Practical Skills for the Small Office and General Practice Paralegal

SUMMARY: This program covers relevant general practice topics for paralegals of all experience levels working in a small office or general practice setting. Spend the day strengthening your knowledge of these fundamental and ever-important skills.

- Explore the process of forming and organizing a North Carolina entity
- Navigate the world of litigation with important tips and strategies to manage a case from inception through trial
- Enhance your marketing strategies with helpful tips and tricks
- Perfect your everyday writing skills
- Refresh your knowledge of current Notary practices
- Enrich your understanding of trust accounting principles and obligations

LIVE • LIVE WEBCAST
Thursday, November 10, 2016
NC Bar Center, Cary

VIDEO REPLAYS (at printing)
Cary  Wed., January 11, 2017
Gastonia  Wed., January 25, 2017
Wilmington  Fri., January 13, 2017
Winston-Salem  Wed., January 18, 2017

CPE CREDIT: 6.0 Hours
Includes 1.0 Hour Ethics/Professional Responsibility

UPDATES & REGISTRATION
www.tinyurl.com/CLE577GPP

Planned by the NCBA Paralegal Division

The North Carolina Bar Association Foundation is accredited by the North Carolina State Bar as a provider of continuing legal education.
FOUR WAYS TO REGISTER

ONLINE™ www.ncbar.org/CLE • PHONE* 800.228.3402 • FAX* 919.677.1774
MAIL* Attn: Accounting, NCBA Foundation, P.O. Box 3688, Cary, NC 27519-3688

*Credit cards only. **Please make checks payable to the NCBA Foundation.

TUITION | LIVE • WEBCAST • VIDEO REPLAY (VR) | Select format and tuition rate below.

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VIDEO REPLAY LOCATIONS | For details and an updated list, see www.tinyurl.com/CLE577GPP

☐ Cary | #577BAR ☐ Wilmington | #577WLM
☐ Gastonia | #577GAS ☐ Winston-Salem | #577WIN
☐ Other (if applicable, from website): City:____________________ | Code: #577______

REGISTRANT INFORMATION | Please print clearly.

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Card Number: ____________________________ Expiration Date: ____________________________
Total Amount: ____________________________ Signature: ____________________________
Thursday, November 10, 2016, 8:30a–4:15p

8:30a  Registration

8:55  Announcements and Introductions

9:00  Business Law Basics: Tackling All Those Forms
Stephanie C. Crosby

Forming entities and preparing organizational documents are often the first things that a new business paralegal has to tackle. Where are the forms and what do they mean? Learn where to find the forms, how to fill them out and how to make sure you are doing what your client needs. We discuss forming North Carolina entities, preparing bylaws, organizational minutes, operating agreements and other things that new paralegals need to know about business law.

10:00  Litigation Case Management: Best Practices for Paralegals
Stephanie B. Elliott

Litigation is war. How you organize yourself, your team and your case has a huge impact on your ability to manage a case from its inception through trial. This program provides tips, strategies and checklists from a seasoned litigation paralegal. Key topics to be discussed center around organizing yourself, your attorney and your case, document control and litigation support, and people management. Learn how experienced paralegals use case management strategies to prepare for trial.

11:00  Break

11:15  Management, Marketing and More for the Small Office Paralegal
Erica C. McAdoo

This session focuses on the various roles often (voluntarily and involuntarily) assumed by paralegals in small office settings. Attendees can expect to hear budget-friendly marketing ideas as well as tips and tricks to help paralegals effectively and efficiently manage multiple roles with limited time.

12:15p  Networking Lunch (included at Live program only)

1:00  Writing Tips for Every Day Practice
Sarah C. W. Baker

This session discusses those key writing tips that every legal professional can use in order to be a successful communicator. Learn how to enhance various aspects of your everyday writing style.

2:00  What’s New in the Notary Profession
Ozie H. Stallworth

This session focuses on the recent new laws, the new notary public manual and new items related to electronic notarization.

3:00  Break

3:15  Ethics—Trust Accounting Compliance*
Peter G. Bolac

This program on trust accounting covers Rule 1.15, key concepts, deposits, disbursements, recordkeeping and the latest tips on protecting funds from embezzlement and fraud. The program also focuses on recent amendments to Rule 1.15 and the State Bar’s Random Audit Program, while leaving time for audience questions.

4:15  Adjourn

*Indicates portion providing Ethics/Professional Responsibility credit
Do you find yourself reinventing the wheel? Are there better and easier ways to accomplish necessary tasks?

The NC Small Law Office Resource Manual, available in print and E-PDF, is designed to provide practical and concise answers to these and many other everyday law practice management questions. This outstanding resource:

• Helps you find practical solutions to the most common questions and problems that arise in any practice; and

• Includes sample forms and checklists, including job applications, hiring and firing checklists, chart of accounts, and much more.

Visit www.ncbar.org/CLE and click on Publications for details.
Program Information

Planners
- Stephanie C. Minor, ACP, NCCP, Duke University Office of Counsel, Durham
- Shelby G. Tyson, NCCP, Duke University Office of Counsel, Durham

Speakers
- Sarah C. W. Baker, Duke University School of Law, Durham
- Peter G. Bolac, North Carolina State Bar, Raleigh
- Stephanie C. Crosby, NCCP, Ward and Smith PA, New Bern
- Stephanie B. Elliott, McNair Law Firm PA, Charlotte
- Erica C. McAdoo, The Paynter Law Firm PLLC, Hillsborough
- Ozie H. Stallworth, North Carolina Department of the Secretary of State, Raleigh

We extend our sincere gratitude to the NCBA Paralegal Division, and the planners and speakers who volunteer their time and expertise toward the goal of presenting an educational program of the very highest quality.

Hotel Information
Contact hotels directly for reservations at the special NCBA room rate. Rates are based on availability and may sell out.

- Embassy Suites, 201 Harrison Oaks Boulevard, Cary
  Rate: $169 Single/Double. Rate includes a full cooked-to-order breakfast and the manager's evening reception.
  Reservations: 919.677.1840 | Reference Corporate ID: NCB or NC Bar Rate

- TownePlace Suites by Marriott, 120 Sage Commons Way, Cary
  Rate: $106 studio queen with sleeper sofa (Sunday–Thursday). Rate includes a complimentary hot breakfast. All rooms come with a fully equipped kitchen.
  Reservations: 919.678.0005 | Ask for the NC Bar Association corporate rate.
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“Exceptional speakers!”
“Great overall program covering different areas of practice.”

—Attendees, Practical Skills for North Carolina Paralegals