Paralegals

2017 NCBA Paralegal Division Annual Meeting

LIVE
Friday, May 5, 2017
Pinehurst Resort, Pinehurst

VIDEO REPLAYS (at printing)
Cary Thursday, August 24, 2017
Concord Friday, July 14, 2017

CPE CREDIT: 6.0 Hours
Includes up to 2.0 Hours Ethics/Professional Responsibility

UPDATES & REGISTRATION
www.tinyurl.com/CPE573PDM

Planned by the NCBA Paralegal Division

SUMMARY: This advanced-level program offers outstanding opportunities to grow professionally, network and attend substantive breakout sessions designed to educate you and energize your career.

• Hear about developments in military and veterans law, immigration law, managing workers’ compensation claims, and the effects of marriage equality on North Carolina same-sex families.

• Discuss filing pitfalls to pending statute changes at the NC Secretary of State’s office, consumer issues with the Consumer Affairs Section of the NCDOJ and complex commercial loan transactions (corporate track).

• Examine 706 tax returns, guardianship proceedings for paralegals, power of attorney litigation and violations of fiduciary duties (estate planning/fiduciary law track).

• Discuss errors and other factors that contribute to wrongful convictions and legal steps toward exoneration, tools and tips to navigate the state court system, and ethics in social media evidence (litigation track).

• Better understand malpractice claims and lessons learned, the NC/SC boundary realignment, and commercial real estate agreements—while assessing situations where drafting either saved the day or caused a lawsuit (real property track).

• Learn what’s new in the world of technology and how digital communications push the limits of the rules of professional conduct.

The North Carolina Bar Association Foundation is accredited by the North Carolina State Bar as a provider of continuing legal education.
2017 NCBA Paralegal Division Annual Meeting
#573PDM | May 5, 2017

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

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VIDEO REPLAY LOCATIONS | For details and updates, see www.tinyurl.com/CPE573PDM
- Cary | #573BAR | August 24
- Concord | #573CRD | July 17
- Other (if applicable, from website):

REGISTRANT INFORMATION | Please print clearly.

Print Full Name: ____________________________
Firm/Organization Name: ____________________________
Address: ____________________________
City, State and ZIP: ____________________________
Daytime Phone Number: ____________________________
Email Address: ____________________________
NC State Bar No. (Required for MCLE Credit): ____________________________

PAYMENT | Registration is processed only after payment is received. Please print clearly.
- Enclosed is a check, payable to the NCBA Foundation.  - Please charge my credit card.

Card Number: ____________________________ Expiration Date: ____________________________
Total Amount: ____________________________ Signature: ____________________________

FINE PRINT • REGISTRATION Registrations are limited by space, and may include a live video broadcast overflow room. TRANSFERS Registrants may transfer from a Live program, Video Replay, Webcast, Webinar or Phone/Audio Streaming Program without penalty within three business days after the program date. CANCELLATIONS Cancellations must be received by 9:00 a.m. the third business day prior to the program to qualify for a refund (less $75 administrative fee). Those not attending will receive the digital program materials in full consideration of tuition paid. MCLE CREDIT The North Carolina Bar Association Foundation is an accredited CLE sponsor under the MCLE Regulations promulgated by the NC State Bar Board of Continuing Legal Education. This program is approved (but not sponsored) by the Board for the State Bar's Mandatory Continuing Legal Education program, the Chief Justice's Commission on Professionalism and the Chief Justice's Equal Access to Justice Commission. Your tuition also includes digital access to all program materials. DIGITAL PROGRAM MATERIALS You will receive a notification email when digital materials are available to download. To retrieve digital materials, log in and select “Your Course Materials” on the CLE website. All of the materials for this program will be available for download in advance of the program. VIDEO REPLAYS To qualify for the Early Bird tuition, registration must be received one week prior to program date. NC State Bar rules require a minimum number of preregistered active State Bar members. The NCBA Foundation reserves the right to cancel any video program prior to the program date if registrations do not meet the NC State Bar requirement. Some sites require additional registration or evaluation forms. Visit www.tinyurl.com/CPE573PDM to confirm video replay registration and program start times. CLE credit hours at Video Replays are subject to change. Video replay program attendees may purchase the printed manuscript at cost. Due to printing and shipping lead times we are unable to accommodate requests for print materials made fewer than seven (7) days prior to any video replay program. INCLEMENT WEATHER We make every effort to notify registrants when a program is canceled or delayed due to weather. If inclement weather is forecast, please check your local news listings or contact event venue. NCBA programs will follow the work schedule of the hosting institutions, to include delayed openings. CLE SCHOLARSHIPS A limited number of scholarships are available to members in financial need. Contact Membership Services at 1.800.662.7407 or email akemple@ncbar.org. EVENT SPONSOR AND EXHIBITOR OPPORTUNITIES Interested in meeting the attendees of this program? Become an exhibitor or sponsor! Contact Jennifer Shapiro at CLESponsorship@ncbar.org for detailed information about these opportunities and their benefits. FOR MORE INFORMATION, VISIT WWW. NCBAR.ORG/CLE.
Program Agenda

Friday, May 5, 2017, 8:00a–4:35p

8:00a  Registration

8:30  Welcome and Opening Remarks

8:35  Technology Tips for Paralegals | Joyce P. Brafford
   It can be hard to keep up with the frequent changes in technology with the flood of information and data coming at you. This dynamic session focuses on what's new in the world of technology. Attendees walk away with actionable, cost-effective and productivity-enhancing tips, gadgets, services, and websites to help power your practice and firm.

9:35  Morning Break | Sponsored by Campbell University School of Law

9:50  Breakout Sessions (Please choose one)
   • New Developments in Military & Veterans Law in North Carolina | David L. Hayden
     This presentation covers a number of areas including the new cabinet level department within the NC governor’s office and an overview of the programs and information available to assist service members and veterans in NC.
   • Hot Topics in Immigration Law: How to Keep Your Cool When Things Heat Up | Jessica L. Yañez
     Hear the latest trends and changes in the practice of immigration law and how to work effectively with supervising attorneys while managing client expectations and providing top-notch customer service.
   • Managing Workers’ Compensation Claims: Improving Outcomes Through Good Customer Service | Sheila W. Chavis
     This session provides information on the methods and manner in which good customer service and personalized interaction by the paralegal (on either side of the bar) can help your firm achieve exceptional outcomes. The discussion addresses the impact of verbal and written communications and interactions with your customers/clients. It is also anticipated that this session provides a forum for discussing successes and failures amongst the group.
   • Out of the Closet and Into Your Office: The Effects of Marriage Equality on North Carolina Same-Sex Families | Angela L. Haas
     Learn about the history of marriage equality, the importance of knowing your client, the ever-changing legal landscape in the application of various laws related to marriage, and the unique factors that must be considered when assisting LGBT clients with family law and related matters.

10:50  Breakout Transition

11:00  Track Breakout Sessions (Please choose one)
   • CORPORATE | Face-to-Face with the Secretary of State’s Office | Daniel Crabbe, Cheri L. Myers and Keith West
     Hear about filing pitfalls, common errors causing rejection of documents, address verification, website rewrite, filing statistics, pending statute changes, and a Q&A.
   • ESTATE PLANNING/FIDUCIARY LAW | U.S. Estate and Generation Skipping Tax Return (Form 706): Still Relevant for Many Estates | Edgar S. “Pat” Levy III
     In this presentation we identify the circumstances which may require a Form 706 filing, highlight the significant steps in preparing the Form 706, describe a typical IRS audit of a Form 706 and consider the future of the Form 706 in light of the possibility of estate tax repeal in the current political environment.
   • LITIGATION | From Crime to Exoneration: A Primer on How People Are Wrongfully Convicted and How They Gain Relief | Theresa A. Newman
     Using the lessons learned from the Duke Law Wrongful Convictions Clinic, we identify errors and other factors that contribute to wrongful convictions and trace the legal steps toward exoneration.
   • REAL PROPERTY | The “Oh No” Moment: Real Estate Malpractice Claims and Lessons Learned | Troy Crawford
     Learn about traps faced by both practitioners and paralegals, review case studies, and hear suggestions for practices and procedures designed to avoid future claims.
Networking Lunch (included at Live program only)

Paralegal Division Annual Meeting | Annette L. Phelps, Benton Family Law, Goldsboro, 2016-2017 Paralegal Division Chair, presiding

110 Track Breakout Sessions (Please choose one)

- CORPORATE | Consumer Issues in North Carolina | Kevin L. Anderson
  This program discusses the Consumer Affairs Section of the NC Department of Justice, its structure, the tools and information available to assist consumers, and the section's enforcement actions.

- ESTATE PLANNING/FIDUCIARY LAW | Guardianship Proceedings for Paralegals | Natalie J. Miller
  This session focuses on the forms and procedures related to the incompetence and guardianship proceedings, including professional standards and practices, legal/ethical responsibilities to the court and protected person, and the newly adopted Uniform Adult Guardianship Protective Proceedings Jurisdiction Act (UAGPPJA).

- LITIGATION | Civil Case Management Tools and Tips | Kellie Z. Myers
  Learn various civil case management tools used by court managers to ensure cases are moved efficiently through the state court system.

  A discussion of the NC/SC Boundary Realignment—its history, effect, issues and practical application of the resulting legislation going forward.

2:10 Breakout Transition

2:20 Track Breakout Sessions (Please choose one)

- CORPORATE | Fundamentals of Commercial Lending Transactions | Patrick T. Strubbe
  This session covers all aspects of a complex commercial loan transaction and highlights the importance of understanding the parties and roles involved in the transaction, a good closing checklist, the types of loan documents, and the closing and post-closing processes.

- ESTATE PLANNING/FIDUCIARY LAW | Power of Attorney Litigation | W. Kirk Sanders
  With the expanded use of power of attorneys there has been a rising increase in violations of the fiduciary duties. Learn about the warning signs of power of abuse violations, litigation methods for these cases, duties of power of attorneys, practice tips, issues and concerns.

- LITIGATION | Ethics of Social Media Evidence* | Kelly Routh
  This discussion covers ethical topics related to keeping up with technology, obtaining evidence, confidentiality and privilege, prejudicial evidence, and the ethics of evidence preparation.

- REAL PROPERTY | Commercial Real Estate Purchase Agreements: Agreeing to Disagree | Margaret Shea Burnham
  This session looks at drafting tips for purchase agreements and includes checklists for the contract itself through closing. The material includes cases where drafting either saved the day or caused a lawsuit.

3:20 Afternoon Break

3:35 Emerging Ethics: Regulating the 2.0 Frontier* | Warren T. Savage and Camille Stell
  New technology and digital communications are pushing the limits of the Rules of Professional Conduct. Can we apply the rules designed for old school law practice to the internet, email, blogging and social media? This presentation provides an update on social media ethics opinions, discusses how ethics opinions are issued from the North Carolina State Bar, and reviews new and pending North Carolina State Bar ethics opinions.

4:35 Adjourn

* Indicates portion providing Ethics/Professional Responsibility credit
**Program Information**

**Planners**
- Ann M. Cantrell, NCCP, Nexsen Pruet PLLC, Greensboro
- Stephanie C. Crosby, NCCP, Ward and Smith PA, New Bern
- Shelby G. Tyson, NCCP, Duke University Office of Counsel, Durham
- Linda R. Wetherbee, CP, Rutledge & Rutledge, Walnut Cove

**Speakers**
- Kevin L. Anderson, North Carolina Department of Justice, Raleigh
- Joyce P. Brafford, North Carolina Bar Association, Cary
- Margaret Shea Burnham, Nexsen Pruet PLLC, Greensboro
- Christopher L. Burti, Statewide Title Inc., Farmville
- Sheila W. Chavis, Brent Adams & Associates, Raleigh
- Daniel Crabbe, North Carolina Secretary of State's Office, Raleigh
- Troy Crawford, Lawyers Mutual Liability Insurance Company of North Carolina, Cary
- Angela L. Haas, Haas Tharrington Attorneys at Law, Raleigh
- David L. Hayden, Smith Anderson Blount Dorsett Mitchell & Jernigan LLP, Raleigh
- Edgar S. "Pat" Levy III, Wyatt Early Harris Wheeler LLP, High Point
- Natalie J. Miller, Law Office of Natalie J. Miller PLLC, Mooresville
- Cheri L. Myers, North Carolina Secretary of State's Office, Raleigh
- Kellie Z. Myers, Tenth Judicial District, Raleigh
- Theresa A. Newman, Wrongful Convictions Clinic, Duke University School of Law, Durham
- Kelly Routh, Dozier Miller Law Group, Charlotte
- W. Kirk Sanders, Hendrick Bryant Nerhood Sanders & Otis LLP, Winston-Salem
- Camille Stell, Lawyers Mutual Liability Insurance Company of North Carolina, Cary
- Patrick T. Strubbe, Womble Carlyle Sandridge & Rice LLP, Charlotte
- Keith West, North Carolina Secretary of State's Office, Raleigh
- Jessica L. Yañez, Yañez Immigration Law, Greensboro

**Sponsor** (at time of printing)
- **SILVER SPONSOR**: Campbell University School of Law

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We extend our sincere gratitude to the 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.

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**Hotel Information**

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

**Pinehurst Resort**
80 Carolina Vista Drive, Pinehurst
**Rate**: $179 single or double occupancy. Rate is per person, per night and includes lodging only.
**Reservations**: 855.235.8507
**Rate Code**: NC Bar Association
**Booking ID**: 63505
**Cutoff Date**: April 11, 2017
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www.tinyurl.com/CLE573PDM

NEW RELEASE!

 pragmatic Skills for North Carolina Family Law Paralegals
By Jennifer R. Smith, Monica A. Inzaina and Pamela Deeds Stewart

For details or to order, go to www.ncbar.org/CLE and click on Publications

“Excellent program. High-level CPE sessions and a wide range of topics from which to choose. The two general sessions were engaging and relevant to all attendees.”

“The breakout sessions I attended will go a long way to improve my work.”

—Attendees of the 2016 NCBA Paralegal Division Annual Meeting