Registration Brochure

Proudly Hosted by the Paralegal Association of Rochester, Inc.

2019 NFPA Annual Convention and Policy Meeting
Rochester, New York | October 10 - 13, 2019

NATIONAL FEDERATION of PARALEGAL ASSOCIATIONS Inc.®

NFPA-The Leader of the Paralegal Profession™

National Federation of Paralegal Associations, Inc.

REGISTER ONLINE TODAY | EARLY REGISTRATION DEADLINE IS AUGUST 9, 2019 | WWW.PARALEGALS.ORG

BENEFITS OF ATTENDING

Attending the Annual Convention will give you the knowledge, skills, connections, and enthusiasm to further your career as a paralegal.

Continuing Legal Education

The educational sessions are designed to enhance your knowledge of specific areas in ways that can elevate your paralegal career.

Networking Opportunities

Convention provides a great opportunity to expand your network and make valuable connections.

Industry Connections

Get to know exhibitors and sponsors to build your list of resources. The next time your employer needs a vendor, you'll know where to turn.

Inspiration

Many paralegals find that they have a significantly renewed passion for the profession and an increased level of confidence in building the paralegal profession after attending an NFPA convention.

Registration discounts available for an education program or employer with multiple attendees.

- 3 - 4 students/employees 10% discount
- 5 - 9 students/employees 15% discount
- 10 -14 students/employees 25% discount
- 15 students/employees or more 30% discount

Please contact the NFPA office at info@paralegals.org or 317-454-8312 with questions or to register.

Schedule at a Glance:

(Tentative - subject to change)

WEDNESDAY, OCTOBER 9

6:00 p.m. - 9:00 p.m.	PAR Welcome Reception at Genesee Brew House

THURSDAY, OCTOBER 10

7:30 a.m. – 7:00 p.m.	Exhibit Hall Open
7:30 a.m. – 5:00 p.m.	Registration
8:00 a.m. – 12:00 p.m.	PACE Testing
8:30 a.m. – 11:30 a.m.	Concurrent Education Sessions
11:30 a.m. – 1:10 p.m.	Keynote Luncheon sponsored by Bond Schoeneck & King, PLLC
1:15 p.m. – 4:00 p.m.	Concurrent Education Sessions
4:15 p.m. – 5:15 p.m.	Student Workshop
4:15 p.m. – 5:15 p.m.	Workshops
5:30 p.m. – 6:00 p.m.	Mentor/Mentee Meet Up
5:30 p.m. – 7:00 p.m.	Exhibitors' Reception
7:00 p.m. – 10:00 p.m.	Board of Directors' Meeting

FRIDAY, OCTOBER 11

7:30 a.m. – 5:00 p.m.	Registration
7:30 a.m. – 12:00 p.m.	Exhibit Hall Open
7:30 a.m. – 8:30 a.m.	In-House Paralegal Breakfast sponsored by CT Corporation
8:30 a.m. - 11:45 a.m.	NFPA Region Meetings
12:00 p.m. – 1:00 p.m.	Coordinator Appreciation/Networking Luncheon sponsored by VeriFyle Inc.
1:15 p.m. – 3:45 p.m.	NFPA Region Meetings
4:00 p.m. – 5:00 p.m.	NFPA Treasurer's Meeting (Members Only)
5:45 p.m.	Begin boarding bus (Bus to run every 10 minutes beginning at 5:45 p.m.)
6:00 p.m. – 10:00 p.m.	Social Event at George Eastman Museum

SATURDAY, OCTOBER 12

8:00 a.m. – 9:00 a.m.	Registration
9:00 a.m. – 5:00 p.m.	Policy Meeting
12:00 p.m. – 1:30 p.m.	Awards Luncheon
6:00 p.m. – 8:00 p.m.	Region Dinners
8:00 p.m. – 12:00 a.m.	Caucus Meetings (if necessary)

SUNDAY, OCTOBER 13

9:00 a.m. – 12:00 p.m.	Policy Meeting
2:00 p.m. – 10:00 p.m.	Board of Directors' Meeting

MONDAY, OCTOBER 14

8:00 a.m. – 12:00 p.m.	Board of Directors' Retreat (NFPA Board Members Only)

Hotel & Travel:

The NFPA Annual Convention and Policy Meeting will be held at the Hyatt Regency Rochester. Situated along the Genesee River, newly renovated Hyatt Regency Rochester is the tallest, most upscale hotel in the Finger Lakes Area and Upstate New York.

Hyatt Regency Rochester, 125 East Main Street
Rochester, New York 14604

Room rate: $159 (single-quad) plus state and local taxes of 14%

Book your room by September 16, 2019

https://www.hyatt.com/en-US/group-booking/ROCHE/G-NFPA

Self-parking rate: $4 per day

For nights outside the room block of October 8-14, 2019, please call the hotel to check availability and rates.

Phone: 585-546-1234

Keynote Speaker

Deborah L. Hughes

Thursday, October 10

Deborah L. Hughes is President & CEO of the National Susan B. Anthony Museum & House, holding this position since 2007. During her tenure, the Anthony Museum has completed a major phase of restoration to the National Historic Landmark, secured its Absolute Charter as a Museum, and dramatically grown attendance while staying true to its mission and vision. Ms. Hughes has also spearheaded innovative programming and events. Her keynote presentation will be "Susan B. Anthony: We are Always Progressing." Luncheon sponsored by Bond Schoeneck & King, PLLC.

Welcome, First Time Attendees!

Convention Mentor/Mentee Program

We are matching up First-Timers with Convention pros to help those new to the NFPA Annual Convention make connections, prepare for Convention, and learn tips for navigating the Policy Floor. Mentors and Mentees will be matched in advance of Convention. If you would like to have a Mentor, or would like to be a Mentor, please mark the appropriate box on your registration form. There will be a designated meeting spot at the beginning of the Thursday evening reception for Mentors and Mentees to meet in person.

Policy Floor Primer Webinar

Wednesday, September 18, 8:00 p.m. ET

Arrive in Rochester prepared by attending this pre-Convention webinar! Whether this is your first time attending convention and representing your association on the Policy Floor or your 10th, this webinar will provide you valuable information on parliamentarian rules that govern the Policy Floor, as well as a review of NFPA's Policies and Procedures. The webinar recording will be available for attendees unable to participate in the live webinar. Register at www.paralegals.org.

NFPA Convention Charity: National Susan B. Anthony Museum & House

The National Susan B. Anthony Museum & House in Rochester, New York was the home of the legendary American civil rights leader, and the site of her famous arrest for voting in 1872. This home was the headquarters of the National American Woman Suffrage Association when she was its president. This is also where she died in 1906 at age 86, following her "Failure is Impossible" speech in Baltimore.

The National Susan B. Anthony Museum & House interprets the great reformer's vision and story, preserves and shares her National Historic Landmark home and headquarters, collects and exhibits artifacts related to her life and work, and offers tours and interpretive programs to inspire and challenge individuals to make a positive difference.

Attendees are encouraged to donate $5 or more to the 2019 NFPA Convention Charity, The National Susan B. Anthony Museum & House, in order to wear jeans on Friday, October 11.

National Susan B. Anthony Museum & House

Wednesday Evening Welcome Reception

The Paralegal Association of Rochester, Inc. is hosting a welcome reception at the Genesee Brew House for their members and the 2019 Convention attendees on Wednesday, October 9, 2019 from 6:00 – 9:00 p.m. No cost, but RSVP required. See the registration form to attend. Cash bar available. The Brew House is a 15 minute walk from the convention hotel or you can take a taxi.

The Genesee Brew House is a pub-style restaurant that was part of the original Genesee Brewery campus more than 100 years ago. The Brew House was created to capture and share with its guests its long history of The Genesee Brewery–one of the largest and oldest continually operating breweries in America. It is a special place that tells the story of brewing beer in Rochester, New York.

We hope you will join us to enjoy a nice cold Genesee Beer!

About PAR

PARALEGAL ASSOCIATION of ROCHESTER, INC.

The Paralegal Association of Rochester, Inc. (PAR) is a not-for-profit organization serving paralegals and the legal community of the Greater Rochester Area since 1975. Membership is open to qualifying paralegals, legal assistants, paralegal students, paralegal educators, and others throughout the Greater Rochester Area and surrounding counties. PAR endeavors to maintain high standards of ethical conduct for paralegals in the local community, to encourage continuing education and to act as a resource for the paralegal profession.

PAR regularly hosts Continuing Legal Education (CLE) programs for members as well as networking and community volunteer events throughout the year. Specialty practice sections of the organization provide an extra opportunity for members to network and attend functions particular to the area of law in which they practice. PAR collaborates with paralegal education programs at local colleges to encourage student involvement and to provide students with opportunities to connect with experienced paralegals.

In 1981 PAR became the 30th member association of the National Federation of Paralegal Associations, Inc. (NFPA). PAR is also a founding member of the Empire State Alliance of Paralegal Associations, Inc. (ESAPA) which was created in 1988.

We are thrilled to be hosting the 2019 NFPA Annual Convention and Policy Meeting in Rochester, NY.

Friday In-House Paralegals Breakfast

Friday, October 11, 7:30-8:30 a.m.

Are you an In-House paralegal? Want to network with other In-House paralegals? The NFPA In-House Committee is holding a breakfast hosted by CT Corporation specifically geared toward the unique needs of in-house paralegals. The event is free, but limited to the first 35 registrants. Select this option on your registration form – don't delay!

sponsored by

CT Corporation

Wolters Kluwer

Friday Evening Social: George Eastman Museum

Entrepreneur George Eastman (1854-1932), the pioneer of popular photography founded The Eastman Kodak Company, known around the world as Kodak, in 1888. In 1905, he completed his Colonial Revival mansion on East Avenue in Rochester, NY and resided there until his death in 1932.

Eastman's house presented a classical facade of decorative craftsmanship. Beneath this exterior were modern conveniences such as an electrical generator, an internal telephone system with 21 stations, a built-in vacuum cleaning system, a central clock network, an elevator, and a great pipe organ.

Eastman was involved in every aspect of the construction, paying close attention to detail and requiring the use of high-quality materials. To design the interior, Eastman hired William Rutherford Mead (1846–1928) of the premiere New York firm McKim, Mead & White, which had worked on Andrew Carnegie's house in New York and on the White House. The total cost of the initial construction was $335,000 (around $9 million today). Eastman's mansion was completed in 1905, and he celebrated with a gala that October.

Friday, October 11

Station Party, Cash Bar and Special Tour of the Mansion

Begin boarding bus at 5:45 p.m.
Bus to run every 10 minutes.
$85 per person

sponsored by

NIXON PEABODY

PAR would like to thank Hedonist Chocolate for their amazingly delicious chocolate contributions to our 2018 passing of the Torch ceremony from Seattle (WA) to Rochester (NY) and for the 2019 NFPA Annual Convention and Policy Meeting.
https://hedonistchocolates.com/

Continuing Legal Education
Thursday, October 10 | 8:30-9:45 a.m.

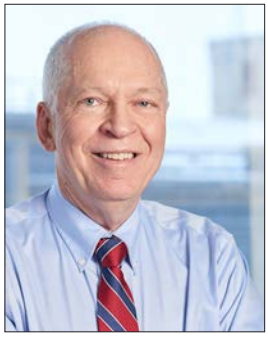
Session 1A

Mediations and Arbitrations — Why They Can be a Tool for a Successful Settlement *(1.25 CLE)*

Hon. Robert J. Lunn (RET. Supreme Court Judge), Trevett Cristo P.C.

This session will explore Arbitrations and Mediations and discuss the differences; preparation with the parties and the mediator; the importance of neutrality and confidentiality; and the review of the federal model and current rules.

Session sponsored by Legal Med



Judge Lunn is an effective mediator and arbitrator with an impressive success rate as a certified federal mediator for the Western District of New York - Federal Court. He spent 14 years as a New York Supreme Court Justice where he served as a trial court judge followed by 4 years as an Appellate Court Justice. Judge Lunn received his JD from Cornell Law School in 1974 and a B.A. from the University of Rochester in 1969. He is presently a partner in the firm of Trevett Cristo P.C.

Session 1B

When Things Go Wrong — Contested Probate and Accountings *(1.25 CLE)*

Michael A. Burger, Esq., Partner, Santiago Burger LLP

This session will be a lesson on defensive estate planning and how to avoid a Will contest. Mr. Burger will review in detail probate proceedings and how to anticipate issues arising; SCPA 1404 examinations; testamentary capacity and undue influence; post objection discovery procedures and trial. This presentation will also include compulsory accountings; SCPA 2211 examinations and the forms to use to file objections for trial.

Session sponsored by Broom Clean Estate Services

A founding partner of Santiago Burger LLP, Michael A. Burger began his legal career at the New York City bar, representing clients before trial and appellate courts. In 1999, Mr. Burger moved his practice to Rochester, NY, but continues to serve his "downstate" clients at "upstate" rates. Mr. Burger has gained client and peer recognition as a Business Litigation "Super Lawyer" and often acts as special or trial counsel, collaborating with other lawyers who face discrete litigated issues. Clients seeking his advice and representation have included shareholders, partners, LLC members, executors, administrators, trustees and other fiduciaries facing a wide range of legal issues including will and trust contests.

Continuing Legal Education
Thursday, October 10 | 8:30-9:45 a.m.

Session 1C

Fair Debt Collection Practices and the Law *(1.25 CLE)*

Joseph M. Shur, Esq., Partner, Relin, Goldstein & Crane, LLP

This session will cover the Fair Debt Collection Practices Act; differences between retail and commercial collections; what is a mechanic's lien; the collections process including important time-frames and deadlines that need to be managed.

Mr. Shur began his legal career at the Monroe County District Attorney's Office in Rochester, New York where he indicted more than 70 felony cases and secured convictions in 13 of 15 trials. On the strength of his performance at the District Attorney's Office, he was recruited by the law firm of Relin, Goldstein & Crane, and LLP.

After almost two decades at Relin, Goldstein & Crane, LLP, he spends the majority of his time litigating commercial and retail collection matters in various New York State Courts. He also represents creditors in adversary proceedings in Bankruptcy Court.

Session 1D

Focus on Cybersecurity *(1.25 CLE)*

Alan M. Winchester, Esq., Partner, Harris Beach PLLC

This session will outline what is cybersecurity, compliance and data privacy — how they differ and overlap; what are the hallmarks for a sound cybersecurity compliance program; what are the consequences of stumbling when delivering on the program and how can paralegals help clients with compliance.

Session sponsored by Legal Med

Mr. Winchester leads Harris Beach's cybersecurity practice group and is a member of the firm's Medical and Life Sciences Industry Team for which he primarily handles litigation involving technology and pharmaceutical or medical device products. He is devoted to helping organizations develop and implement compliance and incident response programs for critical infrastructure and systems, offering guidance on legal and regulatory requirements associated with the storage of protected information. Mr. Winchester represents organizations that suffer security or privacy incidents, such as data breaches, in either government investigations or private actions associated with those incidents.

In addition to his legal practice, Mr. Winchester is also the creator and chief development officer for Caetra.io, a wholly-owned subsidiary of Harris Beach.

Continuing Legal Education
Thursday, October 10 | 10:15 - 11:30 a.m.

Session 2A

The Nuts and Bolts of Federal Jurisdiction (Everything You Always Wanted To Know About Federal Jurisdiction But Were Afraid To Ask) *(1.25 CLE)*

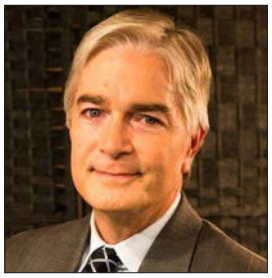
Judge Elizabeth A. Wolford, United States District Judge, Western District of New York
John P. Bringewatt, Senior Associate, Harter Secrest & Emery, LLP
David H. Tennant, Law Office of David Tennant, PLLC

A federal district court judge (Hon. Elizabeth Wolford) and two experienced federal court litigators who are both former federal law clerks (David Tennant and John Bringewatt) will provide an overview of federal jurisdiction: What makes a federal case? What are the limits on federal jurisdiction? Practically speaking, what are the jurisdictional problems and challenges that arise when litigating cases in federal court? The session will include specific topics, such as: pleading federal subject matter jurisdiction (federal question and diversity); motion practice challenging subject matter jurisdiction; the federal court's duty to ensure subject matter jurisdiction exists ("sua sponte" review); the loss of subject matter jurisdiction by addition of parties / inability to add parties; special jurisdictional issues that arise when cases are removed from state court and disappearing subject matter jurisdiction—now you have it, now you don't.

Session sponsored by Legal Med

Elizabeth A. Wolford was appointed United States District Judge for the Western District of New York by President Obama on December 17, 2013. She practiced for over 20 years in civil litigation.

Mr. Bringewatt, a Senior Associate at Harter Secrest & Emery LLP, helps clients navigate government investigations and complex civil litigation.



Mr. Tennant focuses his practice on Appellate; Indian Law; Complex Commercial Litigation and Professional Responsibility.

Session 2B

Working with the New York State Attorney General's Office: The Procedures and Rules *(1.25 CLE)*

Audrey Cooper, Assistant Attorney General, NYS Attorney General's Office

This session will delve into how estates and trusts get involved in the first place with the Attorney General's Office and why; SCPA 1409 and citing the Attorney General; unknown distributees or legatees and following the rules correctly; administration of estates and trusts and important timely communications with the AG's office.

Ms. Cooper graduated from SUNY Buffalo Faculty of Law & Jurisprudence in 1985, after being employed as a paralegal for several years by a small law firm in Rochester, NY. After practicing law as an associate, as a solo practitioner, and eventually as a partner in the same firm which had employed her as a paralegal, in 1998 she joined the Attorney General's Office as an Assistant Attorney General in the Rochester Regional Office, which serves a seven-county region in NYS.

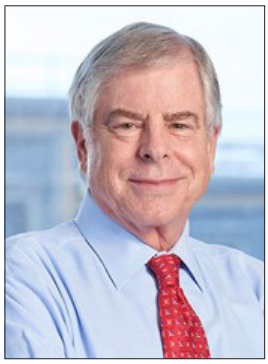
Continuing Legal Education
Thursday, October 10 | 10:15 - 11:30 a.m.

Session 2C

The Paralegal's Role in the Practice of Real Estate *(1.25 CLE)*

William N. LaForte, Esq., Trevett Cristo P.C..

In this session we will review in detail commercial versus residential real estate and related legal issues for both. Mr. LaForte will discuss the role that the paralegal plays with regard to a residential closing; the work that needs to be done from the time the client signs a purchase offer to the actual closing and explain all the relevant paperwork. As an extra bonus, we will hold a mock closing for Mr. & Mrs. Nathaniel Rochester that will be informative and fun.



Mr. LaForte is a Partner in the law firm of Trevett Cristo, P.C. Prior to joining Trevett, over six years ago, he was the leader of the real estate practice group at Harter Secrest & Emery LLP, where he practiced for almost 40 years. He represents real estate developers and counsels those developers in the planning, acquisition and development of all types of real estate. A major portion of Mr. LaForte's practice is also representation of buyer's and seller's in residential real estate matters.

Session 2D

Social Security Disability and Supplemental Income: An Overview of the Rules *(1.25 CLE)*

Steven P. Dolson, Esq., PLLC

This session will cover information regarding Social Security Disability (SSD) and Supplemental Security Income (SSI). Mr. Dolson will discuss basic eligibility and terminology; disability definition with Social Security rules; the 5-step sequential disability finding process and the administrative procedures for claims.

Mr. Dolson is an attorney based in Syracuse, New York. He holds an undergraduate degree in Political Science from LeMoyne College and earned his Juris Doctorate from the State University of New York in Buffalo. His practice primarily consists of representing claimants for Social Security Disability, SSI claims, and consumer bankruptcy. He is a Past President of the Central New York Bankruptcy Bar Association and a member of the National Organization of Social Security Claimants Representatives.

Continuing Legal Education
Thursday, October 10 | 1:15 - 2:30 p.m.

Session 3A

Appellate Practice with a Focus on NYS Rules and E-filing *(1.25 CLE)*

Robert C. Brucato, Esq., Counsel Press

This session focuses on the new Statewide Practice Rules, 22 NYCRR Part 1250 which took effect on September 17, 2018 as well as the Fourth Department's Local Rules, 22 NYCRR Part 1000. In addition, the e-filing rules and requirements, 22 NYCRR Part 1245, will also be discussed. Mr. Brucato will discuss trends in the appellate requirements.

Rob Brucato opened Counsel Press's Buffalo Office in 1992 and has managed it continuously since then. During his more than 25 year career, he has been personally involved with several thousand appeals, primarily to the N.Y.S. Appellate Courts and the U.S.C.A. for the Second Circuit. Prior to joining Counsel Press, Mr. Brucato worked for a short time with the U.S. Small Business Administration and was also in private practice.

Session 3B

Fiduciary Income Tax: Planning and Preparation *(1.25 CLE)*

Darice Dinsmore Hickey, Esq., HSBC US Retail Banking and Wealth Management

In this session, Ms. Hickey will focus on fiduciary income tax return preparation and the importance of tax planning. This will include recent changes to the federal tax law; understanding how deductions can play a role in planning and tax results; and review of tax forms.

Darice L. Hickey is legal counsel for HSBC US Retail Banking and Wealth Management. Additionally, she assists HSBC Private Bank in relation to the Private Wealth Solutions team. Ms. Hickey received her LL.M. degree in taxation from New York University School of Law. She earned her J.D. from the State University of New York at Buffalo, cum laude, with a concentration in finance transactions.

Continuing Legal Education
Thursday, October 10 | 1:15 - 2:30 p.m.

Session 3C

Choosing an Entity - Impact of New Tax Regulations on the Choice of Entity and Basic Non-Tax Considerations *(1.25 CLE)*

Julia A. Garver, Esq., Merzbach & Solomon, P.C.
Shelby L. Stenson, CPA, Mengel Metzger Barr & Co. LLP

This session presents an overview of some of the tax points that should be kept in mind when deciding which business structure to choose, particularly in light of new tax regulations that have changed the key considerations. It focuses primarily on the taxation of the partnership and corporate forms of doing business, the pros and cons of each, as well as the distinctions between C corporations and S corporations, but will also briefly cover sole proprietorships.

This session will also cover the impact of new tax regulations and major non-tax considerations when choosing the appropriate business entity. Learn why a form of entity makes the most sense for a particular client.

Session sponsored by United Corporate Services, Inc

Julia A. Garver, Esq. is of counsel to Merzbach & Solomon P.C. She concentrates her practice in general corporate and business law, including securities and tax exempt organization law. Her work includes business formations, acquisitions and mergers, private placements and venture capital transactions, technology licensing, employment and consulting agreements, business succession planning and related matters.

Shelby L. Stenson, CPA, is a Partner in the Rochester office of Mengel, Metzger, Barr & Co., LLP, with over 20 years of experience, specializing in audits and taxation of construction contractors, financial/professional service firms, and many other types of closely held businesses. Leader of the firm's Construction Industry Group focusing on proactive service and maintaining a high level of knowledge on the challenges these industries face in today's marketplace.

Session 3D

Ethics for Paralegals Beginning Their Careers *(1.25 Ethics CLE)*

Margaret Phillips, J.D., Associate Professor and Director, Paralegal Studies Program at Daemen College

In this session, Ms. Phillips will review the "Big Three" ethical rules; examples of Unauthorized Practice of Law; and discuss application of those concepts to the work of paralegals.

Margaret L. Phillips, J.D., is an Associate Professor and the Director of the Paralegal Studies program at Daemen College. Prior to that she was a Lecturer at the University of Buffalo Law School, where she taught Legal Research and Writing to first year law students. She was a litigation associate at Connors & Vilardo and Phillips Lytle, and also an Appellate Court Attorney for the New York State Supreme Court Appellate Division, Fourth Department.

Continuing Legal Education
Thursday, October 10 | 2:45 - 4:00 p.m.

Session 4A

Litigation - Cradle to Grave *(1 CLE, .25 Ethics CLE)*

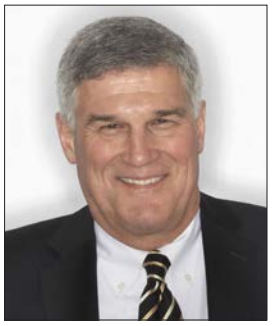
William G. Bauer, Esq., Partner, Woods Oviatt Gilman LLP

The life cycle of a litigated matter can take years or, in some cases, can be resolved prior to filing suit. There are many questions to be asked and issues to be resolved through the litigation process from the first client contact to the closing of a lawyer's file.

Paralegals are prohibited from the Unauthorized Practice of Law, but must be aware of the Code of Professional Responsibility to which their attorneys are bound to in order to fully be prepared for the litigation process and the inevitable twists and turns you encounter.

This session will cover the following topics: who, what, where, when and why; pre-suit issues to address; filing suit and in-suit issues in addition to trial and after trial resolutions.

Session sponsored by Legal Med



William G. Bauer is a Partner in Woods Oviatt Gilman LLP's Labor & Employment Department and is Chair of the firm's Litigation Department. He concentrates his practice in business and civil litigation, including labor and employment, corporate/partnership, commercial and contract disputes and personal injury cases. Mr. Bauer rejoined the firm in February 2003 after serving four years as U.S. Magistrate Judge for the Western District of New York. He is active in court sponsored and private alternate dispute resolution, is a certified mediator for the Western District of New York's ADR Program and has received extensive training for the Federal Judicial Center. He received his J.D. Degree from Albany Law School and his B.S. Degree, magna cum laude, from SUNY at Brockport. He has been designated as a "Best Lawyer in America" for seven consecutive years.

Session 4B

Planning and the Law Concerning Medicaid, the Elderly, and Guardianships *(1.25 CLE)*

Richard A. Marchese, Esq., Woods Oviatt Gilman LLP

In this session, Mr. Marchese will review why the high cost of long-term care necessitates planning; what is long term care insurance; Medicaid planning and the law; eligibility for Medicare plus the federal and state regulations to review and understand.

Richard A. Marchese is a Partner at Woods Oviatt Gilman LLP and co-chair of the firm's Elder Law and Health Care Practice Group. He concentrates his practice in the areas of long-term care and estate planning, Social Security, asset protection and use of trusts, and Medicare/Medicaid eligibility. He received is JD Degree from New York Law School and his BA from the State University of New York at Albany.

Session 4C

Public Record Due Diligence in Modern Transactions: UCC, Tax Liens, Judgment Liens and Intellectual Property Liens *(1.25 CLE)*

Despina Shields, VP of UCC Product Management at COGENCY GLOBAL, INC.

There has been a dramatic shift in the last 20 years in the value of intellectual property (IP) assets held by companies versus tangible property assets. Best practices have evolved to ensure that the value of IP assets are properly addressed in the due diligence process. This session covers what to search, where to search, and what name(s) to search for through public record due diligence.

This session will also include discussion on different types of intellectual property and liens.

Despina Shields is a Vice President of UCC Product Management at COGENCY GLOBAL, INC. Ms. Shields has extensive secured transactions experience and has been in the UCC services industry since 1988. Her experience with state and local filing offices will make it possible for her to share specialized techniques for searching and filing with those attending this session.

Session 4D

Ethics for Seasoned Paralegals *(1.25 Ethics CLE)*

Margaret Phillips, J.D., Associate Professor and Director, Paralegal Studies Program at Daemen College

In this session, Ms. Phillips will present specific scenarios involving paralegals and ethical issues such as conflicts of interest, unauthorized practice of law, client confidentiality, appropriate supervision and client trust accounts.

She will also cover case law from around the country and ABA ethics opinions on these matters.

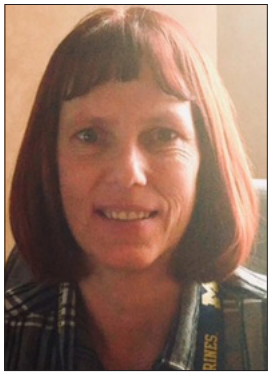
Margaret L. Phillips, J.D., is an Associate Professor and the Director of the Paralegal Studies program at Daemen College. Prior to that she was a Lecturer at the University of Buffalo Law School, where she taught Legal Research and Writing to first year law students. She was a litigation associate at Connors & Vilardo and Phillips Lytle, and also an Appellate Court Attorney for the New York State Supreme Court Appellate Division, Fourth Department.

She has published articles on paralegals and ethics, trends in legal education, a book review on a legal textbook, and is the author of "A Practical Guide to Legal Research and Analysis for Paralegal and Legal Studies" (West Academic; forthcoming Fall 2019). Margaret earned her J.D. cum laude, from the University at Buffalo Law School.

Thursday, October 10 at 4:15 - 5:15 p.m. *(Free to all Attendees)*

Student Workshop: Getting and Keeping a Paralegal Position in Today's World

Reagan Weinhart, Bankruptcy Supervisor and Paralegal, Fein, Such & Crane, LLP, Jamie Page, Senior Manager of Human Resources and Associate Programs, Harris Beach PLLC, and Susan LaSalle Sergeant, TalentBridge



A Panel Discussion with:

Reagan Weinhart is a Board Member of the Paralegal Association of Rochester, Inc. and has been a paralegal for over 20 years. She is employed at Fein, Such & Crane, LLP as a paralegal in Creditor Rights, specifically Bankruptcy, her area of expertise. Reagan will discuss her experiences working as a paralegal.

Jamie Page is a Senior Manager of Human Resources at Harris Beach PLLC where she has worked for over 15 years. Prior to joining HB, Jamie worked at Duane Morris LLP and Schnader Harrison Segal & Lewis LLP in Philadelphia. Her career has focused on recruiting, training and programming, retention and employee relations for professional staff and associates. Jamie received her BA in Communications from SUNY Oswego and completed several graduate level courses in Counseling at Rowan University.

Susan LaSalle Sergeant joined TalentBridge as the Director of Legal Recruiting in October, 2014 after a 31 year career in legal – she was tasked with building the legal recruiting division for the company. She understands the unique nature of law firms and has a keen understanding of the types of candidates that will be successful in any type of legal position. Susan will present some very practical advice and insight for our attendees.

Session sponsored by Merzbach & Solomon, PC

Workshop A: Defusing Difficult Conversations in the Workplace — Mindsets and Skill Sets

Lesley Diaz, Collaborance

At some point during our workday, we can all find ourselves in situations that become emotionally charged; perhaps dealing with an unhappy client, a stressed-out boss or an angry, frustrated colleague. Despite our best efforts, highly charged conversations have a way of escalating quickly. In this workshop, we learn some simple facts about how our emotions work, how to avoid becoming defensive, and how to calm tense situations and improve the flow of information. We will approach this topic in an interactive, playful and participative way. Our format will allow participants to share their experiences and use simple methods to resolve their own real-life scenarios.

Ms. Diaz is a small business owner, organizational consultant and educator with almost thirty years' experience in learning, leadership, decision-making and change. She has degrees in Leadership, Organizational Psychology & Collaborative Counseling and has worked in a wide range of industries both here in the USA and in Australia. Lesley's passion is helping organizations create collaborative and innovative cultures through skillful dialogue and respectful disagreement — vital skills in today's collaborative economy.

Thursday, October 10 at 4:15 - 5:15 p.m. *(Free to all Attendees)*

Workshop B: Exploring Our Own Relationship with Unconscious Racial Bias

Maisha Enaharo, Director of the Dept. of Pediatrics, Rochester Regional Health and

Kathy Sweetland (Retired) University of Rochester

This interactive workshop will allow participants to reflect on their racial identities, explore issues around unconscious racial bias, and discuss the interconnected levels of structural racism.

Maisha Enaharo is the Director of the Dept. of Pediatrics at Rochester Regional Health and a leader of their Diversity & Inclusion initiatives. With a background in public health and Marriage & Family Therapy, she also serves as a clinical instructor for the Dept. of Psychiatry at the University of Rochester Medical Center. She is a founding member of the Black Women's Leadership Forum and serves as a board member for the YWCA of Rochester and Monroe County; other community involvements include the Racial Equity and Justice Initiative, the Workforce Diversity Network, and discussion groups on race/structural racism. Maisha is the proud single mom of 2 young women making their way in the world.

Kathy Sweetland is a retiree from the University of Rochester where she served as University Intercessor for the last 15 years of her career specializing in sexual harassment and assault and discrimination. She has devoted her time and energies to working with nonprofit organizations in the Greater Rochester community ever since. She is past president (2012-2018) and current member of the Board of Directors of Partners in Restorative Initiatives. She is a former member of Facing Race, Embracing Equity (FREE). Kathy has facilitated workshops at the YWCA several times, including eight-week programs on Witnessing Whiteness and on Unconscious Bias. She is currently co-facilitating workshops on race for the Monroe County Library System.

Workshop C: What if You Could Streamline Your Legal Drafting Process While Also Reducing the Risk of Errors or Inaccuracies

Peter Colin, Jr., Technical Client Manager for Thomson Reuters

What if you could streamline your legal drafting process while also reducing the risk of errors or inaccuracies? Join this session to learn how attorneys and legal professionals like you are incorporating legal drafting technology into their workflow to speed the drafting and review process, feel confident they are citing the strongest authority, and ultimately deliver superior client value.

Peter Colin, Jr., is a Technical Client Manager for Thomson Reuters where he provides technology consulting, thought leadership, and technology services to large and medium USA law firms. Peter serves the top law firms in the country consulting on legal trends and customizing Thomson Reuters legal technology solutions for enhanced workflows. He is the author of trendstechlaw.com contributing articles discussing the latest in legal technology trends and commenting on the legal market. He previously worked in law firms in New York City and was a support analyst for a data and software provider serving broker-dealers and banks trading government-guaranteed debt. Peter is an alum of Northeastern University School of Law and the University of Memphis, and is admitted to the New York bar.

Conference & Event Policy

NFPA is committed to providing a safe, productive, and welcoming environment for all. Please review the NFPA Conference & Event Policy posted at www.paralegals.org for safety tips and steps to take if you experience or witness inappropriate conduct.

Exhibitors and Sponsors (as of 6/26)

Sponsors

- Advanced Paralegal Institute (Certification Ambassador Award)
- All New York Process Servers (Friday PM Break)
- Bond, Schoeneck & King, PLLC (Thursday Lunch)
- Broom Clean Estate Services (CLE session)
- CT Corporation (In-House Paralegal Breakfast)
- Harris Beach (Name Badges)
- Legal Med (CLE sessions)
- Merzbach & Solomon, P.C. (Student Event)
- Nixon Peabody LLP (Social Event)
- Paralegal Education Group (PCCE Scholarship)
- Robson Forensic, Inc. (Lanyard)
- Thomson Reuters (Student Scholarships)
- Trevett Cristo P.C. (Thursday Breakfast and Thursday PM Break)
- United Corporate Services, Inc. (CLE session)
- VeriFyle, Inc. (Friday Lunch)
- Woods Oviatt Gilman LLP (Convention bag)

Exhibitors

- All New York Process Servers
- Broom Clean Estate Services
- CSC
- Counsel Press
- George Washington University Paralegal Program
- International Business Company Formation, Inc.
- IntoxaLock
- Legal Med
- National Association of Professional Process Servers
- Monroe Community College/Law and Criminal Justice Department
- Paranet
- PohlmanUSA
- Registered Agent Solutions, Inc.
- Robson Forensic, Inc.
- Stewart Title Insurance Company
- The TASA Group
- Thomson Reuters
- United Corporate Services, Inc.

Exhibit Space and Sponsorship Opportunities Still Available

Exhibit Hall Hours

Thursday, October 10, 2019

7:30 a.m. - 7:30 p.m.

Breakfast and Breaks will be dedicated exhibit times with food and beverage functions in the Hall during these times. The Exhibitor Reception will be held in the Exhibit Hall from 5:30 - 7:00 p.m.

Friday, October 11, 2019

7:30 a.m. - 12:00 p.m.

Breakfast and Breaks will be dedicated exhibit times with food and beverage functions in the Hall during these times. NFPA will conduct the Exhibitor give-aways in the Exhibit Hall on Friday.

Attendees must be present to win.

Standard Exhibit Package $1,110*

Exhibitors will have a six-foot draped table to display their products and services during both exhibit days. The package will include a six-foot draped table and two chairs. This includes breakfast, lunch, and breaks on Thursday and Friday as well as the Exhibitor Reception for one representative.

Social event tickets available for purchase.

- Exhibitor can offer giveaway
- Name listed on NFPA website, Convention App and Event Program Exhibitor Directory.

Add an additional Exhibitor Registration to your booth for only $125 per person.

Reserve your booth or sponsorship online at http://www.paralegals.org/2019convention or call 317-454-8312

Exhibit price increases to $1,400 after July 1.

Reinforce your company's message among an elite group of decision makers.

Be recognized in the Convention Program, NFPA's and PAR's websites, and convention signage.

Many sponsorship options. Call 317-454-8312 to check availability.

NFPA® Annual Convention Registration Form

- Online at www.paralegals.org using your credit card or e-check.
- Fax your completed form with credit card payment to (317) 454-8322.
- Mail your completed form with check or credit card payment to: NFPA, 3502 Woodview Trace, Ste 300, Indianapolis, IN 46268
- **If you are an education program/employer registering more than two people and want to take advantage of the registration discount, please complete a form for each person and contact the NFPA office to submit payment.**

Personal Information

Name _____ Certification _____

Local Association _____ Employer _____

Mailing Address _____ Daytime Phone _____

E-mail _____ City _____ State _____ Zip _____

CHECK WHERE APPLICABLE

- ☐ This is my first NFPA Convention.
- ☐ This is my first NFPA Convention as a Delegate.
- ☐ I would like to be assigned a Convention Mentor.
- ☐ I would like to serve as a Convention Mentor.
- ☐ I am attending ___I, ___II, ___III, ___IV, ___V Region Meeting.
- ☐ I am attending the Thursday Board Meeting and accept the NFPA Confidentiality Agreement (Members Only)
- ☐ I am attending the Treasurer's Meeting (members only).

DEMOGRAPHICS SURVEY

Please take a moment to let us know a little about the work you do. This information will be used anonymously and in the aggregate and will help our future Conventions be more relevant for those attending. You may select more than one area of law, if applicable.

Areas of Law

- ☐ Bankruptcy
- ☐ Corporate/Business
- ☐ Criminal
- ☐ Domestic Relations/Family Law
- ☐ Environmental
- ☐ Estates/Trusts
- ☐ Intellectual Property
- ☐ Labor/Employment
- ☐ Personal Injury
- ☐ Real Property
- ☐ Litigation
- ☐ Other_____

Employer Type

- ☐ Corporate
- ☐ Government
- ☐ Law Firm
- ☐ Freelance/Contract
- ☐ Military
- ☐ Other_____

Registration Fees

	Early By 8/9	Regular By 9/10	Late After 9/10	Totals
Thursday Education Seminars				
☐ Member All-Day Rate (includes lunch)	$250	$260	$280	$_____
☐ Non-Member All-Day Rate (includes lunch)	$280	$300	$320	$_____
☐ Students All-Day Rate (includes lunch)	$160	$180	$200	$_____
☐ Member Half-Day Rate (seminars only)	$155	$165	$185	$_____
☐ Non-Member Half-Day Rate (seminars only)	$180	$200	$220	$_____
☐ Student Half-Day Rate (seminar only)	$95	$105	$125	$_____
☐ Member Individual Sessions	$80 X ___ (# of sessions)			$_____
☐ Non-Member Individual Sessions	$100 X ___ (# of sessions)			$_____
Policy Meeting				
☐ Local Association Officers	$280	$300	$320	$_____
☐ Policy Meeting Observer (Member)	$ 80	$90	$105	$_____
☐ Policy Meeting Observer (Non-Member)	$200	$220	$240	$_____
☐ Policy Meeting Observer (Student)	$ 25	$ 45	$65	$_____
☐ Policy Meeting Observer (PAR Non Delegate Member/ NFPA Non Delegate Coordinators/NFPA Past Presidents)	No Charge			$_____

Lunch & Events

Wednesday Welcome Reception hosted by PAR. No Cost but RSVP required. Event will have cash bar. ☐

(Note: Thursday lunch is included in full-day education registration.)

Member Lunch	$45	Thursday x _____	Friday x _____	Saturday x _____	$_____
Non-Member Lunch	$55	Thursday x _____	Friday x _____	Saturday x _____	$_____
Student Lunch	$45	Thursday x _____	Friday x _____	Saturday x _____	$_____

Friday In-House Paralegal Breakfast No Cost but RSVP required *(Limited to 35 people. You will be contacted if reservation request cannot be honored)* ☐

Friday Social Event $85 Adult x ____ $_____

Annual Convention Charity *(Minimum $5 donation)*

I will donate to wear jeans on Friday to support the National Susan B. Anthony Museum & House $_____

Accommodations

If selecting any of the following, staff will contact you for additional information:

_____Do you have any medically necessary dietary needs?

_____Do you have any dietary preferences?

_____Do you need assistance with any ADA disabilities?

CLE Seminars on Thursday, October 10, 2019

(Please choose your educational sessions. Descriptions on pages 6-13 of registration brochure.)

8:30 a.m. – 9:45 a.m.	☐ 1A	☐ 1B	☐ 1C	☐ 1D
10:15 a.m. – 11:30 a.m.	☐ 2A	☐ 2B	☐ 2C	☐ 2D
1:15 p.m. – 2:30 p.m.	☐ 3A	☐ 3B	☐ 3C	☐ 3D
2:45 p.m. – 4:00 p.m.	☐ 4A	☐ 4B	☐ 4C	☐ 4D

Workshops on Thursday, October 10, 2019 (Free to all attendees. *Descriptions on pages 14-15 of registration brochure..*)

4:15 p.m. - 5:15 p.m. ☐ Student Workshop ☐ Workshop A ☐ Workshop B ☐ Workshop C

Payment Information

☐ Enclosed is my check payable to the National Federation of Paralegal Associations, Inc.

Charge the specific amount to my ☐ VISA ☐ MasterCard ☐ American Express Total $_____

Card # _____ Exp Date _____ CVV _____

Billing Zip Code _____ Signature _____

Substitutions, Cancellations & Refunds: If you cannot attend you may send a substitute. Requests for substitution must be submitted in writing by email, fax, or regular mail. If you must cancel, requests must be made in writing by email, fax, or regular mail. **Cancellations received on or before Monday, September 13, 2019 are subject to a $50.00 fee. Cancellations received after Monday, September 13, 2019 will forfeit all fees.**

Photo Release Policy: As a condition of admission to this event, all attendees consent to and authorize the National Federal of Paralegal Associations, Inc. to photograph and record video images of themselves at this event and to use and publish the same for educational and promotional activities without compensation. All negatives, prints and digital files shall be solely the property of NFPA.