



IPA'S Spring Education Conference

The Impact of Artificial Intelligence on Litigation for Paralegals

Monday, April 8th **11:00 AM**

DOUG KAMINSKI
CHIEF STRATEGY OFFICER
PURPOSE LEGAL

The Impact of Artificial Intelligence on Litigation for Paralegals: The Impact of Artificial Intelligence on Litigation for Paralegals: In the legal industry, artificial intelligence is now in the news and in our conversations daily. But what IS artificial intelligence? What are the pros and cons? More importantly, how will it be applied to litigation? Join us for this timely webinar to learn:

- What is AI and what isn't it?
- Will I be replaced by AI?
- How will AI be applied to litigation workflows in the legal profession?
- How can I learn more and use AI to make a difference?

Doug joined Purpose Legal (fka Cobra Legal Solutions) with over 20 years of experience in the legal industry spanning four continents. Mr. Kaminski specializes in helping organizations of all types and sizes understand and implement better processes along with technologies to simplify complex legal workflows.

A frequent speaker and published author, Mr. Kaminski brings deep experience in the legal technology and services industry, having held leadership positions at Relativity, Symantec, Clearwell Systems, and Huron Consulting Group (now Consilio).

Doug is a member of the Chicago Bar Association, the Detroit Bar Association, on the Global Advisory Council for the Electronic Discovery Reference Model, the IGRM Revision Committee, and a Fellow of the Claims & Litigation Management Alliance. Now that the lockdown is over, Doug is back to living on airplanes.

IPA'S Spring Education Conference


Beneficial Ownership Information Reporting Under the Corporate Transparency Act: What You Need to Know

Monday, April 8th **1:00 PM**

PIA ANGELIKIS, ESQ.
VICE PRESIDENT OF GOVERNMENT
RELATIONS AND LEGAL RESEARCH
COGENCY GLOBAL INC.

Beneficial Ownership Information Reporting Under the Corporate Transparency Act: What You Need to Know: Effective January 1, 2024, the groundbreaking Corporate Transparency Act (the CTA) requires all "reporting companies" to file a Beneficial Ownership Information (BOI) Report with FinCEN (a division of the US Department of Treasury). This webinar covers key definitions in the CTA, who must file, the contents of the BOI report, the 23 exemptions to the reporting requirement, the very important question: are you a "company applicant?", who has access to the database, penalties for non-compliance, and how to prepare your firm and your clients for the CTA. During the hour, we will also cover the newest updates from FinCEN on all of these matters.


*Pia Angelikis, Esq., is the Vice President of Government Relations and Legal Research at Cogency Global Inc.. She has over 25 years of experience with premiere service companies in the UCC and corporate services industry, managing large teams of expert lawyers and paralegals conducting legal research for public filing requirements for multistate mergers, conversions and acquisitions, tracking and analyzing UCC Article 9 and business entity legislation in all 50 states and the District of Columbia, and providing thought leadership. Prior to her career in the UCC and corporate services industry, Ms. Angelikis litigated for 5 years in the areas of insurance defense and employment law. She wrote the winning brief resulting in the 9th Circuit published opinion, *In re Complaint of Ross Island Sand & Gravel*, 226 F.3d 1015 (9th Cir. 2000). Ms. Angelikis holds a JD from the University of California, Hastings College of the Law and is licensed to practice law in California.*



**IPA'S Spring
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**Microsoft Excel
PivotTables and
PivotCharts**

Tuesday, April 9th 11:00 AM



**DR. KRISTINE
CONDON**

Microsoft Excel PivotTables and PivotCharts: Take a large pool of data and summarize it quickly, efficiently, and correctly with PivotTables! Learn tips, tricks, and techniques for developing quick pivot summaries and converting them to attention-getting charts that you can include in presentations and reports. We'll cover designs and features that are found across all versions of Microsoft Excel.

Dr. Kristine Condon retired in 2020 as the program director of Kankakee Community College's ABA-approved Paralegal Program. Kris began her paralegal career in service to the First District Justices of the Illinois Supreme Court as they launched their paperless, technology-based Chicago satellite Office of the Clerk in 1986. She later served as the Computer Literacy Coordinator in the Roosevelt University Paralegal Program and joined South Suburban College's paralegal adjunct faculty while working full-time on her master's degree, later serving as Interim Program Coordinator while working full-time as a computer trainer at a Top Ten law firm. After four years on the senior training staff at the American Medical Association, she joined KCC in 1998 and spent the last 22 years of her career there. As the college's corporate trainer, she designed customized computer training coursework for the 50 largest employers in Kankakee County and implemented a Microsoft Office Specialist Testing Center on campus.

Kris graduated with a Bachelor of Arts, magna cum laude, from Illinois Wesleyan University in Bloomington; a paralegal certificate with honors from Roosevelt University; a Master of Education from Loyola University of Chicago; and a Doctor of Education in community college leadership from National Louis University. She also holds Microsoft Office Specialist certifications in Word, Excel, Access, PowerPoint, and Outlook is a Microsoft Certified Educator.



**IPA'S Spring
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**The Road
to Trial**

Tuesday, April 9th 1:00 PM



CAREN MANSFIELD
PARALEGAL
BAKER, BAKER & KRAJEWSKI LLC

The Road to Trial: The Road to Trial can have many roadblocks. Summary judgment disposes of many cases. It has been years, where are the witnesses? Getting ready for trial begins not in the days before it is scheduled but even before the complaint is filed. Join me to talk about how you can assist the attorneys in getting the case to trial. We will talk about interviewing witnesses, ethics, discovery, depositions, drafting subpoenas, preparing exhibits, do you need a trial binder (paper or electronic),

and more. We are going to move fast in this presentation so get your seatbelts ready!


Caren Mansfield has been employed as a paralegal since 1987 by the same firm. She is employed by the law offices of Baker, Baker & Krajewski LLC in Springfield, Illinois and specializes in labor and employment law litigation. She is a graduate of the American Institute for Paralegal Studies and obtained the credential of Certified Legal Assistant (now Certified Paralegal) in 1996. She has been a member of the Illinois Paralegal Association since 1988 and served on its Board of Directors as president, vice president, secretary and treasurer. The year she was President the IPA saw its highest membership. She has participated as a speaker at the IPA's Education Seminars, at an NFPA Education Seminar, Legal Up seminars and in other public settings on topics ranging from Discovery, Ethics, Federal Rules of Civil Procedure, Filing a Charge of Discrimination through Trial, Law Office Administration and more. She is on the NFPA Ethics Board. For 17 years she submitted articles regarding paralegals several times a month to the Chicago Daily Law Bulletin's Legal Employment Weekly. She serves as a mentor to paralegals.



**IPA'S Spring
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**The 21st Edition of
The Bluebook –
The Essentials**

Wednesday, April 10th 11:00 AM



CELIA ELWELL, RP
PARALEGAL

The 21st Edition of The Bluebook – The Essentials: This seminar will cover federal and state citations, citations to electronic research sources, and the most recent changes to citation format from the 21st Edition of the Bluebook. It will include a Bluebook Cheat Sheet for handy reference as well as a worksheet for your own use to sharpen your knowledge of basic citation form.

Celia C. Elwell, RP, an Oklahoma paralegal, has worked in multiple areas of law since 1984. She has taught multiple seminars in Illinois for IPA, in Oklahoma for its state legal organizations, and around the country for NFPA. Celia taught paralegal courses for 15 years at the ABA-approved program at the University of Oklahoma Dept. of Legal Assistant Education. Celia co-authored the textbook and teacher's manual for Practical Legal Writing for Legal Assistants, among her other publications.



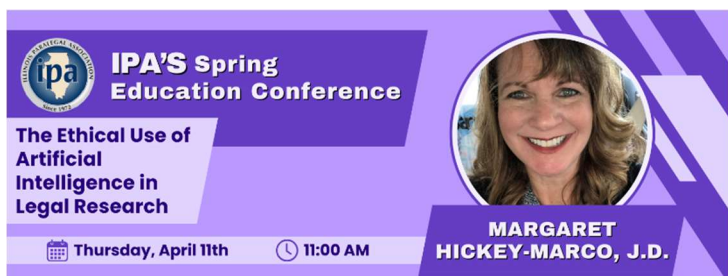
An Overview of the Risks of Artificial Intelligence:

Artificial Intelligence is in absolutely everything these days. With the promise of unrivalled benefits, it's important to also understand the external risks associated with Artificial Intelligence and how to avoid them. We'll discuss the litigation, compliance and other rapidly developing trends and other external risks associated with the use Artificial Intelligence and how to avoid or reduce that risk.

Peter Berk is a skilled advisor, assisting clients to prevent, prepare for, and deal with legal issues and litigation that arise in connection with the use of new and ever changing technology, including Artificial Intelligence.

Peter helps clients navigate the uncertain and turbulent waters of the online, electronic, and technology world. He counsels clients on ways to protect themselves from the ever-present threats in the online jungle through appropriate policies and procedures. Peter steers clients through the potential minefield following internet and technology-related incidents including social media emergencies and data breach catastrophes. When the unthinkable happens, Peter coordinates the client's response to address the issues quickly, limit risk, and handle any necessary litigation.

Richard Halm guides clients in preparing for, responding to, recovering, and learning from cybersecurity and privacy incidents. With a passion for information security, he also advises businesses on the benefits, risks, and necessary governance structures of new technologies such as Artificial Intelligence. He leverages his breadth of cybersecurity knowledge to negotiate contractual provisions related to cybersecurity and advise clients during regulatory investigations. As a US Army veteran, he blends this vantage point with an ability to bring order and calm to complex and high-stress incidents.



The Ethical Use of Artificial Intelligence in Legal

Research: Artificial Intelligence is here to stay. As legal professionals, we need to learn how to use this tool effectively while fulfilling our ethical duties to our clients. This presentation will discuss available AI tools for legal professionals, the strengths and weaknesses of these tools, and compliance with applicable ethical rules.

Ms. Hickey-Marco has been an Adjunct Instructor at William Rainey Harper College Legal Studies Department since 2011. She has taught all the legal research courses at Harper: Fundamentals of Legal Research, Computer Assisted Legal Research, and Legal Research and Writing. She attended New York University where she earned her undergraduate degree in Political Science. She received her J.D. from Cornell Law School. After law school, she practiced Product Liability defense litigation at a Chicago law firm and then went on to work as a legal research consultant for LexisNexis. In addition to teaching, she currently works as a Paralegal/Office Manager at the Labor law firm Marco, McGuire & Arreola in Oakbrook Terrace, Illinois.



Prudent Paralegal Prep: 100 Days Before Trial: In this one-hour seminar, we will take a walk through Tinsel Town as we begin preparing for the red carpet premier (trial). The prudent litigation paralegal begins preparing for premier night at case inception. The heavy lifting begins about 4 months prior to the start of the trial. In this webinar, we will cover:

- The Storyboard: War Room, Trial Notebooks, Witness List, Exhibit List, Scheduling Order, Tech, Courtroom Needs
- The Classics: Jury Instructions, Motions in Limine, Subpoenas, Motion for Directed Verdict (for Defendants)
- The Audience: Preparing for Voir Dire, Demonstratives, Electronic and Paper Exhibits
- Orchestra Pit: Appearances matter! How to ensure all the boxes, equipment, clients, witnesses, and appearances fit the venue and jurors.
- Production: Planning logistical details - meals, transportation, expense tracking, tech, inspect the courtroom
- Opening Day: Tips for the start of the trial

Mandy Chapman is employed as a litigation paralegal at Wolff & Wolff Trial Lawyers in St. Louis. She primarily works on medical malpractice plaintiff's cases. Prior to joining Wolff & Wolff, Mandy worked on health law, class action, municipal law, business litigation, eDiscovery, and personal injury (plaintiff and defense) matters. Mandy holds a bachelor's degree in both Education and History from Missouri Valley College (magna cum laude) and a paralegal certificate from Adams State College (with honors).

In 2011, she earned the Registered Paralegal (RP) designation through NFPA. In 2014, she was honored by the St. Louis Paralegal Association, receiving the Paralegal Legend award. In 2018, Mandy obtained both a certification in Legal Project Management and advanced certification as an LPM Coach. As an LPM Coach, she works with practice groups to educate and implement project management skills, designed to increase efficiencies, assist with process improvement, and evaluate strategic pricing data.

Mandy is currently serving as a Board Advisor to the Missouri Paralegal Association, sits on the Paralegal Committee for the Missouri Bar Association, and is on the Advisory Committee for the paralegal education program at American National University. She has previously held several leadership positions with the Missouri Bar Association's Paralegal Committee, the Missouri Paralegal Association, and the St. Louis Paralegal Association. She continues to serve as a paralegal mentor to students and junior paralegals. Mandy has published professional articles in the legal industry and regularly presents CLEs on myriad topics. In her spare time, Mandy enjoys family time, kayaking, building a cabin in the woods, helping with dog rescues, and cheering for Cardinals baseball and Packers football teams.



The banner is purple and white. On the left, it says "IPA'S Spring Education Conference" with the IPA logo. Below that, it says "Workplace Communications Since COVID". At the bottom left, it says "Friday, April 12th" and "11:00 AM". On the right, there is a circular portrait of Matthew Bird, a man in a suit, with his name "MATTHEW BIRD" written below it.

Workplace Communication Since COVID: The 2020 COVID outbreak dramatically changed how we work, communicate, and collaborate. In the new normal of remote and hybrid work, even if we are in the office for part of each week, our schedules may differ from those of our colleagues. As a result, many workplace interactions today are either asynchronous (not real time) via tools like e-mail, instant messaging, and Slack, or real time but

virtual using videoconferencing tools like Teams, Webex, and Zoom. During this session we will review some of the key tools now being used for workplace communication and collaboration and discuss their advantages and drawbacks. We will also consider the challenges companies face today in onboarding and mentoring new employees, retaining and developing experienced workers, and promoting effective collaboration in remote and hybrid workplaces.

Matthew Bird is a former law librarian and research manager specializing in litigation support and researching companies, people, and products. He has a PhD in International Politics from the University of Wales, and a Master's in Library Science from the University of Michigan. During a 30-year career at AmLaw100 firms in Washington, D.C. and Chicago, he worked with attorneys in a dozen practice areas and taught online research skills to attorneys and legal staff. Matt has presented regularly on Internet search tools and online research skills to law firm audiences and outside groups like IPA. He has also taught history and literature courses at the Newberry Library, tutored high school students preparing for the ACT and SAT at Academic Approach, and taught motorcycle safety courses for the State of Illinois.



Empower Your Legal Team: Mastering Digital Evidence Collection as a Paralegal: In this course, we will delve into the fundamental principles and practical techniques necessary for success in collecting evidence in the digital age of litigation. The course will cover a wide range of topics, including understanding the types of digital evidence, navigating legal regulations and ethics surrounding digital data, techniques for preserving and collecting electronic evidence, practical methods for data

analysis and documentation, and the utilization of eDiscovery tools and technologies.

Dr. Billings is a managing legal technology consultant at Sidley Austin LLP, where he leads a team of legal consultants, product managers, patent agents, and practice support professionals. He has over 20 years of experience providing innovative solutions and strategic guidance to clients and internal stakeholders on complex legal and business challenges, such as e-discovery, data privacy, cyber security, and digital transformation. As a doctoral graduate in Technology Entrepreneurship, Dr. Billings combines technical expertise, legal insight, and business acumen to drive innovation and efficiency in the legal services ecosystem. He has published and presented on topics such as disruptive technology, artificial intelligence, machine learning, and cloud computing. He is also a board member for two big-data certificate programs from the California State University System.