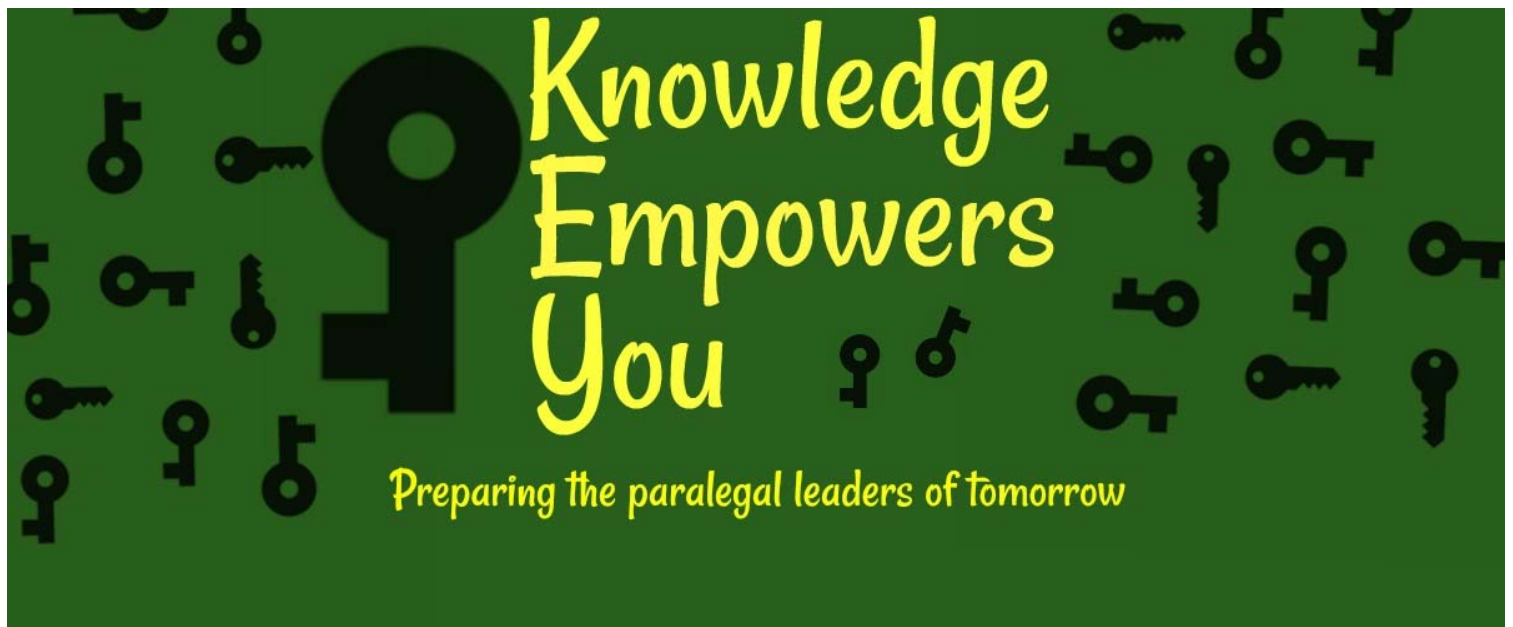


*The
Illinois Paralegal Association
Presents its*

2018 FALL EDUCATION CONFERENCE



***November 7, 2018
9:00 AM – 5:00 PM Education
The Palmer House Hilton***

9:00 am – 10:15 am

Intro to Business Entity Tax Elections: Choosing a federal tax classification is key to the formation and operation of any business. While the analysis of which classification is appropriate to a given entity must be conducted by an attorney, paralegals are frequently asked to help prepare and file any elections required to achieve the intended status with the Internal Revenue Service, necessitating an understanding of the theory and mechanics behind these classifications. This session will cover the basics of “Check the Box” regulations (including eligible entities and default classifications) and common elections affecting business entities such as S Corporation, 501(c)(3) organization, and REIT, as well as a brief overview of the state-law entity types to which these elections are typically applied. *Kathleen Parker, Senior Paralegal, Equity Commonwealth*

Mobile Discovery – Outsmarting the Smartphone: Six billion smartphones will be in circulation by the year 2020. These phones and other mobile devices can leave behind an indisputable digital trail, and the electronically stored information (ESI) on them can often be relevant, unique, and discoverable. Many employees freely admit sending confidential company information with their mobile device. Is this important source of ESI part of your eDiscovery/investigative strategy? *Melody Haase and Chad Gough, 4Discovery*

Hospitality and Alcohol Beverage Law and Licensing: Liquor licensing in Illinois, particularly in Chicago, is an ever changing, challenging area of practice. Ranging from the licensing of downtown food halls, big box stores, to complex hotel deals, and encompassing the licensing of upstart craft brewing and distilling operations, including tap rooms and tasting rooms, now populating Chicago neighborhoods. Learn about the intricacies of Regulatory Compliance processes and procedures in Illinois! Bring your Chicago related license questions and learn more about how to help businesses and clients succeed and maintain compliance with the laws in this exciting Industry. *James Webster, Partner, Webster Powell, PC*

How to Protect Your Clients at Closing: It seems like the world of real estate closings is constantly changing. We have transitioned from HUD's to closing disclosures in the recent past now we are dealing with things like wire fraud and elder abuse. Find out what new trends are on the rise in real estate and how to protect your clients. *Amanda Ley, Senior Escrow Officer, Proper Title LLC*

Paralegal Ethics, Rules & Guidelines – Follow Your Moral Compass: This will be an interactive seminar with discussions on navigating ethical pitfalls. *Mary Kay Lieberman, RP®. ILAP, Cunningham, Meyer & Vedrine, P.C.*

10:45 am – 12:00 pm

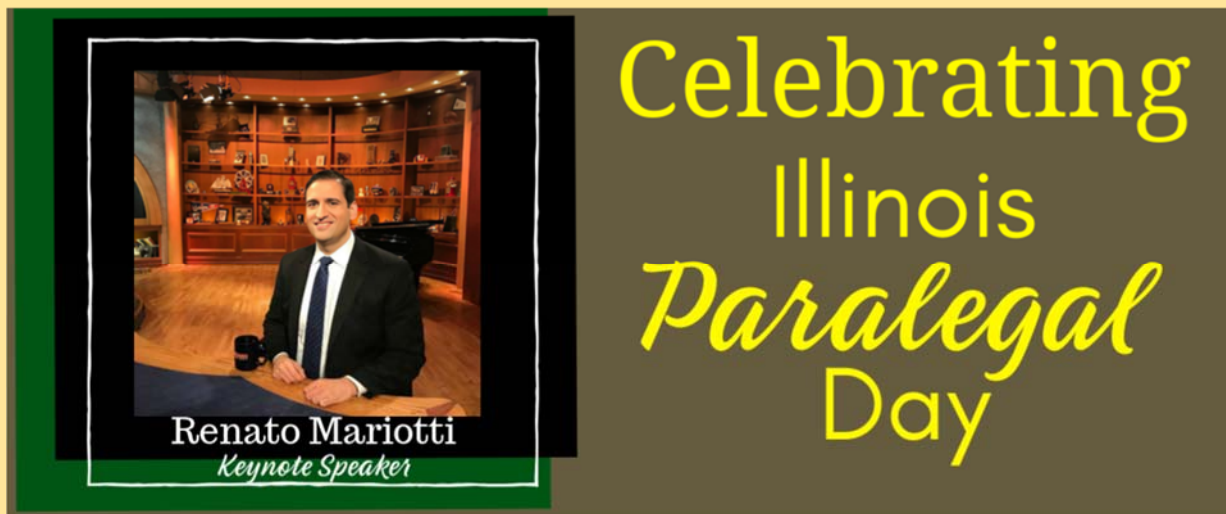
A Workshop on Best Practices for Taking Minutes: Whether you're a Secretary to the Board or have been tasked with taking minutes for a committee or subcommittee, preparing meeting minutes can be a difficult task. Join this workshop to learn the importance and purpose of minute writing, different styles of minutes as well as practical matters and tips. *Michelle Magnaye, Assistant Vice President and Manager, Subsidiary Governance, BMO Financial Group*

GDPR Guidance as it Relates to E-discovery: Obligations arising from the European Union's General Data Protection Regulation (GDPR), are resulting in changes to e-discovery processes and workflows. This advanced technical session will focus on increasing your practical knowledge to help lessen the chances you will be caught between conflicting international data production laws. Paralegals can help attorneys think through where the potentially relevant documents are geographically located and who is in control or custody of the data. In this session we will provide practical answers to questions such as how to identify EU citizens and how to produce the information in litigation. Having this valuable guidance will enable you to help your attorneys put together a good workflow. *Debbie Reynolds, Data Privacy Officer, Director, EimerStahl Discovery Solutions, llc*

Prosecuting and Defending White Collar Crime: White collar offenses may not be violent crimes, but they can have a devastating impact on their victims. In this session, we will talk about various white collar crimes, how prosecutors work with paralegals to collect evidence and prove white collar crimes at trial, and how defense attorneys conduct their own investigations and defend white collar cases. *Renato Mariotti, Esq., Thompson Coburn LLP*

New Changes to the ALTA Title Commitment: We will review the beginnings of title insurance, examine the new 2016 ALTA form title commitment, and discuss the impact of these changes on real property transactions. *Jonathan E. Fay, Underwriting Counsel, Near North National Title LLC*

The Bluebook: The Legal Profession's Most Titillating Literary Work: Before there was *50 Shades of Grey*, the most exciting piece of literature that existed on the planet was *The Bluebook*. In an increasingly diverse and rapidly changing legal profession, *The Bluebook* continues to provide the systematic method by which members of the legal profession communicate essential information about the multitude of sources and authorities they rely upon. Come get reacquainted with the definitive guide for legal citation in the United States. *Nick Kourvetaris, Attorney, Allstate Insurance*



In 2018, the IPA celebrates its **46th Anniversary**. To celebrate this momentous occasion, as well as to recognize **Paralegal Day in Illinois**, the IPA presents former Federal Prosecutor and frequent contributor on CNN, MSNBC, Politico and Newsweek **Renato Mariotti**. Mr. Mariotti is an accomplished trial attorney and will be speaking on **What You Should Know About Obstruction of Justice**. Mr. Mariotti will give us insight on the judicial system and explain obstruction of justice.

2:00 pm – 3:15 pm

The Freeze, Squeeze and Burn: Sale of Interests to an Intentionally Defective Grantor Trust (IDGT) and the Crossroads of Corporate and Trust and Estate Planning: Why are we freezing, squeezing and burning interests? Have you ever wondered why certain membership interests or stock interests are sold vs. gifted? Likewise, has it ever crossed your mind about the tax implications or principals behind why assets or interests are transferred from an individual to a revocable vs. irrevocable trust? As you may already know, the gift and sale of assets and interests can be a complicated process. Join the discussion to better understand a basic overview of gift and estate taxation principals, principals of discounting interests of entities and how this all relates back to your role as a paralegal for transferring and assigning assets and interests. No prior knowledge required! *Louis A. Laski, Esq., Benjamin Lavin, Esq. and Ryan S. Mills, Esq., Katten Muchin Rosenman LLP*

Ethical Considerations for the Use of Cloud Computing: Legal technology is moving towards shared resources – no longer do you need your own hardware and software in a closet in your office space. Instead, infrastructure and software are maintained by large, specialized entities that allow you to use as much or as little as needed. Pay only for what you use - just like your water supply. In this session we will discuss the benefits of cloud technology, how a lawyer can comply with their ethical duty of protecting client data in the cloud, and the lawyer's ethical duty to take reasonable efforts to ensure that any paralegals they employ conduct themselves in a manner that is compatible with the lawyer's professional obligations. *Chiara Vega, Regional Sales Manager, Midwest Region, DISCO*

What You Need to Know About IP Assets: Having an understanding of intellectual property assets and how to commercialize them is essential for any business or organization. Many of the products, technologies, creative works and brands that a company may develop can be protected by one of the four types of intellectual property (copyright, trademark, patent and trade secret). Whether you are interested in reusing content from others or protecting your own content, it is critical to know which type of IP asset is in play and to understand how rights are granted, the scope of protection available and how long can it last. Let's spend an interactive hour discussing our most frequently asked questions about P © TM ®. *Sanjana Sharma, Associate General Counsel, UL LLC*

Beyond Google: 25 Tips in 75 Minutes: Come refresh your online research skills by learning about some new Internet search tools, tips and techniques. We will cover topics including business intelligence tools, free journal databases, specialty search tools, fact check websites, cybersecurity and privacy, and recent trends in the online legal research industry. We will also review some of the best alternative Internet search engines and explore ways to get the most out of Google. *Matthew Bird, Senior Research Librarian, Drinker Biddle & Reath*

Becoming More Efficient in Your Legal Research: Want to become more efficient and confident in your legal research, saving yourself time and your client money? This seminar will focus on becoming more proficient in crafting your research

queries, using both Boolean terms & connectors, as well as plain language searching, so you are confident that you are receiving the most relevant results. There will be a demonstration on how to create alerts so that you can keep updated on the most recent legislation and case opinions that are important to you. Finally, you will learn how to organize and evaluate your research using the workflow tools provided on Westlaw. *Paul R. Lillie, Esq., Client Representative – Strategic Accounts, Thomson Reuters Westlaw*

3:45 pm – 5:00 pm

The 2018 Delaware Update: Learn about the key trends and recent legislative updates in the nation's most popular state to incorporate. In addition, attendees will have the opportunity to hear about pending and future legislation, as well as gain insight into changes in franchise taxes and annual reports. Topics covered include: Overview of 2018 in Delaware, Changes to Annual Report Requirements, House Bill 267, Expedited Services, Global Filing Service Option, Future Staged Filings, Exempt Entities, 2018 Legislative Changes, Form Updates, and Recent Developments in Franchise Tax. *Alan Stachura, Senior Manager of Government Relations, CT Corporation*

E-discovery, Documentation, Legal Holds, and Preserving Evidence: Welcome to the World of E-discovery...it all began with computers and lawyers, now it's an industry. Electronic discovery (eDiscovery) is traced, held, and searched with the intent of using it as evidence in a court case. E-discovery can be gathered from a specific computer or it can be done in a network setting or even from social media. No longer are we limited to paper copies in desk drawers. In this session we will discuss documentation "do's" and "don'ts", provide an overview of the e-discovery process, and what is involved in preserving evidence for a legal hold. Why and when is a legal hold issued? Where do you need to search? Who is subject to a legal hold? How do you determine if a document is relevant? All these questions and more will be pondered. *Anne Reader, Senior Counsel and Charles Rego, Associate General Counsel, UL LLC*

IP Jeopardy! - Most Common Forms of Intellectual Property: Clients need to emphasize anything that distinguishes them from their competitors. Creativity is at the heart of these distinguishing features. Distinguishing features can encompass new inventions, content, branding and information that is known only to the client. The components of creativity are protected by various forms of intellectual property (IP) law. We best serve the client if we recognize the issues even before the client does. In this unique session, following the format of the game show *Jeopardy!*, attendees will be able to participate in learning about the most common forms of IP, including patents, copyrights, trademarks, trade secrets, the Right of Publicity and Internet Law. *Beverly A. Berneman, Partner, Golan Christie Taglia LLP*

E-Filing Training for Illinois Courts With a Focus on Cook County and re:SearchIL: You must now e-file all court documents in civil cases in all Illinois circuits. In this intermediate session, we will provide training on how to e-file, provide answers to frequently asked questions and frequently rejected reasons, and troubleshoot some common issues specific to Cook County. We will also review the unified portal called re:SearchIL, which will provide remote access to electronic court records and documents that spans all courts – statewide. *Tisha Delgado, Litigation Paralegal/E-Discovery Specialist, Golan Christie Taglia LLP*

Let's Talk About Legal Writing: It is what we do. Take this opportunity to learn or review skills to become a better writer. This ambitious session will discuss the different types of legal writing a paralegal is called upon to perform. We will discuss how to focus and improve writing skills to be analytic and persuasive (and grammatically correct). *Caren Mansfield, Paralegal, Baker, Baker & Krajewski LLC*



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

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.

REGISTRATION FORM
The Palmer House Hilton
17 East Monroe Street, 3rd Floor, Chicago, Illinois

Please consider the environment and assist the IPA in going green by registering online at 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/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). Self parking is available at the parking garage partner facility located at 55 East Monroe Street, directly across the street from the Palmer House Hilton. The garage can be accessed from either Monroe Street (East bound traffic) or Adams Street (West bound traffic). Parking tickets can be validated by IPA for a day rate of \$22. Valet Parking is available at the Palmer House Hilton 24 hours a day curbside at both the Monroe Street and Wabash Avenue entrance. Valet parking tickets can be validated by IPA for a day rate of \$32.

Hotel Rooms: A limited number of hotel rooms have been blocked at the Palmer House Hilton for the evenings of November 6th and 7th at a rate of \$229 plus taxes. To book a room, go to <https://aws.passkey.com/go/ILParalegalAssociation>, Group code "IPA". All rooms must be booked prior to October 16th at 5:00 pm.

Registration Information: Mailed registration forms must be postmarked on or before November 2, 2018 to avoid paying the Late Registration rate. Beginning November 3, 2018, Late Registration rates apply. Registration fee includes attendance, handout materials, and breaks. Lunch is included for those registrants attending a full day of seminars

Cancellations and Substitutions: A full refund is available upon receipt of written request received by November 2, 2018. Substitution of registrants is permitted.

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: _____

___ Please check if you require special accommodations and/or diet restrictions. Please describe your requirements: _____

___ 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.)

SEMINAR REGISTRATION FORM <i>Please Check or Circle the Educational Seminars You Will Attend</i> Wednesday, November 7, 2018			
9:00 a.m. – 10:15 a.m.	10:45 a.m. – 12:00 p.m.	2:00 p.m. – 3:15 p.m.	3:45 p.m. – 5:00 p.m.
Intro to Business Entity Tax Elections	A Workshop on Best Practices for Taking Minutes	The Freeze, Squeeze and Burn: Sale to an Intentionally Defective Grantor Trust (IDGT)...	The 2018 Delaware Update
Mobile Discovery – Outsmarting the Smartphone	GDPR Guidance as it Relates to E-discovery	Ethical Considerations for the Use of Cloud Computing	E-discovery, Documentation, Legal Holds, and Preserving Evidence
Hospitality and Alcohol Beverage Law and Licensing	Prosecuting and Defending White Collar Crime	What You Need to Know About IP Assets	IP Jeopardy! – Most Common Forms of Intellectual Property
How to Protect Your Clients at Closing	New Changes to the ALTA Title Commitment	Beyond Google: 25 Tips in 75 Minutes	E-Filing Training for Illinois Courts With a Focus on Cook County and re:SearchIL
Paralegal Ethics, Rules & Guidelines – Follow Your Moral Compass	<i>The Bluebook</i> : The Legal Profession's Most Titillating Literary Work	Becoming More Efficient in Your Legal Research	Let's Talk About Legal Writing

IPA MEMBER REGISTRATION FEES

● FULL DAY (4 sessions)

- ☐ \$250 IPA Member Registration (Lunch Included)
(Postmarked on or before November 2, 2018) ***BEST VALUE***
☐ \$275 IPA Member beginning November 3, 2018 and On-Site (Lunch and Evening Festivities Included)

● HALF DAY (2 sessions)

- ☐ \$150 IPA Member Registration
(Postmarked on or before November 2, 2018)
☐ \$175 IPA Member beginning November 3, 2018 and Day of Event Registrations
☐ Add \$42.50 if attending the Lunch

● QUARTER DAY (1 session)

- ☐ \$75 IPA Member Registration
(Postmarked on or before November 2, 2018)
☐ Add \$42.50 if attending the Lunch
☐ \$100 IPA Member beginning November 3, 2018 and Day of Event Registrations
☐ Add \$42.50 if attending the Lunch

NON-MEMBER REGISTRATION FEES

● FULL DAY (4 sessions)

- ☐ \$300 Non-Member Registration (Lunch Included)
(Postmarked on or before November 2, 2018) ***GREAT VALUE***
☐ \$350 Non-Member beginning November 3, 2018 and On-Site (Lunch and Evening Festivities Included)

● HALF DAY (2 sessions)

- ☐ \$175 Non-Member Registration
(Postmarked on or before November 2, 2018)
☐ Add \$47.50 if attending the Lunch
☐ \$200 Non-Member beginning November 3, 2018 and Day of Event Registrations
☐ Add \$47.50 if attending the Lunch

● QUARTER DAY (1 session)

- ☐ \$100 Non-Member Registration
(Postmarked on or before November 2, 2018)
☐ Add \$47.50 if attending the Lunch
☐ \$125 Non-Member beginning November 3, 2018 and Day of Event Registrations
☐ Add \$47.50 if attending the Lunch

LUNCH (12:00 pm – 2:00 pm)

Please note the extended time for lunch

LUNCH SELECTION - If you are attending the lunch, please select an entrée below. Lunch is included with a Full Day registration.

- ☐ \$42.50 IPA Member, attending Lunch only ☐ \$47.50 Non-Member, attending Lunch only
- ☐ Grilled Chicken Cobb Salad with tomato, bacon, avocado, hard-boiled eggs, and pico de gallo
- ☐ Beef Tenderloin Salad with tomato, cucumber, bleu cheese, lean beef tenderloin, and grilled cipolini onions
- ☐ Roasted Tomato Vegetable Ratatouille in a half acorn squash over a bed of ancient grains

PAYMENT

If paying by check, please copy and mail all three pages to: IPA, PO Box 452, New Lenox, IL 60451-0452

If paying by credit card, please scan and email all three pages to IPA@ipaonline.org

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.



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

___ CREDIT CARD. 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 _____

