

CALIFORNIA ALLIANCE OF PARALEGAL ASSOCIATIONS

23rd Annual Educational Seminar

June 25, 2011

Holiday Inn - Fisherman's Wharf

San Francisco, California





Dear Paralegals, Legal Professionals and Attorneys:

The California Alliance of Paralegal Associations (CAPA) and the Paralegal Association of Santa Clara County (PASCCO) are proud to present CAPA's 23rd Annual Educational Conference in San Francisco, California.

CAPA's educational conference was created to provide quality continuing education for practicing paralegals and legal professionals, as well as to provide an introduction to the legal profession for students. You are cordially invited to participate in one of the most prestigious educational conferences in California - offering MCLE, CLA and PACE continuing legal education credit for all courses.

PROGRAM

7:30 a.m. – 8:30 a.m. Registration, Breakfast and Meet the Exhibitors

8:40 a.m. – 8:50 a.m. Welcome and Introductions

MORNING SESSIONS PART I:

9:00 a.m. – 10:00 a.m.

TRACK 1: Adobe for the Law Professional

Pam Wolpa, RP

TRACK 2: Corporate Changes

Tara Ho, Parasec

TRACK 3: Resume 101 (non-MCLE presentation)

Karen Whitaker, LegalEase LLC

MORNING BREAK

10:00 a.m. – 10:30 a.m. – Morning Break and Visit with Exhibitors

MORNING SESSIONS PART II:

10:30 a.m. – 11:30 a.m.

TRACK 1: Calendaring Risks

Joseph C. Scott, Deadlines on Demand

TRACK 2: Social Security and Disability

Melvin E. Irvin, CP

TRACK 3: Writing Tips and Tricks (non-MCLE presentation)

Jill Meryl Levy, Firebelle Productions

LUNCHEON

11:30 a.m. – 1:00 p.m.

Lunch, Keynote Address and Exhibitor Drawings

Domestic Partnerships: *Deborah Perkins, Esq.*

AFTERNOON SESSIONS

1:15 p.m. – 2:15 p.m.

TRACK 1: Excel Tips and Tricks

Sheri Webb

TRACK 2: Trademarks

Cindy Tung, Thomson Reuters

TRACK 3: Certification Panel (non-MCLE presentation)

NALA, NfPA, CACPS

2:30 p.m. – 3:30 p.m.

TRACK 1: eDiscovery

John Kelly, Blackstone Discovery

TRACK 2: Immigration Law

Bobby Rimas

TRACK 3: B&P Code 6450 (Ethics MCLE)

Carolyn Davis, ACP

AFTERNOON BREAK

3:30 p.m. – 3:45 p.m. – Afternoon Break and Visit with Exhibitors

ETHICS SESSION

3:45 p.m. – 4:45 p.m.

Ethics: CAPA Goes to the Movies

Stacey Hunt, CLA, CAS

RECEPTION AND RAFFLE

5:00 p.m. – 6:00 p.m.

Reception and Member Association Raffle



Joint Sessions

California Domestic Partners

Deborah Perkins, Esq.

This session will provide an overview of domestic partnerships, including how to create a domestic partnership, what rights are associated with domestic partnerships, what public benefits are offered for domestic partnerships. Ms. Perkins will also cover estate planning for partners, rights upon termination of domestic partnerships, and where the California domestic partners law conflicts with federal law.

Ms. Perkins graduated cum laude with a juris doctor degree from Pepperdine University School of Law in 2005. While at Pepperdine, she gained valuable tax law experience through an internship with the Internal Revenue Service Estate & Gift Tax Division. Upon graduation, Ms. Perkins was admitted to the Florida State Bar and became an associate with a Florida firm practicing transactional real estate law and estate planning. In 2006, she relocated to Ventura County and has since been admitted to the California State Bar. The focus of Ms. Perkins' practice is family law, encompassing issues such as divorce, child custody, child/spousal support, and pre/post-marital agreements. Ms. Perkins also has a bachelor of science degree in hotel administration from the University of Nevada, Las Vegas, where she graduated magna cum laude in 2001. She is a member of the Ventura County Bar Association and the Ventura County Family Law Bar Association.

Ethics: CAPA Goes to the Movies

Stacey Hunt, CLA, CAS

Courtroom dramas are always popular films with the American public. They can also be highly instructive, either on purpose or inadvertently, on ethical behavior for attorneys and non-attorneys. Join us for a fun trip through Hollywood and the Rules of Professional Conduct.

Stacey Hunt, CLA, CAS, is a graduate of the Fresno City College paralegal program and a litigation paralegal with Duggan Smith & Heath, LLP in San Luis Obispo, California. She is the co-author of three books, including Evidence Management for the Paralegal (Cengage, 2007). Ms. Hunt taught legal writing and ethics for the Paralegal Studies Program at California Polytechnic State University, San Luis Obispo, and is a member of the Ethics Roundtable panel for Paralegal Today magazine. She is a past-president of the California Alliance of Paralegal Associations and is currently president of the Central Coast Paralegal Association. Ms. Hunt is a contributor to an online course on discovery for the Commission for Advanced California Paralegal Specialization.



TRACK #1

Adobe for the Law Professional

Presented by Pam Wolpa, RP

Learn some shortcuts and tricks on how to be more productive and efficient with one of the hottest software programs used by law firms and legal departments.

Pam Wolpa has been working as a paralegal in law offices for sixteen years. Ms. Wolpa is a PACE Registered Paralegal. She currently works as a paralegal in the San Francisco office of Littler Mendelson, P.C., the nation's largest employment law firm, where she specializes in litigation. Ms. Wolpa is an instructor at the San Francisco State Paralegal Studies Program where she teaches Computer Applications in Law Practice.

Calendaring Risks

Joseph C. Scott

Attending this seminar will help you better understand and appreciate the need for effective, efficient legal calendaring techniques that you can build into your firm's risk management strategies. Learn how to improve your firm's overall calendaring processes, and thus reduce missed deadlines and miscalculations. This program will focus on the benefits of automated rules-based calendaring technology and services, while satisfying malpractice carrier mandates, and thus reducing your malpractice risk.

Joseph C. Scott is a licensed California attorney with over 20 years of experience working in the legal field. He is the Vice President and General Manager of CompuLaw, the nation's leading provider of rules-based calendaring software used by major law firms nationwide.

Excel tips and Tricks for the Legal Professional

Sheri Webb

This course will provide you with some "tips and tricks" for the efficient utilization of standard-issue technology, so you can achieve the same results that the large firms achieve using high-dollar software packages. Emphasizing on Microsoft Excel, Sheri A. Webb, ACP will share her experience in managing document-intensive cases efficiently. What you learn will help you prepare your attorneys for anything opposing counsel throws at them. You will walk away with some simple formulas to make your life easier, and access to sample spreadsheets and organizational materials that Ms. Webb has found useful in her practice.

Sheri A. Webb is an Advanced Certified Paralegal in compliance with Business & Professions Code 6450. Her background lies in civil litigation, with an emphasis on complex case management and document coordination. Ms. Webb has worked with technology ranging from the most basic of software in small firms, to cutting edge discovery tools in multi-national, high profile firms. Preferring the small firm atmosphere, Ms. Webb has learned to achieve those big firm looks, with a small firm price-tag.

The Ever-Changing Landscape of E-Discovery

John Kelly

Keeping pace with the technology, the costs and the best practices in the digital world.

John P. Kelly is the founder of BlackStone Discovery. He is responsible for the company's strategic direction, overall management and growth. Mr. Kelly works closely with BlackStone Discovery partners and customers to streamline all aspects of the e-discovery and information management process. During his 20-year career working in the legal technology industry, Mr. Kelly has been on the forefront of innovation – creating the first nationwide legal document services firm, and originating the first legal scanning and processing business on the West Coast. Prior to starting BlackStone Discovery, Mr. Kelly held executive positions at Garage Technology Ventures, Netscape Communications, NightRider Overnite Copy Service (IKON Office Solutions), and the law offices of Morrison & Foerster. During Mr. Kelly's career he has been recognized for his success in new company creation, building high energy teams, and in developing and delivering technology for the legal industry.



TRACK #2

Corporate Changes

Tara Ho

This session will provide a discussion of dramatic changes that may impact the corporate legal field – specifically with respect to how entities are formed in the United States. Recent government reports and proposed legislation, in recent years, may impact future corporate and LLC filings on the national level. The seminar will focus on last year's proposed "Stop Tax Haven Abuse" act as well as the recent proposal from the United States Treasury Department that may be introduced as a bill in Congress in 2011 – either of which, if passed, will significantly change how entities are formed. The seminar will offer one credit of continuing legal education credit.

***Tara Ho**, Regional Accounts Manager with Parasec, a public records research/filing firm, spent most of her career in the legal industry (working first as a paralegal, then as a patent agent and, most recently, as in-house IP counsel). Ms. Ho brings an insider's perspective to Parasec and our clients. Ms. Ho's first-hand knowledge of the legal industry helps to ensure that the needs of her clients are met effectively and efficiently. During her free time, she enjoys being outdoors in the sunshine, where she can often be found swimming, hiking and camping.*

Social Security Disability (SSDI) and Supplemental Security Income (SSI) Disability Benefits

Melvin E. Irvin, C.P.

Learn the difference between Social Security Disability Benefits and Supplemental Security Income, and how physical or psychological disability is determined.

***Mel Irvin** is the President of Melvin E. Irvin Disability Representative, Inc, and a disability appeals representative, practicing before the Social Security Administration where he represents claimants applying for Social Security disability benefits. Mel has represented claimants before the Social Security Administration since 1996. In 2007, Mr. Irvin was awarded the prestigious "Advocate of the Year Award" by the San Jose Division of the State of California Department of Rehabilitation. His other personal awards include the 2008-2009 Jean M. Cushman Award presented by the Paralegal Association of Santa Clara County, and the 2009 Affiliates Award presented by the National Association of Legal Assistants. He is also an award-winning public speaker and has presented over 800 workshops, classes and seminars. The year of 2010 marks the second year Mel has served as an appointed member of the San Jose City Disability Awareness Day Committee. Mr. Irvin is very proud to be a U. S. Marine Vietnam veteran.*

Trademarks: Selecting Good Trademarks and Basic Trademark Screening Theory

Cindy Tung

We'll discuss characteristics of a strong trademark, what to avoid and special considerations, and the basic theory behind screening and how to do it.

***Cindy Tung** is a Senior Account Manager with Thomson CompuMark a division of Thomson Reuters. In this role, Ms. Tung manages client relationships in Northern California and the state of Washington by providing exemplary service and support to all Thomson Reuters clients. Ms. Tung has more than 13 years of intellectual property experience in trademarks. Prior to starting her career at Thomson Reuters, Ms. Tung spent 7 years as a paralegal and case assistant.*

Immigration Law: Employment-Based Immigration Petitions and Applications

Bobby Rimas

There are various employment-based immigration petitions and applications that allow U.S. companies to employ highly educated immigrants who provide cutting edge skills within our competitive global market. This seminar will give a brief overview of several employment-based immigration petitions and applications with a focus on the requirements and document preparation of H-1B and TN Petitions. This presentation will also touch on prevailing wage issues, common petitioner obstacles, and implications of non-compliance with H-1B and TN Petitions. There will also be a discussion on the Arizona Law, SB 1070.

***Bobby T. Rimas** is a paralegal specializing in immigration and employment matters for a bank in Pasadena, California. Mr. Rimas is also an Adjunct Faculty Member at West Los Angeles College where he teaches "Introduction to Law" and "Legal Research" courses. He is the Vice President of Membership & Policy for the Los Angeles Paralegal Association (LAPA) where he also serves as the Immigration Law Section Co-Chair and Website Committee Chair. In April 2010, Mr. Rimas was given a certificate of "Congressional Recognition" from a U.S. Congressman for his role in raising scholarship monies in the capacity of Fundraising Director for the University of California, Los Angeles (UCLA) Pilipino Alumni Association. Mr. Rimas is on the advisory boards of the University of La Verne's Legal Studies Department and West Los Angeles College's Paralegal Studies Program. His Bachelor's Degree is from UCLA and his Paralegal Certificate in Litigation/Corporations is from the UCLA Extension Attorney Assistant Training Program.*



TRACK #3

Resume Writing 101 (non-MCLE presentation)

Karen Whitaker

During this session, we will cover resume writing, as well as common mistakes made in a resume.

Karen Whitaker possesses over 7 years of legal recruiting experience in the greater Bay Area. She opened the San Jose branch of Legal Ease LLC in 2003 and is the manager of both the San Francisco and San Jose offices. Legal Ease LLC specializes in the direct hire and temporary placement of attorneys, paralegals, legal secretaries and administration. Ms. Whitaker's prior legal experience as a legal secretary and executive assistant has laid the groundwork for her success as a leader and staffing specialist in the legal field.

Writing Tips and Tricks (non-MCLE presentation)

Jill Meryl Levy

Paralegal and published author Jill Meryl Levy will share some of her favorite tips for recognizing and correcting common writing problems, being clear and concise, and making weak writing strong or good writing better. Her goals ... to get you hooked on writing and to empower you to improve your skills no matter what kind of writing you do.

Jill Meryl Levy entered the paralegal field after an injury sustained in the line of duty as a volunteer firefighter plunged her into nightmare battles with Workers' Comp and a negligent doctor. Ms. Levy owns her own business called Firebelle Productions. She also works as a paralegal for the Abronson Law Offices. Ms. Levy has written nine books, including two grammar reference books and a guide to writing good test questions.

Certification: What Is It and Do I Need It? (non-MCLE presentation)

Panel

Representatives from the National Association of Legal Assistants (NALA), the National Federation of Paralegal Associations (NfPA), and the Commission for Advanced California Paralegal Specialization (CACPS) will discuss the options available to receive paralegal certifications, and how the certification helps the professional paralegal in the workforce.

Business and Professions Code 6450 (Ethics MCLE)

Carolyn Davis

Have you ever wanted to know about Business and Professions Code 6450? Now is your chance! Learn what the law says and how to comply with the requirements set by the code.

Carolyn S. Davis, ACP, CRM, is an experienced intellectual property and complex litigation trial paralegal. She has an undergraduate degree from the University of California Berkeley and an A.B.A. Approved Paralegal Certificate with a GPA of 4.0 from the West Valley College Paralegal Program where she is now part of the Associate Faculty Pool. Ms. Davis will teach Patent Litigation in the Spring of 2011. She was one of eleven paralegals selected nationally for the National Association of Legal Assistants' (NALA) Leadership Enhancement and Preparation (LEAP) Program Class of 2010. Ms. Davis is a Certified Paralegal with Advanced Paralegal Certifications in Trial Practice, Contract Administration and Discovery. She also is a Certified Records Manager and is working towards an Electronic Discovery Certificate.

CAPA's 23rd Annual Educational Conference – June 25, 2011

Hotel Reservations: Holiday Inn – Fisherman's Wharf, 1300 Columbus Avenue, San Francisco, CA 94133.

Make your hotel reservations early by calling 1-800-942-7348. The discounted room rate is \$140.00 a night.

Please be sure to ask for the special CAPA discount when making reservations.



Join us in beautiful San Francisco for CAPA's 23rd Annual Educational Conference. Bring your family and have fun while you learn.

You'll be close to all the major attractions, adventure, recreation, culture and excitement of bustling downtown San Francisco and the beautiful Bay Area.

The discounted room rate of \$140.00 per night will be extended to CAPA guests for 3 nights preceding and 3 nights after the conference.

REGISTRATION FEES **EARLY BIRD PRIOR TO MAY 1, 2011:**

CAPA Members - \$115.00

Non-Members - \$130.00

Students - \$95.00

REGISTRATION FEES **AFTER MAY 1, 2011:**

CAPA Members - \$135.00

Non-Members - \$150.00

Students - \$115.00

REGISTRATION FEES **AT THE DOOR ON JUNE 25, 2011:**

CAPA Members - \$155.00

Non-Members - \$170.00

Students - \$135.00

Continental Breakfast and Lunch Included in all registration fees.

NAME: _____

SPECIALITY DESIGNATION: _____ AFFILIATED ASSOCIATION: _____

ADDRESS: _____

PHONE:_() _____ E-MAIL ADDRESS: _____

(If you are a member of an affiliated association, you pay the member rates above.)

SESSIONS (Please feel free to mix tracks/sessions).

Track 1

Track 2

Track 3

Make checks payable to CAPA and mail it with your registration form to: Educational Conference, C/O CAPA, P. O. Box 1055, San Leandro, CA 94577. No refunds provided, but registration transfer will be accepted. You can also register on-line using your credit card at www.caparalegal.org. Registration confirmation is only available via e-mail. For additional information, please e-mail the conference Chairperson, Melisa Frick, at melisa.frick@yahoo.com. The California Alliance of Paralegal Associations is a California State Bar approved MCLE provider. The conference may provide up to 5 hours of General MCLE credit and 1 hour of Ethics MCLE Credit (*non-MCLE sessions are noted on the relevant Track summary pages.*)