Phone/Audio Streaming Programs

Phone/Audio Streaming Program Details

**CLE CREDIT:** 1.0 Hour for each program

**TIME:** See individual program information.

**TUITION:** $80 per program

*Co-sponsored with WebCredenza*

**WHAT IS A PHONE/AUDIO STREAMING PROGRAM?**
Phone Programs are LIVE, interactive audio discussions of timely subjects that you can receive in your office, your home or wherever you can place a phone call or have access to the Internet. Because Phone/Audio Streaming Programs are live for State Bar MCLE purposes, there is no limit on the number of Phone/Audio Streaming Programs you may take per year.

**WHY WOULD I WANT TO REGISTER FOR A PHONE/AUDIO STREAMING PROGRAM?**
Convenience! Stay current on law and practice issues without leaving your office. Phone/Audio Streaming Programs save you time and travel.

**WILL I BE ABLE TO ASK QUESTIONS?**
Phone participants will be prompted to ask questions of the faculty at the conclusion of the program. Streaming participants can post questions at anytime during the program. They will be addressed by the moderator before signing off.

**HOW DO I CONNECT WITH A PHONE/AUDIO STREAMING PROGRAM?**

**Calling in:** Use any phone. After you register for a program, you will be provided a special toll-free number to call on the day of the program. When you call the number, you will be connected to the program. Your call-in information and instructions will be available in your online learning account at [www.ncbar.org/CLE](http://www.ncbar.org/CLE). Once logged in, click on “My Classroom,” then the “My Courses” tab and find the program title you are attending.

**Audio Streaming:** Use any device that has access to the Internet. On the day of the program log into the NCBA CLE Online Learning Center at [www.ncbar.org/CLE](http://www.ncbar.org/CLE) (click “Log In” located in the top right corner). Once logged in, click “Your Classroom” and find the program title you are attending. Click “Launch Web Event” button and a new window will open your audio streaming screen.

March Phone/Audio Streaming Programs

**Service Level Agreements in Technology Contracting | #756TWC**
March 1, 2018, 1:00–2:00p

CLE Credit: 1.0 Hour

Service Level Agreements set a baseline of service that a vendor provides a client. The underlying services often involve IT, telecom, web hosting or other technology services. SLAs are essential to ensuring a client receives the benefit of the bargain. This program provides a guide to reviewing and drafting SLAs.

**Discretionary Trusts: Risks, Opportunities and Best Uses | #756TW2**
March 2, 2018, 1:00–2:00p

CLE Credit: 1.0 Hour

Discretionary trusts are complex trusts that provide fiduciaries wide discretion in distributing trust income or even corpus. Because a trustee’s discretion is broad, they are often subject to attack by beneficiaries. If discretion is too broad and not subject to an “ascertainable standard,” distributions also risk sharply adverse tax consequences. This program provides a guide to the risks and opportunities of planning with discretionary trusts.

**Ethics, Disqualification and Sanctions in Litigation | Live Replay from October 6, 2017 | #756TW3**
March 5, 2018, 1:00–2:00p

CLE Credit: 1.0 Hour Ethics/Professional Responsibility

This program discusses the interrelationship of attorney ethics rules to disqualifications from representing clients in certain matters, and how the disqualification may result in ethical sanctions. The program also covers how ethical claims are improperly used to impact litigation and ethical risks of those improper claims.

**Successor Liability in Business Transactions | #756TW4**
March 6, 2018, 1:00–2:00p

CLE Credit: 1.0 Hour

When buyers acquire business assets, they do not generally also acquire the seller’s liabilities unless they attach to that asset. However, there are many common law theories that “tag” the buyer with the seller’s business liabilities seen when the underlying asset was not collateral. This program provides a guide to the instances where the buyer succeeds, to the seller’s liabilities and practical strategies for avoiding those liabilities.

**Family Feuds in Trusts: How to Anticipate and Avoid | #756TW5**
March 7, 2018, 1:00–2:00p

CLE Credit: 1.0 Hour

Family disputes in trusts are commonplace. Disputes may arise from everyday disagreements over money or larger issues arising from blended families, sibling rivalries or differing inter-generational interests. This program discusses planning and administration techniques for avoiding or resolving these disputes before they result in costly and destructive litigation. The program also covers special issues when family businesses are involved.
Ethics of Representing the Elderly | Live Replay from April 21, 2017 | #756TW6
March 8, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour Ethics/Professional Responsibility
Attorneys representing elderly clients have many special ethical challenges. Foremost is the question of competency to make major decisions. There are also issues related to identifying your client, confidentiality issues when the client relies on family members or other caregivers, preserving the attorney-client privilege, and issues related to the discovery of financial or physical exploitation. This program covers these and other important ethical issues when attorneys represent the elderly.

Drafting Professional and Personal Services Agreements | #756TW7
March 9, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
In a service-based economy, the delivery of professional services is often more important to a company’s success than the manufacturing and delivery of goods. Personal services agreements, however, are different than goods-based contracts, involving different performance standards, reporting and delivery, remedies, and more. This program provides a guide to drafting major provisions of professional services agreements.

Recission in Business Transactions: How to Fix Something That’s Gone Wrong | Live Replay from April 18, 2017 | #756TW8
March 12, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
Even with careful drafting and internal law firm controls, errors are sometimes made in transactional documents. Recission allows certain agreements or provisions to be voided, but rescinding certain provisions of an agreement or the agreement itself is fraught with risk, legal liability and tax liability. This program provides a guide to best practices with recission and the practical substantive legal and tax consequences.

Fiduciary Duties in Closely-held Companies: What Owners Owe the Business and Other Owners | #756TW9
March 13, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
Owners of closely-held companies are unlike shareholders of publicly traded corporations. Closely-held owners — whether members of an LLC, partners of a partnership, or shareholders of a closely-held C or S Corp — often owe other owners fiduciary duties. This may be because they are also directors or managers of the entity or because they are majority holders owing a duty to minority holders. This program provides a guide to fiduciary duties inside closely-held companies.

Role of LLCs in Trust and Estate Planning | #756T10
March 14, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
LLCs have many advantages in trust estate planning. This program covers use of LLCs to achieve valuation discounts, impact of LLCs on income tax planning for trusts and estates, handling legacy real estate, tax basis issues and planning, and much more.

Ethics and Conflicts with Clients – Part 1 | Live Replay from November 13, 2017 | #756T11
March 15, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour Ethics/Professional Responsibility
This program discusses ethical issues in a wide range of circumstances in which attorneys find themselves in conflicts with their clients. Among other topics, the program covers gifts from clients, personal relationships with clients, going into business with clients, fee disputes with clients, settlement authority with clients and much more.

Ethics and Conflicts with Clients – Part 2 | Live Replay from November 14, 2017 | #756T12
March 16, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour Ethics/Professional Responsibility
This program discusses ethical issues in a wide range of circumstances in which attorneys find themselves in conflicts with their clients. Among other topics, the program covers gifts from clients, personal relationships with clients, going into business with clients, fee disputes with clients, settlement authority with clients and much more.

Ethics for Transactional Lawyers | Live Replay from November 3, 2017 | #756T13
March 19, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour Ethics/Professional Responsibility
This program provides a real-world guide to major ethical issues in transactional practice. Among other issues, the discussion covers identifying your client among partners or between an organization and its owner group, ethics when negotiating with unrepresented third parties, voluntary and mandatory disclosures when wrongdoing is discovered, issues when in-house counsel and outside counsel are involved in a matter, preserving the attorney-client privilege when representing an entity, issues in joint representations and more.

Indemnification and Hold Harmless Agreements in Real Estate Transactions | #756T14
March 20, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
Managing known and unknown risks is crucial to successful real estate transactions. Indemnification agreements and “hold harmless” provisions are essential tools to control that risk. This program provides a real-world guide to drafting indemnification agreements and hold harmless provisions in real estate transactions.

LLC, Partners, LP and Pass-through Mergers – Part 1 | Live Replay from May 16, 2017 | #756T15
March 21, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
This program covers the substantive legal and tax issues of planning and drafting an acquisition, merger, or other combination of pass-through entities LLCs, partnerships and LPs. The program discusses alternative transactional structures for these combinations, the practical legal and tax tradeoffs and recent developments.

LLC, Partners, LP and Pass-through Mergers – Part 2 | Live Replay from May 17, 2017 | #756T16
March 22, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
This program covers the substantive legal and tax issues of planning and drafting an acquisition, merger, or other combination of pass-through entities LLCs, partnerships and LPs. The program discusses alternative transactional structures for these combinations, the practical legal and tax tradeoffs and recent developments.

Lawyer Ethics and Credit Cards | Live Replay from June 22, 2017 | #756T17
March 23, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour Ethics/Professional Responsibility
This program explores the fascinating area of ethics and the use by attorneys of credit cards to fund law firm expenses, and the many ways in which that may give rise to ethical issues. The program covers the long line of ethics decisions in this area and discusses best practices for avoiding liability.
From One Thing to Another: Business Entity Conversions and Domestication | Live Replay from June 27, 2017 | #756T18
March 26, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
Businesses change their form of entity for many reasons; the tax or economic posture of owners may change, new investors may require a different form of entity, or market or regulatory conditions may indicate a different form of entity. Whenever an entity is converted from one form to another, significant tax liability and corporate or partnership law issues arise. This program provides a real-world guide to entity conversions among C Corps, S Corps, partnerships and Limited Liability Companies, with extensive discussions of the tax and non-tax implications of the conversions.

Lawyer Ethics When Clients Won’t Pay Fees | #756T19
March 27, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour Ethics/Professional Responsibility
This program covers the range of ethical issues that arise when a client refuses to pay your fees. What can you do to compel payment? May you withhold further representation? What can you do to defend yourself against ethical complaints? These and other questions are answered in this practical guide to ethical issues when clients won’t pay your fees.

Structuring For-Profit/Nonprofit Joint Ventures | #756T20
March 28, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
Joint ventures between nonprofit and for-profit organizations come with substantial complexity and the risk of compromising the nonprofits tax status. This program provides a practical guide to structuring and drafting nonprofit/for-profit joint ventures with an emphasis on the tax consequences of these ventures and preserving the nonprofit’s tax status.

Drafting Subleases and Assignments in Commercial Real Estate – Part 1 | Live Replay from June 20, 2017 | #756T21
March 29, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
This program covers the forms of subleasing and assignments, as well as drafting the (often complex) underlying documents governing the relationships among the master landlord, the tenant/sublandlord and subtenant. Among other topics, the program covers the types of subleases, standards of reasonableness, the motivations and interests of the parties, and reviews the most highly negotiated provisions of these agreements.

Drafting Subleases and Assignments in Commercial Real Estate – Part 2 | Live Replay from June 21, 2017 | #756T22
March 30, 2018, 1:00–2:00p
CLE Credit: 1.0 Hour
This program covers the forms of subleasing and assignments, as well as drafting the (often complex) underlying documents governing the relationships among the master landlord, the tenant/sublandlord and subtenant. Among other topics, the program covers the types of subleases, standards of reasonableness, the motivations and interests of the parties, and reviews the most highly negotiated provisions of these agreements.

Interested in Video Replays? Visit ncbar.org/CLE and click on “Live Onsite.”

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NCBA Members | Receive reduced registration fees.
NCBA Section Members | Section members receive a discount off the regular member rate on section-planned CLE programs. If you are not a member of the indicated section and wish to join, you may do so at the time of program registration.
NCBA Paralegal Division Members | NCBA non-attorney Paralegal Division members receive reduced registration fees. Please check program brochure for tuition and exceptions.
First Year Licensed in NC (NCBA Members) | First year attorneys licensed to practice in NC (who are also NCBA members) receive a reduced registration fee of $99 for live and video replay programming (maximum of 7.0 credit hours) in the first year of membership with the NCBA. Some exclusions apply.
CLE Passport | You must have paid the Passport enrollment fee for that enrollment year. Please note 1 token equals 1 passport hour. This category is subject to certain restrictions. Call the CLE Department for more information.
Non-Members | Are welcome to register and attend any of the CLE programs. Non-members may join the NCBA and register at the member rate.
Purchasing Program Materials | Program materials are available after the initial live program date for purchase in the CLE Bookstore. Program materials are available in a digital download, printed format or both when purchased after the live program date. Allow two to four weeks for delivery of printed materials. If you are attending a video replay program and considering purchasing program materials for that program, please read the information under Video Replays.
Digital Program Materials | Effective July 1, 2015, all CLE program materials are 100% digital. Digital materials will be available to download to your device from your NCBA account up to seven (7) days prior to the CLE program. Please download your materials in advance and bring that device to the CLE program. If you have any questions or would like assistance, please contact the CLE Department.
The following registration categories do not include MCLE fees:
Judges | You must be a member of the NCBA.
Clerks of Court | You must be a member of the NCBA.
Law Professors | You must be a full-time professor at an ABA-approved law school, or a law school seeking ABA accreditation, and a member of the NCBA.
Law Students and Paralegal Division Students | You must be a member of the NCBA Law Student or Paralegal Student Division.
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.
MCLE Credit | The North Carolina Bar Association (NCBA) is an accredited CLE sponsor under the Mandatory CLE Regulations promulgated by the Board of Continuing Legal Education of the North Carolina State Bar. These programs have been approved (but are not sponsored) by the Board for the designated number of CLE hours. The NCBA is also an accredited sponsor for mandatory CLE in other states.

REGISTRATION INFORMATION | Registrations (including door registrations) are limited to available space. Available space is subject to certain restrictions. Call the CLE Department for more information.

Cancellations | Cancellations must be received by 9:00a on the third working day prior to the program in order to qualify for a refund (less $75 administrative processing fee).

Transfers | Registrants wishing to transfer their registrations from a Live program, Video Replay, Webcast, Webinar or Phone/Audio Streaming Program may do so without penalty within three (3) working days after the program concludes. A registration may be transferred ONCE. Registrants may not transfer to or from an Online CLE program, a Webcast or Webinar done with a third-party vendor.

Video Replays | All program materials for Video Replay programs are 100% digital. Program materials may be downloaded to your device up to seven (7) days from the date of the program. Be sure to bring that device to your Video Replay program. Attendees opting to purchase printed program materials for a Video Replay program MUST call the CLE Department no later than seven (7) days before the program. The materials are sold at NCBA cost for printing and shipping. The materials will be shipped to the purchaser’s address of record in our system. Receipt of the materials cannot be guaranteed by the date of the program: we have no control over mailing timeframes once the materials have shipped. Early registration is requested for Video Replays to ensure space. NC State Bar rules require a minimum number of active State Bar members to register before MCLE credit will be given for a Video Replay. The NCBA reserves the right to cancel any video program prior to the program date if registrations do not meet this requirement. CLE hours of Video Replays are subject to change.

Persons with Disabilities | We make every effort to ensure that our programs are held in facilities which are fully accessible to persons with disabilities. If you plan to attend our program and need special facilities or assistance relating to a disability, please contact the CLE Department at least one week prior to the date of the program.

It remains the responsibility of each attorney to maintain records of his or her attendance at CLE programs for purposes of the annual report required by the State Bar. MCLE credit will be reported only if North Carolina State Bar number is provided.
CUSTOMER INFORMATION  •  Duplicate this form for additional registrants and make a copy for your records.

For MCLE Credit list both:  NC State Bar No.: _______  NCBA Member No.: ______________________

PRINT Full Name: ___________________________________________  Email: _______________________________

Firm/Agency Name: ___________________________________________  Business Phone: _______________________

Business Fax: _______________________________  Street Address: _______________________________________

P.O. Box No.: _______________________________  City, State, ZIP Code: _______________________________

Check here if new information on any line.

I am a:  □  CLE Passport Holder

$75 Tuition:  □  Judge (NCBA Member)  □  Clerk of Court (NCBA Member)  □  Law Professor (NCBA Member)

$25 Tuition:  □  NCBA Paralegal Student Member  □  NCBA Law Student Division Member

PROGRAM ORDER DETAILS

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BOOK ORDER DETAILS

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Book Subtotal: $_________

* Shipping and Handling: $ INCLUDED!

ORDER TOTAL  •  Please enter your program and book totals from the above sections and add together.

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ORDER TOTAL: $_________

PAYMENT

□  Check Enclosed (Payable to NCBA)  □  Visa  □  MasterCard  □  American Express

Card No. ___________________________________________  Exp. Date: ___________  Signature: _______________________

Please mail this completed form to NCBA,  Attn: Accounting  •  P.O. Box 3688, Cary, NC 27519, or fax to 919.677.1774.

See order form or call 800.228.3402 to register.  www.ncbar.org/CLE  •  15