

***The  
Illinois Paralegal Association  
Presents its***

***2017 SPRING EDUCATION CONFERENCE***



***May 4, 2017  
Robert Morris University***

9:00 am – 10:15 am

**Social Media and eDiscovery – Corporate Best Practices:** By now, it is a well-known fact that social media is discoverable in court. In fact, over 45% of corporations have used publicly available social media content in litigation and fraud investigations, according to a study conducted in 2015 on social media analytics and eDiscovery. This presentation will take a deeper dive into the application of industry best practices including recent case law, challenges law firms and corporations face with social media in court, corporate data collection processes and best practices, social media guidelines for employees, mitigating account ownership and authentication issues, and how to pull data from social media accounts for a case. *Bruce Malter, CEDS, Director of Client Engagement, eTERA Consulting, LLC*

**An Effective Timeline to Trial:** The path to trial often comes with forks in the road. Preparing for an electronic trial shouldn't make your life harder. Come learn how to spot the many pitfalls in trial preparation and turn your pain into productivity. From basic war room techniques to advanced trial presentation strategies – we will cover much ground and get you on the path to a successful trial. *Robert A. Rosenberg, President, Rosenberg Consulting Services, Inc.*

**From The Boulevard to the Slants, The Sensational History of Scandalous, Immoral and Weird Brands and the Application of 15 U.S.C. § 1052(a):** In April, 2016, the United States Patent and Trademark Office (“PTO”) filed a petition for a writ of *certiorari* to the Federal Circuit seeking Supreme Court review of that Court's decision in *In re Tam*, 117 USPQ2d 1001 (Fed. Cir. 2016), holding the disparagement provision of Section 2(a) of the Lanham Act, 15 USC §1052(a), to be facially unconstitutional as a violation of the Free Speech Clause of the First Amendment. The disparagement provision of the Lanham Act has drawn renewed attention since it was used in June 2014 to revoke the Washington Redskins' trademark registrations. This petition for *certiorari* sets the stage for the Supreme Court to review the legality of Section 2(a). 15 U.S.C. § 1052(a) states in part: “No trademark by which the goods of the applicant may be distinguished from the goods of others shall be refused registration on the Principal Register on account of its nature unless it – Consists of or comprises immoral, deceptive, or scandalous matter; or matter which may disparage or falsely suggest a connection with persons, living or dead, institutions, beliefs, or national symbols, or bring them into contempt, or disrepute...” . Mr. Meyers will explore the case history by which the definition of “immoral” has been determined, the differences between “immoral” and “scandalous” brands and evidence used to establish that a candidate brand may disparage and whom it may disparage, and whether the disparage provisions of the Act are invalid under the Free Speech amendment of the U.S. Constitution. He will lead a discussion and Q & A session as well following his presentation. *Fred Meyers, IP Solved, LLP*

**Estate Planning for Digital Assets and Genetic Material:** The Illinois legislature enacted the Uniform Fiduciary Access to Digital Assets Act (UFADAA) to allow fiduciaries access to the principal's digital assets. In this session we will obtain an update on this statute and discuss planning issues related to digital assets such as privacy and ownership, and realize the issues created under the Terms of Service Agreements. We will also identify the important issues in family planning including Assisted Reproductive Technology and genetic material such as eggs, sperm, embryos, and umbilical cord blood. *Jonathan D. Morton, Esq., Golan Christie Taglia*

**Legal Research for the Paralegal:** This session will be a basic overview of effective tools for legal research, focusing on attorney expectations. We will also discuss some effective alternatives to the standard Westlaw Next and Lexis Advanced providers. *Margarite Primozich Loew, MA, JD, Professor, Robert Morris University*

10:45 am – 12:00 pm

**The Internet...Who Can You Trust?:** Jump into cyberspace as we explore the various Secretary of State Websites and find out which ones you can count on for up to date, accurate information. In this seminar, we will be presenting a clear account of the websites you can trust and the ones you should be leery of. We will provide you with an in-depth analysis of which Secretary of State Websites you can count on for correct status information and which are delayed in updating status. In this “do-it-yourself” age, we will educate you on which databases are deemed reliable and which can be misleading. *Lindsay Gates, President/CEO, Service Partners Information Co.*

**OSHA, EPA and Employment Law – a Paralegal's Perspective on Hot Topics:** In this session we will discuss hot topics before the U.S. Occupational Safety and Health Administration, the U.S. Environmental Protection Agency, and in employment law, generally. Topics will be selected from Seyfarth Shaw's law blogs, published in the Workplace Safety and Environmental Law Alert blog, and the Employment Law Lookout: Insights for Management blog. The topics will include primarily blogs prepared at least partially by the speaker, and discussion will include "Bloggging as a Paralegal - The Paralegal's Role". *Craig B. Simonsen, Paralegal, Seyfarth Shaw LLP*

**What is a Survey – And How is it Performed?:** This seminar will introduce the basic concepts of land surveying, including definitions of the most commonly used surveying and legal terminology. We will discuss the many and varied tasks that a Professional Land Surveyor must accomplish in order to provide a *Plat of Survey*. *Mike Vanderwalker, Vanderwalker Land Surveyors and Susan Leo Vanderwalker, Senior Patent Paralegal, Baker & McKenzie LLP*

**Mastering Adobe:** Are you still redacting confidential information with a black Sharpie marker? Still applying stickers at the bottom of each page to Bates number your documents? Save time and learn to do these automatically. This intermediate class on Acrobat Adobe XI Professional will focus on tasks that are used daily in the legal industry such as: editing PDF files, adding annotations and bookmarks, Bates numbering, redacting PDFs and creating PDF portfolios. Come sharpen your paralegal ninja skills! *Susan L. Schafer, IT Trainer, McDermott Will & Emery LLP*

**Tips for Top-Notch Legal Writing:** Legal writing is a skill that can be learned, like any other. This session breaks legal writing into a series of concrete steps and presents them in logical order. Learn tips and techniques you can use to improve your writing, from inception through final edit. *Elizabeth McGuan, Esq., Law Offices of Elizabeth McGuan*

**1:30 pm – 2:45 pm**

**Recent Updates in Employment Law:** Keeping up to date in the ever-changing world of employment laws and regulations can seem daunting. This session will provide an overview of recent changes and updates to laws relating to restrictive covenant agreements (confidentiality and non-compete agreements), class action waiver provisions, paid leave policies (including sick leave and family leave), and privacy and technology policies (including social media policies). *Ashley L. Orler, Esq., Golan Christie Taglia*

**Paralegal's Guide to the Legal Hold Process:** Did you hear the one about how VW's in-house attorneys messed up a litigation hold? It does not matter if you work at a litigious company or not – legal holds can be tricky. Join us for a panel discussion on the legal hold process, preservation of data, and document collection from the unique perspectives of the corporation, the law firm, and the service provider. Learn best practices on how to create a methodical legal hold process in-house by identifying requirements, interviewing key stakeholders, and collecting electronic and paper files from multiple company repositories. You will get practical advice on how to identify trouble spots and how to use your resources. We will also discuss the importance of becoming your employer's technology paralegal. *Diane Diaz, Senior Paralegal, McDonald's Corporation; Tisha Delgado, E-Litigation Paralegal, Golan Christie Taglia; Patricia Flanagan, D4, LLC*

**The Magnitude of Medical Malpractice – Screening, Strategy and Standards:** This session will cover pertinent medical malpractice topics including evaluating medical records to determine if the case is meritorious or defensible and how to screen cases effectively and efficiently. Practical strategies will be discussed regarding obtaining and applying Standards of Care and specific tips when requesting policies and procedures from a healthcare facility. The participant will have a better understanding of the development of the medical malpractice case as well as the components of the litigation process timeline. *Susan V. Haibeck RN MS CLNC, Haibeck and Associates Legal Nurse Consulting*

**Excel Can Do That?!** Every paralegal, no matter what area of law, should know these features. Join us to gain the skills to solve common problems and confidently navigate in Excel. In this intermediate Excel class, you will learn how to use advanced formulas and formatting options, how to sort and filter data, and pivot table basics. Excel 2010 will be presented and attendees should have a basic understanding or working knowledge of Excel. Go back to work with some new tools for your paralegal toolbox! *Susan L. Schafer, IT Trainer, McDermott Will & Emery LLP*

**Federal Rules of Civil Procedure:** This seminar will guide you through the Federal Rules of Civil Procedure from a paralegal perspective. Learn to be proactive in a federal matter as you assist in preparing the complaint, completing proper service, working with the client in preparing discovery, interviewing witnesses, surviving summary judgment and getting ready for trial. We will also discuss the rule changes in the last few years. *Caren Mansfield, CLA, ILAP, Paralegal, Baker, Baker & Krajewski LLC*

**3:15 pm – 4:30 pm**

**Amendments to the Illinois Limited Liability Company Act:** Extensive revisions to the Illinois Limited Liability Company Act will take effect on July 1, 2017. The changes are based in part on the Revised Uniform Liability Company Act. Some of the changes include: expanding the definition of “Operating Agreement” to include oral agreements; providing a default rule that an LLC is “member-managed,” unless the Operating Agreement specifically states otherwise; stating that a member of the LLC is not automatically an agent of the LLC; and revising the rules for converting from one form of business entity to another (e.g. converting from a corporation to an LLC). In this session, we will explore the Act’s numerous revisions and discuss how these changes will affect existing limited liability companies. *Ronald Austin, Jr., Esq. Grant Law, LLC*

**I Can See Clearly Now: The Future of Analytics and Technology for the Legal Professional:** Analytics and new ways to interact with and visualize data promise to revolutionize traditional legal processes. From review in litigation and investigations to automating contracts and other upstream processes, some are predicting that the role of the legal professional will be radically different in the next 5-10 years. Join us for this thought provoking seminar and learn:

- What are the differences in analytics tools from email threading to conceptual clustering to TAR and beyond
- How you can employ analytics today to make a difference in your work...and your career
- What are the courts saying about these new technologies and why
- The impact on ethical obligations and future tech trends

*Doug Kaminski, Director of Major Accounts, kCura and Adrienne Knight, Major Account Manager, kCura*

**Illinois Human Rights Act: Regulations and Procedures:** A broad overview of the operations and priorities of the Illinois Department of Human Rights and treatment of hate crimes under Illinois law. *Ngozi C. Okorafor, Esq., Chief Legal Counsel/Ethics Officer, Illinois Department of Human Rights*

**Understanding Immigration Law and How it Affects You:** There are many avenues available to obtaining legal permanent residency. A wide range of variables can affect the method and the requirements needed to successfully acquire legal status in the United States. In this session we will discuss the most common ways one can obtain legal permanent residency. Current events and issues affecting visa and greencard holders will be highlighted including the rights and the obligations of each. Finally, requirements to obtaining citizenship will be discussed. *Mario A. Godoy, Esq., Godoy Law Office*

**Today's Ethics:** Join us for a fun and informative discussion of paralegal ethics. We will explore the ABA Model Rules of Professional Conduct, the IPA Code of Ethics, and we will discuss how they can be utilized in the daily work of paralegals. Learn how to identify conflicts, deflect potential ethical dilemmas and maximize productivity by learning what substantive legal duties paralegals can perform and the issues they may face. This session will also discuss the pitfalls of social media to the paralegal. *Sharon Patterson, Legal Assistant Supervisor, Goldberg Kohn Ltd. and Caren Mansfield, CLA, ILAP, Baker, Baker & Krajewski LLC*

**REGISTRATION FORM**  
**Robert Morris University**  
**401 South State Street, 6<sup>th</sup> Floor, Chicago, Illinois**

Please consider the environment and assist the IPA in going green by registering online at [www.ipaonline.org](http://www.ipaonline.org). You may also mail the registration form and payment to the Illinois Paralegal Association, P.O. Box 452, New Lenox, Illinois 60451-0452. If you would like to receive a confirmation of your registration, please include your email address. Exhibitors and Sponsors will be provided with names/addresses/email addresses of all registrants. We cannot always control the air temperature in the classrooms. Therefore, please come prepared by dressing in layers. Proper dress is required for all IPA events (Business Casual). Parking is available at the Congress Theatre Parking lot located on Congress/Wabash. Validate your parking ticket using the validation stamper located in the lower level of RMU in the center of the building for a discount off parking at this location.

**Registration Information:** Mailed registration forms must be postmarked on or before April 30, 2017 to avoid paying the Late Registration rate. Beginning May 1, 2017, Late Registration rates apply. Registration fee includes attendance, handout materials, and breaks. **Lunch is not included in registration fees. There are many nearby restaurants for you to enjoy lunch on your own, or an optional boxed lunch can be purchased for an additional cost.**

**Cancellations and Substitutions:** A full refund is available upon receipt of written request received by April 30, 2017. Substitution of registrants is permitted.

**Tax Deductions:** An income tax deduction may be allowed for expenses of education undertaken to maintain and improve professional skills. See your tax advisor for more information.

**CLE Info:** This activity has been approved for Continuing Legal Education credit by the National Federation of Paralegal Associations.

Please list me as follows in the conference's "Directory of Participants": (Type or Print Clearly)

Name: \_\_\_\_\_ Firm/Organization \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip Code \_\_\_\_\_

Telephone: \_\_\_\_\_ Email Address: \_\_\_\_\_

☐ I would like to volunteer to serve as a **PROCTOR** (Proctors are responsible for introducing the speaker, reading some brief announcements, passing out handouts and evaluation forms, overseeing the sign-in/sign-out process, distributing CLE certificates, and thanking the speaker. It is very simple to do, but so very important. If you would like to proctor any of the seminars that you are attending, please indicate here.)

☐ **NON-MEMBER** (Visit IPA's website for information on membership to receive the discounted member rate.)

**Session Topics:** IPA reserves the right to cancel or modify the conference as necessary. Registrants will be advised in advance of schedule or speaker changes, if possible.

SEMINAR REGISTRATION FORM			
Please <b>Check</b> or <b>Circle</b> the Educational Seminars You Will Attend			
Thursday, May 4, 2017			
9:00 a.m. – 10:15 a.m.	10:45 a.m. – 12:00 p.m.	1:30 p.m. – 2:45 p.m.	3:15 p.m. – 4:30 p.m.
Social Media and eDiscovery – Corporate Best Practices	The Internet...Who Can You Trust?	Recent Updates in Employment Law	Amendments to the Illinois Limited Liability Company Act
An Effective Timeline to Trial	OSHA, EPA and Employment Law -- a Paralegal's Perspective on Hot Topics	Paralegal's Guide to the Legal Hold Process	I Can See Clearly Now: The Future of Analytics and Technology for the Legal Professional
From The Boulevard to the Slants, The Sensational History of Scandalous, Immoral and Weird...	What is a Survey – And How is it Performed?	The Magnitude of Medical Malpractice - Screening, Strategy and Standards	Illinois Human Rights Act: Regulations and Procedures
Estate Planning for Digital Assets and Genetic Material	Mastering Adobe	Excel Can Do That?!	Understanding Immigration Law and How it Affects You
Legal Research for the Paralegal	Tips for Top-Notch Legal Writing	Federal Rules of Civil Procedure	Today's Ethics

## IPA MEMBER REGISTRATION FEES

**Lunch is not included in registration fees, but is available for purchase as an additional option.**

### ● FULL DAY (4 sessions)

- ☐ \$175 IPA Member Registration  
(Postmarked on or before April 30, 2017) \*\*\*BEST VALUE\*\*\*  
☐ \$200 IPA Member beginning May 1, 2017 and On-Site

### ● HALF DAY (2 sessions)

- ☐ \$125 IPA Member Registration  
(Postmarked on or before April 30, 2017)  
☐ \$150 IPA Member beginning May 1, 2017 and Day of Event Registrations

### ● QUARTER DAY (1 session)

- ☐ \$75 IPA Member Registration  
(Postmarked on or before April 30, 2017)  
☐ \$100 IPA Member beginning May 1, 2017 and Day of Event Registrations

## NON-MEMBER REGISTRATION FEES

### ● FULL DAY (4 sessions)

- ☐ \$225 Non-Member Registration  
(Postmarked on or before April 30, 2017) \*\*\*GREAT VALUE\*\*\*  
☐ \$275 Non-Member beginning May 1, 2017 and On-Site

### ● HALF DAY (2 sessions)

- ☐ \$150 Non-Member Registration  
(Postmarked on or before April 30, 2017)  
☐ \$175 Non-Member beginning May 1, 2017 and Day of Event Registrations

### ● QUARTER DAY (1 session)

- ☐ \$100 Non-Member Registration  
(Postmarked on or before April 30, 2017)  
☐ \$125 Non-Member beginning May 1, 2017 and Day of Event Registrations

## LUNCH ON YOUR OWN

(from 12:00 pm – 1:30 pm)

**A boxed lunch is optional and available for purchase. All boxed lunches include kettle chips, couscous salad, a cookie, and bottled water. If you would like to purchase the OPTIONAL lunch, please mark your selection below. Unfortunately, we cannot accommodate any special requests for the optional boxed lunch. Lunch cannot be purchased after April 30<sup>th</sup>.**

☐ \$15.00 IPA Member

☐ \$20.00 Non-Member

☐ Turkey Fresco Sandwich: Honey roasted turkey breast, aged white cheddar, leaf lettuce, tomato, basil & tarragon infused aioli on an artisan roll

☐ Roast Beef Sandwich: Roast beef, caramelized onions, Portobello mushrooms, leaf lettuce, grain mustard on 9 grain bread

☐ Kicked Up Chicken Caesar Wrap: Grilled chicken breast, romaine lettuce, seasoned golden croutons, chipotle pepper Caesar dressing in a tomato tortilla

☐ Hummus & Roasted Vegetable Wrap: Spiced hummus, balsamic & herb marinated grilled vegetables, romaine lettuce in a spinach tortilla

## PAYMENT

☐ CHECK. Enclosed is a check in the amount of \$\_\_\_\_\_ made payable to the Illinois Paralegal Association.

☐ CREDIT CARD. Please fax registration to 815.462.4696. Please charge to my: ☐ VISA ☐ MASTERCARD ☐ DISCOVER ☐ AMERICAN EXPRESS

Name on Card \_\_\_\_\_ Signature \_\_\_\_\_

Card Number \_\_\_\_\_ Security Code \_\_\_\_\_ Expiration Date \_\_\_\_\_

Billing Address \_\_\_\_\_ Billing City \_\_\_\_\_ Billing State \_\_\_\_\_ Billing Zip Code \_\_\_\_\_