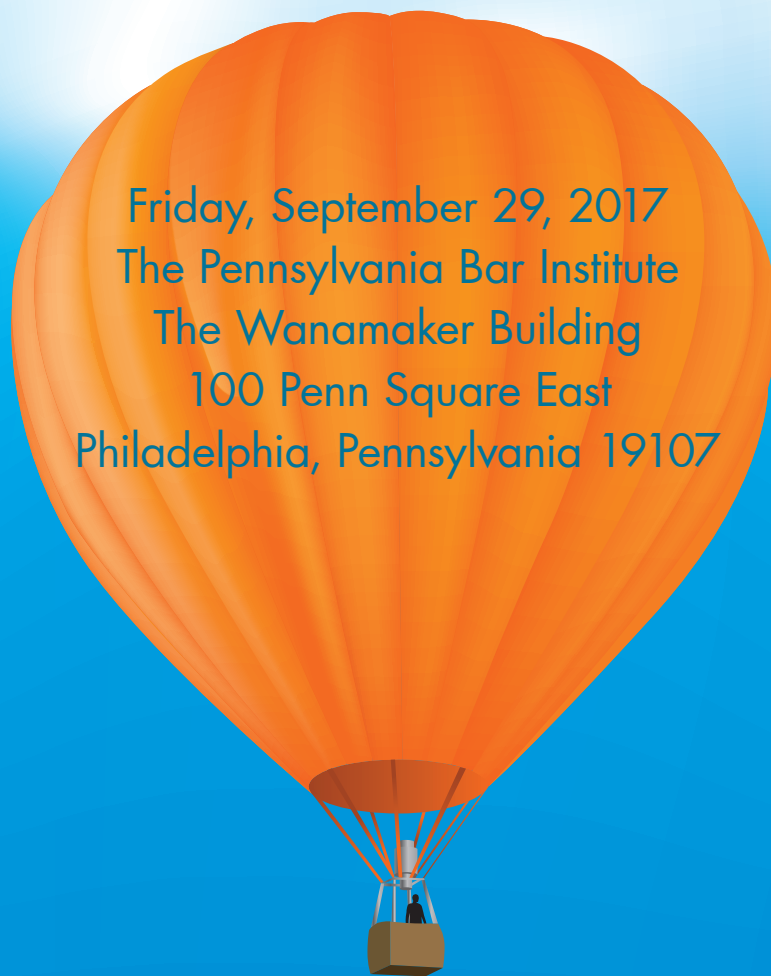


# The Philadelphia Association of Paralegals' **EDUCATION CONFERENCE**

*Paralegals Soar to Great Heights*



Friday, September 29, 2017  
The Pennsylvania Bar Institute  
The Wanamaker Building  
100 Penn Square East  
Philadelphia, Pennsylvania 19107



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# The Philadelphia Association of Paralegals' ANNUAL EDUCATION CONFERENCE

**Friday, September 29, 2017**

The Pennsylvania Bar Institute Conference Center - 10th 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 the TASA Group)*

**Session I: 9:00 am - 10:00 am**

**Morning Break: 10:00 am - 10:30 am**

*(Sponsored by Peirce College)*

**Session II: 10:30 am - 11:30 am**

\* \* \* \*

**Luncheon: 11:30 am - 1:30 pm**

*Keynote Address by*

**Holly Frey, Esquire**

**The Crystal Tea Room**

**9th Floor**

\* \* \* \*

**Session III: 2:00 pm - 3:00 pm**

**Afternoon Break: 3:00 pm - 3:15 pm**

*(Sponsored by The Legal Intelligencer)*

**Exhibitor Raffles: 3:00 pm - 3:15 pm**

**Session IV: 3:15 pm - 4:15 pm**

\* \* \* \*

**Exhibit Area: 8:00 am - 4:15 pm**



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# THE PRESIDENT'S MESSAGE

Welcome paralegal, attorney and student colleagues! The Philadelphia Association of Paralegals ("PAP") is committed to promoting and expanding the paralegal profession in our community; we are honored to host our 2017 Education Conference at the Pennsylvania Bar Institute in Philadelphia. For 31 years, our conference has promoted the education and professionalism of paralegals. This year continues our rich tradition with course offerings such as Cyber Exposures and Insurance, the Epidemic of Distracted Driving, Expulsion/Special Education Law and Social Media and the Law to name a few. You will also be able to network with local and regional paralegals as well as learn which vendors can help you get your job done quicker and more efficiently!

This year, our theme is Paralegals Soar to Great Heights. William Faulkner wrote, "Always dream and shoot higher than you know you can do. Do not bother just to be better than your contemporaries or predecessors. Try to be better than yourself." In his quote, Faulkner expresses the life of his dreams, and that it is necessary to concentrate on what you want and keep working toward it.

How can you stay motivated and continue to work up to your potential? Here are seven strategies to help you soar: (1) make every moment count, (2) strive for excellence in everything you do, (3) begin with the end in mind, (4) be positive, (5) be optimistic, (6) set smaller objectives toward accomplishing larger goals, and (7) celebrate your successes. When you use these techniques, you will find yourself on top of the world!

As paralegals we face many challenges. Our days include urgent requests, daunting deadlines, and the necessity to continue to learn and evolve in our profession. We may not know what challenges are waiting for us tomorrow, but these challenges allow us the opportunity to show what we are made of. The next time you find your day morphing into utter chaos, remember to take a deep breath, meet the challenge with courage, and give it the best that you have.

I would like to thank Lyndora Patterson Tiller, Chair of our Education Committee and the members of our Education Committee, especially Theresa Alexander, Christine Flynn, Vivian Luckiewicz, Tamika Way, Andrea Yannuzzi and Mary Lou O'Connell; there was no greater source of inspiration and motivation for me than to walk into an afternoon Education Conference meeting and be greeted by smiles of friendly and supportive committee members like you. Thanks for being my parachute while I'm so busy soaring!

Many thanks also to our sponsors, vendors and this year's keynote speaker, Holly Frey, Esquire, Staff Attorney for the United States Court of Appeals for the Third Circuit, a former paralegal who soared to great heights.



**Harry A. Reichner, M.A.**  
2017 President

# ASSOCIATION ACKNOWLEDGEMENTS

We would like to thank the Education Committee members, Theresa Alexander, Karen Daemer, Christine Flynn, Vivian Luckiewicz, Mary Lou O'Connell, Victor Panieczko\*, Kathy Merlino, Harry Reichner, Tamika Way, and Andrea Yannuzzi for their assistance with the organization of The Philadelphia Association of Paralegals' 2017 Education Conference. Special thanks to volunteers Danielle Finizio, Trena Luke, Eleanora Martin, Gregory Moore, Christi NeSmith and Laura Rodriguez.

We also want to acknowledge our Keynote Speaker, Holly Frey, Esquire and all of the speakers for taking the time out of their busy schedules and volunteering their time and effort in making our Education Conference a huge 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:

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We would like to extend a special thank you to law firms of Cozen O'Connor, Haggerty, Goldberg, Schleifer & Kupersmith, and Independence Blue Cross for all of their extra support.

***Lyndora***

**Lyndora Patterson Tiller**  
Education Committee Chairperson

\*Deceased

# KEYNOTE SPEAKER



## **Holly C. Frey, Esquire**

Holly Frey is currently a staff attorney for the United States Court of Appeals for the Third Circuit. As a staff attorney, she conducts research and drafts memoranda, per curiam opinions, and orders for the Court in the areas of habeas corpus, mandamus, immigration, civil rights and constitutional law, appellate jurisdiction, and federal civil and criminal procedure. Holly is also a tutor for the re-entry program of the United States District Court for the Eastern District of Pennsylvania, assisting participants with completing resumes, entrance applications, and obtaining their GED and/or high school diplomas. Prior to her employment with the Third Circuit, Holly served as a law clerk for Justice Lee A. Solomon of the New Jersey Supreme Court.

Holly was an honors graduate of the Bucks County Community College Paralegal Studies Program, where she was a member of the Phi Theta Kappa Honor Society, and consistently maintained a presence on the President's List. Upon earning a full scholarship from Peirce College, she went on to complete her Bachelors Degree

in Paralegal Studies, graduating summa cum laude as the student commencement speaker and recipient of the Raymond L. Palzer Class of '52 Academic Leadership Award.

In 2015, Holly graduated from Widener University School of Law as valedictorian and Editor-in-Chief of the Widener Law Review. At Widener, Holly was awarded the prestigious Dean's Award, along with Law Review awards for Outstanding Staff Member and Most Outstanding Paper of Publishable Quality. Her Note, "The Borgata Babes Case: The Weighty Matter of Appearance Standards," was published in the spring of 2015.

While obtaining her undergraduate and law degrees, Holly also worked full-time as a paralegal/law clerk of first Hill Wallack, LLP, and then Hardwick Collier, LLC, with a focus on labor and employment law.

Holly is a frequent guest speaker at Peirce College, providing students with insight into law school, the paralegal profession, and her own educational journey.



# 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 2018 PAP membership
- Every student attendee will be entered in a drawing to win a free 2018 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 (2)

## **PRIZES GALORE:**

- Every attendee will be eligible for raffle prizes
  - Autographed copy of Happily Ever NOT by Sharon A. DeNofa, RP®
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  - Lucky Strike – gift certificate for bowling party
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  - Philadelphia Soul (couple pairs of tickets)
  - Scoop DeVille – gift card
  - Steven Singer - \$100.00 gift card



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# MENU SELECTIONS

Friday, September 29, 2017  
Grand Ballroom 12:00 pm - 2:00 pm

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

## MENU

### CLASSIC GARDEN SALAD

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

### ENTRÉE

#### **Chicken Love Park**

*Sautéed Spinach, Sun-Dried Tomatoes, Boursin Cheese  
With Classic Garlic Mashed Potatoes and Hericot Verts*

or

#### **Broiled Stuffed Tilapia\***

*Creamy Crab Imperial, Chardonnay, Citrus Dill Butter  
With Classic Garlic Mashed Potatoes and Hericot Verts*

or

#### **Vegetable Strudel**

or

#### **Roasted Portobello Mushroom & Asparagus (Vegan)**

### DESSERT

#### **Mini Pastry Trio Plate**

*Fruit tart, Cannolis, Cream Puff, Eclair, Hazelnut Moose Tart, Mini Carrot Cake*

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

\*This dish is also offered in gluten-free version. Vegan meals are also available.  
Special requests must be received by September 8, 2017.

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# *In Memoriam*



It is with a heavy heart that The Philadelphia Association of Paralegals announced the passing of our 1st Vice President, Victor Panieczko, CRP™, Pa.C.P. on March 9, 2017. Victor was a long-standing and dedicated member of PAP, serving in multiple positions throughout the years. He donated countless hours to serve our members and advance the paralegal profession. He was a kind, gentle and generous man who inspired fellow paralegals and students alike. He will be greatly missed.

PAP will be working with Steven S. Poulathas, Esquire of the Flaster Greenberg PC to collect funds to help Victor's son, Michael Panieczko, pay for his future education expenses. Checks can be forwarded to Steven's attention at the address below and should be made payable to "Iwona Panieczko fbo Michael Panieczko."

Steven S. Poulathas  
Flaster Greenberg PC  
Commerce Center, 1810 Chapel Ave. West  
Cherry Hill, NJ 08002  
Telephone: 856.382.2255  
E-mail: [steven.poulathas@flastergreenberg.com](mailto:steven.poulathas@flastergreenberg.com)



# SESSION I

9:00 am - 10:00 am

## EMPLOYMENT LAW

### *Litigation Hold/Preservation Notices*

What is a party's duty to preserve evidence? When does the duty to preserve evidence begin? How does a party comply with the legal requirements related to sending a preservation letter/legal hold notice? What practical steps should a party take to protect itself from claims that it did not properly preserve evidence? What are the potential dangers of not preserving evidence?

All of the above questions and more will be answered during the presentation. Specific attention will be paid to cases within the Third Circuit and other seminal cases from outside the Third Circuit.

**1.00 NFPA CLE Credit Pending**

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## Erin Fitzgerald Bender

*Independence Blue Cross, LLC*

Ms. Bender currently is a member of the in-house legal department at Independence Blue Cross. As Senior Counsel, she focuses her practice on employment matters.

Prior to joining Independence Blue Cross, she was an associate within Fox Rothschild's Labor and Employment Department. As an associate, Ms. Bender handled a wide variety of employment discrimination matters, including discrimination suits and regulatory matters related to Title VII, ADEA, GINA, ADA, FMLA, PHRA and NJLAD. She advised clients on various employment issues including but not limited to payroll issues, discipline, termination, leaves of absence, providing accommodations, employment applications, and severance agreements.

Prior to joining the Fox Rothschild, LLP, Ms. Bender was a summer associate for Fox, and interned for the Honorable Freda L. Wolfson, U.S. District Court for the District of NJ; and for the U.S. Department of Justice, Criminal Division, in Washington DC.

Ms. Bender graduated from Rutgers School of Law – Camden. Prior to law school she graduated from Dartmouth College.

# SESSION I

9:00 am - 10:00 am

## INTELLECTUAL PROPERTY

### *Recent Supreme Court Decisions that Have Changed the IP Landscape*

This presentation will review decisions by the Supreme Court of the United States (SCOTUS) in the 2016-2017 session relating to patents, trademarks and copyrights. The SCOTUS has decided an increasing number of intellectual property (IP) cases in recent years, in recognition of the importance of IP to the U.S. Economy. The speaker will explain the issues and possible impacts on litigation and commerce. These cases involve awards for design patent infringement, the geographic limits of U.S. patent law on products sold outside the U.S., the impact of unreasonable delay in commencing patent litigation, when fashion apparel is protected by copyright, venue in patent cases, the rights of parties who buy products abroad from the owner of a U.S. patent covering the product, the right to make copycat versions of biosimilar drugs, and the right to register offensive trademarks.

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## Steven E. Koffs, Esquire

*Duane Morris LLP*

Steven E. Koffs concentrates his practice on intellectual property, with emphasis on patent prosecution, patent office post grant proceedings (including inter-partes review and reexamination), opinions (patent invalidity and non-infringement, right to use) trademarks, copyright and trade secret protection.

Mr. Koffs has authored hundreds of patents and patent applications in various technical areas including but not limited to semiconductor fabrication, medical devices, solar cells, camera controls, medical imaging equipment, software, communications, electronic commerce, financial services, construction materials and products, industrial fabrics, memory devices, MPEG systems, pattern recognition, data compression, and opto-electronics.

Mr. Koffs has performed detailed analysis of patent validity, infringement and enforceability issues for litigations, and has counseled clients and drafted pleadings and opinions in both litigation and pre-litigation matters. In licensing and cross-licensing negotiations, he has performed analysis of claims and prior art, claim charting, and development of positions, and represented the client in assertion meetings with opposing counsel.

Mr. Koffs is an adjunct professor at Villanova School of Law, where he teaches patent prosecution. Mr. Koffs is a President of the Benjamin Franklin Inn of the American Inns of Court. He is past chair of the Intellectual Property Law Section of the Pennsylvania Bar Association. He is past chair of a Hearing Committee of the Disciplinary Board of the Supreme Court of Pennsylvania. He is a member of the Institute of Electrical and Electronics Engineers.

Mr. Koffs is admitted to practice in Pennsylvania and before the U.S. Patent and Trademark Office. He is a 1987 graduate of Rutgers University School of Law, a graduate of Drexel University, where he received a master's degree in mechanical engineering, and a graduate of the University of Pennsylvania, where he received dual Bachelor of Science degrees in mechanical engineering and management.

# SESSION I

9:00 am - 10:00 am

## REAL ESTATE

### *Current Trends in Real Estate*

This presentation will discuss current real estate trends in the Tri-State Region. Shifts in work style are driving suburban office parks to refashion themselves as all-day environments, a shift designed to give the suburbs where most Philadelphians — including most millennials — still live and work the kinds of attributes that have spurred central-city revivals in large cities all across the country, including Philadelphia. Philadelphia ranks much higher as an investment opportunity in the coming year. As a market for home building, for instance, the area ranked eighth nationally. And among markets in the Northeast, the ULI/PwC forecast rated the Philadelphia market the fourth strongest, after Boston, Manhattan and Brooklyn, with conditions continuing to improve. This presentation overviews the current real estate environment how the law and legal industry are keeping up with these trends.

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## Christopher J. Preate, Esquire

*Cozen O'Connor*

Christopher J. Preate concentrates his practice on local, regional and national transactions, including joint venture arrangements; project finance transactions; office, industrial and retail leases; transactions involving the development of office, retail and other commercial uses; financing and work-out transactions; and municipal land use matters. His clients include investors and owners in restaurant, multi-family properties, office buildings, educational assets, commercial retail sites and retail shopping centers.

Mr. Preate received his bachelor of science degree in accounting from the University of Scranton in 1993, and earned his law degree, cum laude, from Widener University School of Law in 1996. Christopher is admitted to practice in Pennsylvania, New York, New Jersey, and Florida, and is a member of the American, Pennsylvania, New Jersey, Florida, New York, Philadelphia and Lackawanna County Bar Associations.

Mr. Preate was named a Pennsylvania Rising Star by Law and Politics.

# SESSION I

9:00 am - 10:00 am

## TECHNOLOGY

### *Social Media and the Law*

We now live in a world of Snapchat, Reddit, Kik, Instagram and Facebook Live. In this new era, courts are struggling to apply existing laws to deal with this 21st century way of communication. This lecture will examine recent court decisions relating to social media and the First, Fourth and Fifth Amendments, as well as rules of evidence and civil procedure.

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## Liz Canapary, Esquire

*Community College of Philadelphia*

Liz Canapary is a professor at Community College of Philadelphia. She teaches courses related to technology and the law. In 2012, she was awarded a Perkins Grant to evaluate technology used in the Paralegal Studies Program and in 2015 she won a League of Innovation Award for her help in establishing expungement clinics at the school. Liz is currently working to facilitate a series of deliberative democracy discussions at the college relating to incarceration and returning citizens. Prior to her teaching career, Liz worked in complex litigation at White and Williams LLP. She received her Juris Doctor from Cornell Law School and Bachelor of Arts from University of Rochester.





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# SESSION II

10:30 am - 11:30 am

## CORPORATE

### *Securities Industry Investigations*

This program will provide a general overview of the SEC investigations and current developments in SEC enforcement actions. We will cover how investigations begin, strategies during investigations, whistleblowers and resolution of SEC enforcement proceedings.

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## Jay A. Dubow, Esquire

*Pepper Hamilton LLP*

Mr. Dubow is a Partner in the White Collar Litigation and Investigations Practice Group and is co-chair of the Securities and Financial Services Enforcement Group. Mr. Dubow focuses his practice on complex business litigation, with a special emphasis on defending against shareholder derivative and securities class action litigation and representing clients involved in investigations by the U.S. Securities and Exchange Commission, the Pennsylvania Department of Banking and Securities and various self-regulatory organizations, including the Financial Industry Regulatory Authority, Inc.

Mr. Dubow first joined Pepper in 2007 from another Philadelphia law firm, where he was a partner in the litigation and corporate departments and a member of the executive committee. In 2008, he joined a client, Advanta Corp., as senior vice president, general counsel and chief administrative officer. He returned to Pepper in 2011. Mr. Dubow began his career as a branch chief in the Division of Enforcement of the U.S. Securities and Exchange Commission in Washington, D.C.

Mr. Dubow is active in local and national bar associations. Mr. Dubow is a leader in the American Bar Association's Business Law Section and currently serves as chair of the Securities Litigation Subcommittee of the Business and Corporate Litigation Committee.



# SESSION II

10:30 am - 11:30 am

## LEGAL WRITING

*Advanced Issues in Civil Procedure Dispositive Motions, From a Judge's Perspective*

These are motions wherein the moving party is seeking to preclude the non-moving party from proceeding to verdict from the finder of fact; in effect, the moving party seeks to close the court house door. The balancing factor is that citizens should not have to undergo the trauma, shock and even the expense of trial unless there is a valid cause of action against them and it would be just plain wrong to make that party present a defense when there isn't a real case to defend against. The rules recognize that on occasion, a party will file a lawsuit against another party even though the evidence against the other party may not warrant an adverse finding by the jury, or a judge sitting as both judge and jury. Judges are faced with the challenge of resolving these motions, that is, to assess the proof in order to determine whether there is a need for a trial.

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## Honorable John Milton Younge

*Judge, Court of Common Pleas of Philadelphia*

Judge John Milton Younge, a native Philadelphian, was elected to a ten year term on the Court of Common Pleas in 1995 and was re-elected in 2005 & 2015. Raised in the southwest section of the city, he is a product of the Philadelphia Public School system and a member of the 232nd graduating class of Central High School in 1973. Judge Younge earned a degree in Business Administration from Boston University in 1977 and in 1981, he received his Juris Doctor Degree from the prestigious Howard University School of Law. His previous employment was Deputy Executive Director and General Counsel, Redevelopment Authority of Philadelphia (1985 to 1995), Attorney and Counselor at Law (1982 to 1985), and he also had his own community based, private law practice. He continues to teach legal education for judges and lawyers and is an adjunct professor at the Delaware County Community College.

His Civic/Church involvements are Chairman, Board of Directors of the West Philadelphia Community Mental Health Consortium; Chairman, Board of Directors of New Life Credit Union; Board Member of the Central High School Alumni; Member of the Omega Psi Phi Fraternity, Mu Omega Chapter; Co-Chairman, Board of Finance of the Deacon's Board of Sharon Baptist Church.

His professional involvements are Member, PA Conference of State Trial Judges; Member, Clifford Scott Green Chapter, NBA Judicial Council; Member, Pennsylvania Bar Association, House of Delegates; Member, Philadelphia Bar Association. He received his Masters of Judicial Studies degree from the University of Nevada, Reno in August, 2011.

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



# SESSION II

10:30 am - 11:30 am

## LITIGATION

### *Epidemic of Distracted Driving*

According to the National Highway Traffic Safety Administration (NHTSA), at any given daylight moment there are about 14 million passenger vehicles using the United States Surface Transportation Network (2015 data). Of these 14 million vehicles, NHTSA estimates that about 6% of these vehicles feature an operator who is using or manipulating their cell phone in a non-hands free mode. That means that, right now, as you read this, there are close to 1 million vehicles being operated by a distracted motorist; and even more troubling is that of these distracted vehicles, nearly 500 million feature an operator who is between the ages of 16 and 24. Distraction is commonly classified in three ways: visual (eyes off the road), manual (hands off the wheel), and cognitive (mind off the task of driving). All three of these, by themselves, come with inherent risk to both the driver and fellow users to the system - however, when more than one form of distraction is present (as is the case with cell phone use), the associated dangers grow and the environment becomes even more dangerous. When collisions occur involving distracted drivers, it is important to not only determine the source of the distraction, but also the manner in which the distraction did, or did not, impact the happenings of a collision event. While investigations into cell phone records may reveal that an operator was using their cell phone prior to or during a collision, a situationally appropriate reconstruction is still required to quantify any potential impact the distraction may have had.

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## Justin P. Schorr, PH.D.

*DJS Associates, Inc.*

Justin P. Schorr, Ph.D. received his Doctorate and Masters from The George Washington University (GWU) and attended Northwestern University for his undergraduate degree. Presently, Justin is a post-doctoral researcher and adjunct professor at GWU teaching Sustainable Urban Dynamics and Intelligent Transportation Systems - as well as the programming portion of Engineering Computations. With DJS Associates, Justin provides engineering analysis to law firms, insurance companies and government entities for collision reconstruction, highway safety, traffic and transportation matters.

# SESSION II

10:30 am - 11:30 am

## TECHNOLOGY

### *Cyber Exposures and Insurance*

This program will explain what Cyber, Privacy and Security Exposures are and what types of insurance are available in today's marketplace. A PowerPoint presentation will include the following topics. It explains Cyber, Privacy and Security Liability and provides an overview and history of types of claims experienced in healthcare, finance and business. Actual claim scenarios are described including the scope and cost of each breach. Types of Personal Identifiable Information are discussed. The current laws applicable to this subject are identified providing the current legal landscape. Insurance is described explaining the gaps in coverage under traditional insurance and describing the current cyber insurance available in the marketplace today. Risk management is addressed and how to implement proactive measures to minimize the risk of a data breach. Questions are encouraged throughout the presentation.

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## Deborah Tesei and Paul Lichtman

*Independent Insurance Advisors Rampart, LLC*

Paul Lichtman is the President of Independent Insurance Advisors Rampart, LLC. Mr. Lichtman has been in the insurance industry since 1962. As owner and president of prominent insurance brokerage and consulting firms since 1964, he has a wealth of experience as both a businessman and insurance broker and consultant.

Deborah Tesei, CPCU has been in the insurance industry since 1978. Her experience includes managing large commercial accounts as a broker and consultant. She also held prominent positions in risk management for Warner Communication, Inc. in New York and Chesebrough-Ponds, Inc. in Greenwich, Connecticut. Over the past 10 years, Ms. Tesei has managed cyber programs for many clients including an Internet Bank and a national retail Internet marketing company.

The PowerPoint presentation was developed by Chas Bellingrath, ARC Excess & Surplus National Practice Leader: Cyber/Tech Chas joined ARC Excess & Surplus in July 2011 as the National Practice Leader for Privacy, Network Security, and Technology E&O. In his role Chas is responsible for advising agents and clients on issues related to technology, privacy and cyber related risks as well as negotiating with carriers on policy terms and conditions.

In addition, Chas is responsible for product development and production throughout the United States.

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# SESSION III

2:00 pm - 3:00 pm

## ESTATES AND TRUSTS

### *End of Life Issues*

Program will discuss end of life issues under Pennsylvania Law and the U.S. Constitution, both in the context of estate planning and in the context of implementation and/or enforcement. Particular cases of importance in Pennsylvania and around the country will be covered as they relate to the historical development of the law in this area. Also covered will be the preparation and use of advanced medical directives, living wills, medical powers of attorney and statements of "health care representative" under Pennsylvania law.

**1.00 NFPA CLE Credit Pending**

**1.00 Keystone Alliance CLE Credit Pending**

## Stephen A. Feldman, Esquire

*Feldman & Feldman*

Recognized both locally and nationally as a leading authority on planning and health care for the elderly, Mr. Feldman practices law in the Philadelphia area firm of Feldman & Feldman. He served as an Adjunct Professor of Law at Temple University, Beasley School of Law from 2008 through 2014. He has been appointed as a Special Assistant Attorney General for the state of North Dakota to represent its Department of Human Services in the appeal of Geston v. Anderson, reported at 729 F.3d 1077 (8th Cir. 2013) and he is the former Executive Director of the Senior Citizens Judicare Project (now the SeniorLaw Center), a program established by the Philadelphia Bar Association.

He has served on the Advisory Panel for the National Institute on Aging's Alzheimer's Disease Education and Referral Center (ADEAR) and on the Board of Directors of SeniorLaw Center where he served as Chair and Secretary. Mr. Feldman currently serves on the Board of Directors of the Alzheimer's Association of Delaware Valley (where he formerly served as Vice President) and the Board of Directors of Federation Housing, Inc. of Philadelphia. He previously served as President of the Board of Directors of the Alzheimer's Association of Southeast Pennsylvania, and as Treasurer of the Board of Directors of Community Legal Services. He also formerly served on the Board of Directors of the Center for Advocacy for the Rights and Interests of the Elderly (CARIE) and the Long Term Care Advisory Board of the Philadelphia Corporation for Aging (PCA), the Philadelphia Area Agency on Aging. Mr. Feldman was the first chair of the Philadelphia Task Force on Elder Abuse and a drafter of the Pennsylvania Protection of the Elderly Act.



# SESSION III

2:00 pm - 3:00 pm

## HEALTH CARE LAW

### *Cybersecurity in the Health Industry*

This presentation will review why the healthcare sector is a preferred target for cyber-attacks, what can be done to decrease vulnerabilities and why it is imperative for healthcare providers to do so. The lax cybersecurity of many healthcare providers, combined with the opportunity for cybercriminals to make it a lucrative source of revenue, criminal attacks in the healthcare sector are up 125% since 2010 and the likelihood to occur in this particular industry is greater than any other sector in the economy. Cyber criminals raided the healthcare sector more than any other sector in 2015, with more than 100 million healthcare records being compromised. This presentation will discuss current cybersecurity methods and ways the healthcare sector can institute best practices to safeguard patients records.

**1.00 NFPA CLE Credit Pending**

**1.00 Keystone Alliance CLE Credit Pending**

## Robert A. Chu, Esquire

*Cozen O'Connor*

Robert A. Chu is a member in the Health Law Practice Group, focusing on health care litigation and regulatory matters. He joined the firm's Philadelphia office in September 2009, following his participation in the firm's 2008 Summer Associate Program.

Mr. Chu primarily represents health care providers in Medicare, Medicaid, and third-party payor reimbursement disputes. Robert also counsels health care clients on regulatory and compliance issues, such as those related to the Sunshine Provisions of the Patient Protection and Affordable Care Act.

Mr. Chu is a member of the board of directors of the Asian Pacific American Bar Association of Pennsylvania.

At Cornell University, Mr. Chu earned his Bachelor of Science, with honors, in policy analysis and Management, with a concentration in health policy. He earned his Master of Business Administration from Villanova University. Robert received his Master of Public Health, with a concentration in health policy and administration, from Yale University, where he was a managing editor of the Yale Journal of Health Policy, Law, and Ethics. He earned his law degree, cum laude, from Villanova University School of Law. During law school, he was a quarterfinalist in the Theodore Reimel Moot Court Competition, and he successfully secured immigration asylum for clients through Villanova's Clinic for Asylum, Refugee and Emigrant Services. At graduation, he was awarded the Herman J. Obert Award for the highest grade in Business Organizations, the St. Thomas More Society Award for the highest cumulative average for his third year of law school and the ABA-BNA Award for excellence in the study of health law.

# SESSION III

2:00 pm - 3:00 pm

## HEALTH CARE LAW

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**1.00 NFPA CLE Credit Pending**

**1.00 Keystone Alliance CLE Credit Pending**

## Dana Petrillo, Esquire

*Cozen O'Connor*

Ms. Petrillo handles a wide variety of regulatory, transactional, litigation, and corporate matters for hospitals, health systems, physician practices, nursing facilities, and other health care providers. Her experience includes ensuring clients' compliance with federal and multi-state health care laws and regulations, including Medicare, Medicaid, licensure, HIPAA, Stark, Anti-Kickback, and False Claims Act laws and regulations; advising clients on legal issues arising from health care transactions and business arrangements; assisting with health care provider licensure, Medicare and Medicaid provider enrollment, and reimbursement; and providing counseling in connection with litigation, government audits, and investigations.

Ms. Petrillo joined Cozen O'Connor's Philadelphia office in 2014. Before joining the firm, she practiced as a health law attorney in Boston.

Ms. Petrillo earned her Juris Doctor at Boston University School of Law, where she volunteered as a first year law student adviser and was a member of the Women's Law Association. She earned her Bachelor of Arts, cum laude, at Georgetown University, where she double-majored in English and studio art.

# SESSION III

2:00 pm - 3:00 pm

## LITIGATION

### *Civil Rights*

This program will provide a general overview of the Civil Rights Act of 1964, as amended, and Title IX of the Education Amendments Act of 1972. The program will examine what protections these and other statutes afford students against discrimination and harassment in school based on sex, gender identity, race, color and national origin, and the obligation of schools to respond properly to such incidents.

**1.00 NFPA CLE Credit Pending**

**1.00 Keystone Alliance CLE Credit Pending**

### Diane B. Sher, Esquire

*Fineman Krekstein & Harris*

Diane Bernoff Sher is a partner at the Philadelphia law firm of Fineman, Krekstein & Harris with more than 30 years of experience defending commercial, governmental and individual clients in complex civil litigation. She has broad experience in municipal liability and school law, including the defense of civil rights claims, and has represented private and governmental clients in connection with employment and wrongful discharge litigation. Her practice also includes insurance coverage litigation, trucking and dram shop litigation.

Ms. Sher practiced with Fineman, Krekstein & Harris for 24 years and recently returned after serving ten years as Assistant General Counsel for the School District of Philadelphia. As head of the Tort and Civil Rights Unit in the Office of General Counsel for the eighth largest school district in the United States, she defended the School District in hundreds of matters with an emphasis on civil rights claims brought under 42 U.S.C. Section 1983, premises liability and vehicular liability. She was lead counsel in major jury trials, arbitrations and mediations.

Ms. Sher was a member of the team representing the School District in a high-profile investigation by the Civil Rights Division of the United States Department of Justice into allegations of racial harassment of students. Following resolution of the investigation, she ensured that the School District was in compliance with a court-approved settlement agreement.

Ms. Sher argued the pivotal civil rights case of *Morse v Lower Merion School District*, 132 F.3d 902, 3rd Cir. (1997) in the Third Circuit Court of Appeals. She successfully obtained summary judgment resulting in the dismissal of numerous civil rights cases against the school district and individuals.

Ms. Sher is a member of the Defense Research Institute Governmental Liability Section, and her recent article *When Students are Harassed: A Roadmap for Proper Response* was the featured article in the March, 2017 Governmental Liability Newsletter. She was awarded a Certificate by the National Institute of Trial Advocacy. Diane serves as Judge Pro Tem in the Philadelphia Court of Common Pleas, where the court also appointed her guardian ad litem in a catastrophic motor vehicle accident case. She authored course materials and served on the faculty of continuing legal education (CLE) programs, including seminars on Municipal Law and Liability and the defense of trucking accidents offered by the Pennsylvania Bar Institute.

# SESSION III

2:00 pm - 3:00 pm

## PROFESSIONAL DEVELOPMENT

### *Time Management*

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

**1.00 NFPA CLE Credit Pending**

**1.00 Keystone Alliance CLE Credit Pending**

### Ellen Freedman, CLM

*Freedman Consulting Inc.*

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

# SESSION IV

3:15 pm - 4:15 pm

## ESTATES AND TRUSTS

### *Federal Tax Reform Update*

The program will examine the current status of the federal tax reform debate and proposed legislation in Washington, D.C. The program will look at both personal and corporate income tax proposals, as well as the future of the federal transfer tax system (i.e., the estate, gift and Generation Skipping Transfer taxes). The program will also offer suggestions for how to prepare for these changes, and the impact that it will have with respect to both the legal practice and for clients.

**1.00 NFPA CLE Credit Pending**

**1.00 Keystone Alliance CLE Credit Pending**

### William Hussey, Esquire

*White and Williams, LLP*

William Hussey is the Chair of the Tax and Estates Practice Group at White and Williams LLP, where he focuses his practice on matters of federal, state, local and international taxation. Bill regularly counsels clients in structuring their business and investment affairs in a tax-efficient manner, from the selection, formation and operation of business entities to the disposition of those entities. Bill provides guidance on the ongoing tax obligations and opportunities available to clients in all manner of their domestic and international operations. Another focus of Bill's practice is counseling individual clients on all phases of estate and wealth transfer planning. He primarily concentrates his estate planning practice on business succession, wealth transfer and asset protection planning for high net worth individuals, including business owners, executive employees, medical professionals and their families.



# SESSION IV

3:15 pm - 4:15 pm

## ETHICS

### *Social Media Ethics for Paralegals*

It is critical for paralegals to understand how they may and may not use social media in legal practice. Failure to follow the ethical rules can result in supervising attorneys getting in serious trouble. Social media is extremely useful in performing research and can make or break a case. However, it is important to know how to properly obtain evidence and what types of communication are permissible when communicating with clients, witnesses, and even the opposing side.

**1.00 NFPA CLE Credit Pending**

**1.00 Keystone Alliance CLE Credit Pending**

## Jennifer Ellis, Esquire

*Lowenthal & Abrams*

Due to her background in social media, legal education and ethics, Jennifer Ellis brings a unique perspective to Lowenthal & Abrams. Ms. Ellis assists the other attorneys at Lowenthal & Abrams with issues surrounding social media, ethics and the firm's cases. She also represents Pennsylvania attorneys who need legal ethics assistance.

A frequent author and speaker, both in Pennsylvania and nationally, Ms. Ellis lectures and writes on issues including social media, legal ethics, and technology for law firms. She wrote the book, *WordPress in One Hour for Lawyers* and the chapter on social media for the American Bar Association Solo and Small Firm Legal Technology Guide.

Very involved in the legal community, Ms. Ellis is Chair-Elect of the Pennsylvania Bar Association's Solo and Small Firm Practice Section, Secretary of the GLBT Rights Committee and on the Executive Committee of Women in the Profession. In addition, Ms. Ellis is a member of the American Bar Association's Law Practice Division, where she is on Council and a member of the Publications Committee. Previously, she served as Vice-Chair of the Diversity and Inclusion Committee. Jennifer is also a Fellow of both the Pennsylvania Bar and American Bar Foundations.

Ms. Ellis obtained her law degree cum laude from Widener University School of Law in Delaware, and her undergraduate degree from Dickinson College. While at Widener, she served on Law Review and as a board member of the Moot Court Honors Society. She is licensed to practice in Pennsylvania.

# SESSION IV

3:15 pm - 4:15 pm

## LITIGATION

### *Special Education Law*

This program will cover the general provisions of the Individuals with Disabilities Education Act (IDEA). Topics regarding eligibility, delivering and monitoring of special education services will be discussed. This program will also examine and assess what constitutes a Free and Appropriate Public Education (FAPE) will occur, as well as an explanation of the IEP (Individual Education Plan) process.

**1.00 NFPA CLE Credit Pending**

**1.00 Keystone Alliance CLE Credit Pending**

## Sharene Ginyard, Esquire

*Defender Association of Philadelphia, Child Advocate Unit*

Ms. Sharene Ginyard is a former Special Attorney with the School District of Philadelphia. Ms. Ginyard defended the School District against lawsuits filed by parents and guardians for violations of FAPE pursuant to the IDEA. Ms. Ginyard has represented the interest of children, parents and the School District of Philadelphia for over fifteen years. Currently, Ms. Ginyard is an Assistant Defendant with Defender Association of Philadelphia representing children and youth in dependency and education matters.

# SESSION IV

3:15 pm - 4:15 pm

## PROFESSIONAL DEVELOPMENT

### *Stress Management*

Stress is a normal part of life. It's our reaction to the mental and physical demands we face every day. If properly identified and mastered, stress can have a positive impact on your life and motivate you to achieve great things. Think about it...what you feed (focus on) grows. Let's work together to starve our stress and feed our success! This session will help you redefine the stressors in your work and personal environments and then give you some tips, tools and techniques to propel you forward.

**1.00 NFPA CLE Credit Pending**

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### Tausha P. Major, MBA

#### *Custom Computer Specialists*

Ms. Major is known as an out-of-the-box overachiever in the pursuit of excellence. She holds a Paralegal Certificate, Bachelor of Science in Business Communications and an Masters in Business Administration in Management. With 30 years of administrative and management experience in the legal industry, she currently works full time at Custom Computer Specialists as a Professional Developer and Education Trainer. In this role, she develops and facilitates training to teachers, administrators and principals for approximately 220 schools within the School District of Philadelphia. Always wearing multiple hats, she also works part-time for Rowan College at Burlington County as the Paralegal Program Coordinator. She oversees the entire Associate Degree program and supervises the Adjunct Faculty comprised of Lawyers and Judges. As one who never rests on her laurels, Ms. Major is also an Adjunct Professor at Peirce College in Philadelphia, Pa in both the Business and Paralegal Studies Departments. She also serves as Co-Director of Special Events at Bethany Baptist Church, a megachurch in Lindenwold, NJ. With a strong passion to help others achieve success, Ms. Major was Chair of the Professional Development Committee (2009-2012) for the Philadelphia Association of Paralegals and sat on its Board of Directors as 2nd Vice President (2010-2012). She has written several articles published by The Philadelphia Forum and The Legal Intelligencer and is also a regular guest speaker, mentor and motivator at organizations across the Delaware Valley. In 2005, she obtained a copyright for her powerful workshop, Tips for Strategic Career Planning©. She is a native of Philadelphia, Pa and currently resides in Pine Hill, NJ.

# *In Memoriam*



On December 7, 2016, the Philadelphia-area legal community received the devastating news that our colleague and friend, Professor Edwin Miller of Peirce College, passed away suddenly on December 6, 2016.

For the Philadelphia-area legal community, Peirce College and Professor Ed Miller, J.D., went hand-in-hand. As the head of the College's Legal Studies programs for 16 years before his passing, his dedication to the industry and to helping his students reach their fullest potential was legendary.



Everyone who had the privilege of sitting in one of Ed Miller's classes knew that he was a good teacher. He knew his stuff, prepared well, and explained clearly. What made him great was that he truly cared about his students. He gave them his time and lots of it. He listened to them and let them know he cared about them. He learned their names. He let them know how they were doing with regular feedback. And when they did something good, he praised them - and he meant it; nothing made Ed happier than seeing his students do well.

And now, that spirit will live on in the form of the Professor Edwin B. Miller Memorial Scholarship. Retired Peirce professor Glenn Barnes, J.D.; Dr. Ruth Shaber, founder and president of the Tara Health Foundation; and current Peirce professors Cynthia Gentile, J.D. and Ivy Kempf, J.D. have pledged a 4-to-1 match, up to \$160,000, for every dollar given to the scholarship through December 31, 2017.

Miller, formerly of Haverford, Pennsylvania, was a practicing attorney before he transitioned to education, where he believed he could have a more substantial impact on the industry he loved. As an educator, he maintained strong connections with the Philadelphia legal community to ensure the program was always teaching the skills needed most by employers. Under his leadership, Peirce-trained paralegals became some of the most sought after job applicants in the region. Additionally, the Paralegal Studies bachelor's degree program became the Philadelphia region's first and only to be approved by the American Bar Association.

Peirce will award the scholarship annually to students majoring in Paralegal Studies, Legal Studies in Business or Criminal Justice Studies, who demonstrate a financial need and who embody the virtues of commitment, scholarship and compassion that were emblematic of Miller's work.

For more information, visit [www.peirce.edu/edwinmillerscholarship](http://www.peirce.edu/edwinmillerscholarship).

# The Philadelphia Association of Paralegals' Annual EDUCATION CONFERENCE

**Friday, September 29, 2017**

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 September 2nd.

## 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.



# 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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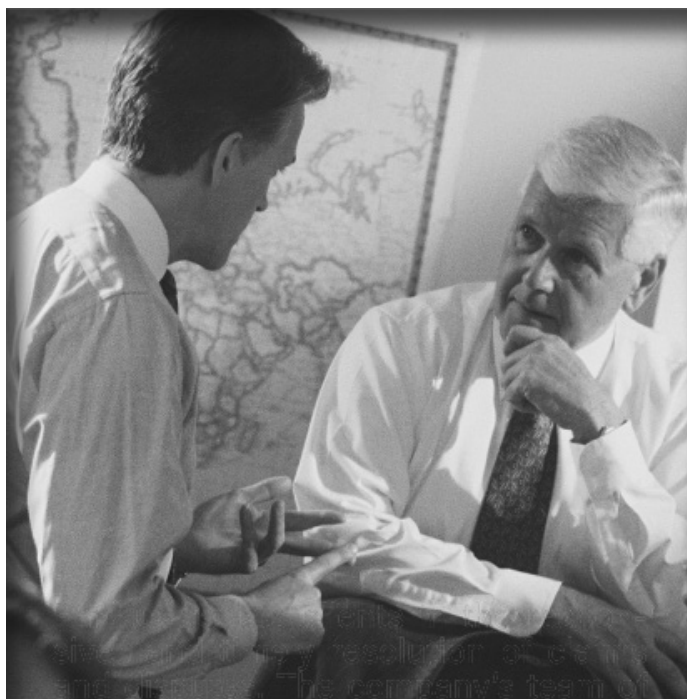
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# The Philadelphia Association of Paralegals' 2017 Education Conference

Friday, September 29, 2017  
The Pennsylvania Bar Institute  
The Wanamaker Building  
100 Penn Square East  
Philadelphia, Pennsylvania 19107

## REGISTRATION FORM

Registration Deadline is September 8, 2017

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

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

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

Employment Law: Litigation Hold/Preservation Notices	Seminar Room A	_____
Instructor: Erin Bender, Esquire		
Intellectual Property: Recent Supreme Court Decisions that have changed the IP Landscape	Seminar Room B	_____
Instructor: Steven Koffs, Esquire		
Real Estate: Current Trends in Real Estate	Faculty Training Room	_____
Instructor: Christopher Preate, Esquire		
Technology: Social Media and the Law	West Conference Room	_____
Instructor: Liz Canapary, Esquire		

### SESSION TWO 10:30 a.m. to 11:30 a.m.

Corporate: Securities Industry Investigations	Faculty Training Room	_____
Instructor: Jay Dubow, Esquire		
Legal Writing: Advanced Issues in Civil Procedure Dispositive Motions	Seminar Room A	_____
Instructor: Judge John Milton Younge		
Litigation: Epidemic of Distracted Driving	West Conference Room	_____
Instructor: Justin Schorr, Ph.D.		
Technology: Cyber Exposures and Insurance	Seminar Room B	_____
Instructor: Paul Lichtman/Deborah Tesei		

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

Estates and Trusts: End of Life Issues	Seminar Room A	_____
Instructor: Stephen Feldman, Esquire		
Health Care Law: Cybersecurity in the Healthcare Industry	Faculty Training Room	_____
Instructor: Robert Chu, Esquire/Dana Petrillo, Esquire		
Litigation: Civil Rights	West Conference Room	_____
Instructor: Diane Sher, Esquire		
Professional Development: Time Management	Seminar Room B	_____
Instructor: Ellen Freedman, CLM		

### SESSION FOUR 3:15 p.m. to 4:15 p.m.

Estates and Trusts: Federal Tax Reform Update	Seminar Room B	_____
Instructor: William Hussey, Esquire		
Ethics: Social Media Ethics for Paralegals	West Conference Room	_____
Instructor: Jennifer Ellis, Esquire		
Litigation: Special Education Law	Faculty Training Room	_____
Instructor: Sharene Ginyard, Esquire		
Professional Development: Stress Management	Seminar Room A	_____
Instructor: Tausha Major, M.B.A.		

**EARLY BIRD DISCOUNT**PAP MEMBER OR MEMBER OF ANY REGIONAL PARALEGAL ASSOCIATION

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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

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