



Paralegal Conference 2008

Network and sharpen your skills

8 panels & workshops

- Probate and Fiduciary Accounting Workshop
- Practical Ethics
- Advanced Litigation Workshop—
The Paralegal's Role During Trial
- Intellectual Property Overview—
Today and Tomorrow
- Technology and the Paralegal
- How to Conduct an Investigation
- The Nuts and Bolts of MCAD Practice
- Career Options for Paralegals

Why attend?

MCLE is proud to present the tenth annual *Paralegal Conference 2008*. Led by a faculty of some of the most distinguished paralegals and attorneys in Massachusetts, the *Conference* gives you the opportunity to hone your skills in both transactional and trial practice and to be happier in your career by learning more about your career options. The *Conference* includes a keynote presentation on regulation and the future of the paralegal profession, presented by Tracey L. Young, RP, Region V Director of the National Federation of Paralegal Associations (NFPA).

Eight workshops throughout the day cover a wide variety of relevant topics for paralegals from every practice area. Whether your focus is intellectual property, employment law, litigation, or probate and fiduciary accounting, there are breakouts designed to meet your needs. Learn how to conduct investigations for litigation, corporate, and family law practices. During the day, you can choose a panel that address the ethical issues confronting senior paralegals every day in their careers or hear other senior paralegals discuss career options that are rewarding and offer personal growth and job satisfaction.

Faculty

Nancy A. Cominoli, Cochair, *Bulkley, Richardson & Gelinis LLP, Springfield*; Susan C. Dussault, Cochair, *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*; Shawna J. Hansen, Cochair, *Morrison Mahoney LLP, Boston*; Christa A. Arcos, Esq., *Massachusetts Appeals Court*; Clyde D. Bergstresser, Esq., *Campbell Campbell Edwards & Conroy, PC, Charlestown*; Patricia E. Bridgeo, *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*; Tracy A. Craig, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*; Chip Fiermonte, *Robert Half Legal, Boston*; Jennifer Fogelson, *Esquire Litigation Solutions, Boston*; Lori A. Jodooin, Esq., *Rodgers, Powers & Schwartz LLP, Boston*; Peter C. Lando, Esq., *Lowrie, Lando & Anastasi LLP, Cambridge*; Wayne Martin, *National Video Reporters,*

Boston; Susan P. Mitchell, *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*; Lori M. Pandisco, *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*; Kevin Pelletier, *Massachusetts Materials Research Inc., West Boylston*; Lynne Marie Reveliotis, *Massachusetts Board of Bar Overseers, Boston*; Karen M. Riley, *Campbell Campbell Edwards & Conroy, PC, Charlestown*; Nancy Roney, *Lynn*; Kimberly A. Rozak, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*; David Smith, *Metro Meeting Centers, Boston*; DeBorah Sonnenschein, *South Middlesex Legal Services, Inc., Framingham*; Catherine Thornton, *Tentindo, Kendall, Canniff & Keefe LLP, Charlestown*; Lynn S. Turgeon, *Goodwin Procter LLP, Boston*; Joan O. Vorster, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*; Daniel C. Wandell, *Office of the Secretary of State, Corporations Division, Boston*; Erica Weissfield, *Robert Half Legal, Boston*; Lisa R. Witham, *Lowrie, Lando & Anastasi LLP, Cambridge*; Tracy L. Young, RP, *E. Stewart Jones Law Firm, Troy, NY*

DATE AND LOCATION

Tuesday, June 24, 2008
9:30 a.m. – 4:30 p.m.
MCLE Conference Center,
Ten Winter Place, via Winter Street,
Boston

PROGRAM NO. 2080245P01

KEYNOTE SPEAKER

Tracey L. Young, RP, on Regulation and the Future of the Paralegal

Regulation of the paralegal profession has been discussed and debated for more than a decade. It is an issue presently facing paralegals in many states across the country. Tracey L. Young, Region V Director of the NFPA, reviews and explains various forms of regulation, as well as the current status of regulation across the country. Ms. Young is a litigation paralegal for the E. Stewart Jones Law Firm in Troy, New York, and practices in the areas of plaintiff's personal injury and medical malpractice. With twenty-five years of experience, she has worked in a variety of areas of law, including family law, real estate, collections, probate, personal injury, and civil litigation. Ms. Young earned her BA in sociology magna cum laude from the University of Virginia, where she was also a member of the Phi Beta Kappa Society. She has an MS in urban planning from Columbia University and a paralegal certificate from the American Institute of Paralegal Studies. She has been a PACE registered paralegal since 2000, and serves on the Board of the National Federation of Paralegal Associations. She is a strong advocate of regulation of the paralegal profession.

6 Substantive Credits

TUITION includes written materials

- ▶ MCLE Sponsor Members \$165
- ▶ CMPA/MPA/WMPA Members . . . \$175
- ▶ All Others \$195

CAN'T ATTEND?

-  Written Materials
 - ▷ MCLE Sponsor Member . . . \$110
 - ▷ Nonmember \$125
-  CD
 - ▷ MCLE Sponsor Member . . . \$155
 - ▷ Nonmember \$175

CONFERENCE SCHEDULE, TUESDAY, JUNE 24, 2008

9:30 – 9:45 a.m.	<p>Welcome and Introduction</p>	<ul style="list-style-type: none"> ■ Nancy A. Cominoli, Cochair, <i>Bulkley, Richardson & Gelinas LLP, Springfield</i>; Susan C. Dussault, Cochair, <i>Mirick, O'Connell, DeMallie & Lougee LLP, Worcester</i>; Shawna J. Hansen, Cochair, <i>Morrison Mahoney LLP, Boston</i>
9:45 – 11:15 a.m.	<p>Session I (Choose One)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Probate and Fiduciary Accounting Workshop The panel focuses its discussion on how to prepare estate tax returns and schedules (706 filings) and offers practical guidance on the paralegal's role in their preparation. <input type="checkbox"/> Practical Ethics Our experts provide an overview of paralegal ethics, and then address the practical ethical conundrums that paralegals face every working day in this fast-paced, hypothetical-based workshop. <input type="checkbox"/> Advanced Litigation Workshop: The Paralegal's Role During Trial Our panel of attorneys and paralegals explore the role that paralegals play during trial from both the plaintiff and defense perspective, when it comes to jury selection, relationship with witnesses, and the organization and introduction of evidence. 	<ul style="list-style-type: none"> ■ Patricia E. Bridgeo, <i>Mirick, O'Connell, DeMallie & Lougee LLP, Worcester</i>; Tracy A. Craig, Esq., <i>Mirick, O'Connell, DeMallie & Lougee LLP, Worcester</i> ■ Christa A. Arcos, Esq., <i>Massachusetts Appeals Court</i>; Lynne Marie Reveliotis, <i>Massachusetts Board of Bar Overseers, Boston</i> ■ Clyde D. Bergstresser, Esq., <i>Campbell Campbell Edwards & Conroy, PC, Charlestown</i>; Lori M. Pandisco, <i>Mirick, O'Connell, DeMallie & Lougee LLP, Worcester</i>; Karen M. Riley, <i>Campbell Campbell Edwards & Conroy, PC, Charlestown</i>; Joan O. Vorster, Esq., <i>Mirick, O'Connell, DeMallie & Lougee LLP, Worcester</i>
11:15 – 11:30 a.m.	<p>Networking Break</p>	
11:30 a.m. – 12:30 p.m.	<p>Keynote Speaker: Regulation and the Future of the Paralegal</p>	<ul style="list-style-type: none"> ■ Tracy L. Young, RP, <i>E. Stewart Jones Law Firm, Troy, NY</i>
12:30 – 1:30 p.m.	<p>Lunch (on your own)</p>	
1:30 – 3 p.m.	<p>Session II (Choose One)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Intellectual Property Overview—Today and Tomorrow The workshop reviews patents, trademarks, copyrights, and trade secrets. The panel discusses the details of each type of IP, including what is required to obtain and protect these rights. The presentations also address some of the latest trends in each area—court decisions, legislation, and rules. <input type="checkbox"/> Technology and the Paralegal Our panel discusses the latest technological tools that paralegals use to fulfill job responsibilities, from scientific investigation and e-discovery to courtroom video presentations and state government technological resources. Learn about the technical skills that should be on every paralegal's résumé! <input type="checkbox"/> How to Conduct an Investigation Whether your practice is in litigation, corporate, or family law, our experienced investigator offers practical guidance on how to interview clients, and witnesses, and how to track down financial documents. 	<ul style="list-style-type: none"> ■ Peter C. Lando, Esq., <i>Lowrie, Lando & Anastasi LLP, Cambridge</i>; Lisa R. Witham, <i>Lowrie, Lando & Anastasi LLP, Cambridge</i> ■ Chip Fiermonte, <i>Robert Half Legal, Boston</i>; Jennifer Fogelson, <i>Esquire Litigation Solutions, Boston</i>; Wayne Martin, <i>National Video Reporters, Boston</i>; Kevin Pelletier, <i>Massachusetts Materials Research Inc., West Boylston</i>; David Smith, <i>Metro Meeting Centers, Boston</i>; Daniel C. Wandell, <i>Office of the Secretary of State, Corporations Division, Boston</i>; Erica Weissfield, <i>Robert Half Legal, Boston</i> ■ Lynne Marie Reveliotis, <i>Massachusetts Board of Bar Overseers, Boston</i>
3 – 3:15 p.m.	<p>Networking Break</p>	
3:15 – 4:30 p.m.	<p>Session III (Choose One)</p> <ul style="list-style-type: none"> <input type="checkbox"/> The Nuts and Bolts of MCAD Practice The panel of experts discuss the basics of practicing before the MCAD, including filing and answering a complaint, interviewing witnesses, drafting and responding to discovery, and preparation for hearings before the commission. <input type="checkbox"/> Career Options for Paralegals The panel discusses career options available for paralegals, from the requisite experience for their positions, to how to change career paths. 	<ul style="list-style-type: none"> ■ Lori A. Jodoin, Esq., <i>Rodgers, Powers & Schwartz LLP, Boston</i>; Susan P. Mitchell, <i>Mirick, O'Connell, DeMallie & Lougee LLP, Worcester</i>; Kimberly A. Rozak, Esq., <i>Mirick O'Connell DeMallie & Lougee LLP, Worcester</i> ■ Nancy Roney, <i>Lynn</i>; DeBorah Sonnenschein, <i>South Middlesex Legal Services, Inc., Framingham</i>; Catherine Thornton, <i>Tentindo, Kendall, Canniff & Keefe LLP, Charlestown</i>; Lynn S. Turgeon, <i>Goodwin Procter LLP, Boston</i>