

NORTH CAROLINA  

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BAR ASSOCIATION  
seeking liberty + justice

# NCBA 2018 Annual Review



## LIVE and WEBCAST

Thursday–Friday

October 25–26, 2018

North Carolina Bar Center

8000 Weston Parkway

Cary

## REGISTER TODAY!

Save 10% if registration is received by October 4, 2018.

[www.tinyurl.com/CLE690ARP](http://www.tinyurl.com/CLE690ARP)

**12.0**  
HOURS

TOTAL CLE CREDIT

**2.0**  
HOURS

Ethics/Professional  
Responsibility

**1.0**  
HOUR

Substance Abuse/  
Mental Health

## AVAILABLE FORMATS



## PROGRAM SUMMARY

Join us for 12 hours of credit at the *NCBA 2018 Annual Review*. For the tenth year, our speakers have put together a summary of important updates in North Carolina law.

Come ready to expand your knowledge and take home tools to improve your practice.

Attendees at this program:

- Hear updates on multiple areas of law, including business law, criminal law, civil law, family law and real property.
- Fulfill all your CLE requirements, including two hours ethics/professional responsibility credit and one hour substance abuse/mental health credit.
- Learn about hot topics and trends in legal tech.

## WHAT PEOPLE ARE SAYING...



Solid program!



Very engaging and informative speakers.



I'm taking away a greater awareness of trends in the law as well as the complications associated with technology and record protection!

—Attendees, *NCBA 2017 Annual Review*

# AGENDA

THURSDAY, OCTOBER 25, 2018 | 8:15 a.m. – 4:15 p.m.

**8:15 Registration and Continental Breakfast**

**8:55 Welcome and Introductions**

**9:00 Avoiding Common Ethical Pitfalls\***

Brocker and Waldenberg

Receive a detailed summary of how to avoid a bar complaint and what to do if you get one.

**10:00 Privacy and Cybersecurity Update**

Cordell and Johnson

Hear the most important updates about security for your firm and your clients. This session is important for anyone who transacts business online or who represents clients who do.

**11:00 Break**

**11:15 Business Law Update**

Baldwin, Clement and Mills

- Hear a review of statutory changes, including revisions to the North Carolina Business Corporation Act.
- Acquire case law update.
- Collect other changes important for your practice.

**12:15 Networking Lunch**

**1:00 Criminal Law Update**

Davis and Pritchett

- State Case Law Update: Key recent decisions from the North Carolina Supreme Court and North Carolina Court of Appeals

- Federal Case Law Update: Key recent decisions from the U.S. Supreme Court and U.S. Court of Appeals for the Fourth Circuit

**2:00 Focusing on Wellness as a Professional†**

Nagae

The high pressure and high stakes of legal practice can easily lead to knee-jerk, emotion-based reactions that can exhibit a low level of professionalism and may result in acts that are ethically questionable. In this session, learn:

- About mindfulness its benefits
- About meditation and how it is linked to mindfulness
- How developing mindfulness can lead to more professional, ethical decision making
- How to start a meditation practice
- To identify situations in which mindfulness can positively affect your decision making

**3:00 Break**

**3:15 Managing Your Practice into 2019**

Duncan

Receive best practice management tips for keeping your law firm on track as we move from 2018 to 2019. Come prepared to take notes on resources and tools that lawyers in your practice area are using to build successful, responsive and ethical practices.

**4:15 Adjourn**

# AGENDA

FRIDAY, OCTOBER 26, 2018 | 8:15 a.m. – 4:15 p.m.

**8:15 Registration and Continental Breakfast**

**8:55 Welcome and Introductions**

**9:00 Real Property Case Law Update**  
Hunt

Receive a review of the most relevant real property cases in North Carolina from the past 12 – 18 months.

**10:00 Civil Law Update**  
Harrell

- Hear recent key decisions from the North Carolina Supreme Court, Court of Appeals and Business Court
- Address substantive areas of civil law, Rules of Civil Procedure and Rules of Evidence

**11:00 Break**

**11:15 Elder Law Update**  
Rodberg

Hear an overview of state and federal changes in elder law and related practice areas over the past year including important statutory updates, critical case law and changes in the most commonly used forms.

**12:15 Networking Lunch**

**1:00 Family Law Update**  
Britt

Engage in a fast-paced overview of last year's family law cases and legislative changes including alimony/PSS, child custody and support, UCCJEA, equitable distribution, military pensions, and more.

**2:00 e-Ethics: Tricks, Traps and Trends\***  
Brown

Technology changes at an alarming rate. To keep up with the needs of clients, mobile devices and email access are necessary for adequate communication. Being up-to-date is necessary for the prudent practitioner. Well-organized e-mail, smart internet surfing, mobile devices and other portable devices can keep your life organized and balanced.

**3:00 Break**

**3:15 Estate Planning Update**  
Hopler

Obtain a summary of recent cases and changes to law impacting estate planning and the administration of a decedent's estate including POA and new tax laws.

**4:15 Adjourn**

\* Indicates portion providing Ethics/Professional Responsibility credit

† Indicates portion providing Substance Abuse/Mental Health credit

# PROGRAM DETAILS

## SPEAKERS

- **Benjamin Baldwin**, Robinson Bradshaw & Hinson PA, Charlotte
- **Amy L. Britt**, Cheshire Parker Schneider & Bryan PLLC, Raleigh
- **Doug Brocker**, The Brocker Law Firm, Raleigh
- **C. Patrick F. Brown**, Lawyers Mutual Liability Insurance Company of North Carolina, Cary
- **Dave Clement**, Smith Anderson Blount Dorsett Mitchell & Jernigan LLP, Raleigh
- **Matthew A. Cordell**, VF Corporation, Greensboro
- **Kearns Davis**, Brooks Pierce McLendon Humphrey & Leonard LLP, Greensboro
- **Damon Duncan**, Duncan Law, LLP, Greensboro
- **L. Cooper Harrell**, Mullins Duncan Harrell & Russell PLLC, Greensboro
- **Adam Hopler**, Hopler Wilms & Hannah, Durham
- **Amy P. Hunt**, Horack Talley Pharr & Lowndes PA, Charlotte
- **Elizabeth H. Johnson**, Wyrick Robbins Yates & Ponton LLP, Raleigh
- **Anna S. Mills**, Womble Bond Dickinson (U.S.) LLP, Charlotte
- **Sarah Nagae**, Nexen Pruet, PLLC, Raleigh
- **Jan E. Pritchett**, Schlosser & Pritchett, Greensboro
- **Kathleen R. Rodberg**, McGuire Wood & Bissette PA, Asheville
- **Whitney Waldenberg**, The Brocker Law Firm, Raleigh

## HOTEL INFORMATION

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

### Embassy Suites

201 Harrison Oaks Boulevard, Cary

- **Nightly Rate:** \$169 single/double
- **Reservations:** 919.677.1840 or [www.tinyurl.com/NCBA-Embassy](http://www.tinyurl.com/NCBA-Embassy)
- **Corporate Account Code:** 2691626

### TownePlace Suites by Marriott

120 Sage Commons Way, Cary

- **Nightly Rate:** \$114 studio queen with sleeper sofa (Sunday–Thursday)
- **Reservations:** 919.678.0005
- **Ask for the NCBA corporate rate.**

## SPECIAL ACCOMMODATIONS

NCBA makes every effort to ensure a quality learning experience. If you have dietary restrictions or need special accommodations, please contact us at least one (1) week prior to the program start date.

## CLE SCHOLARSHIPS

CLE scholarships are available. Contact Membership Services at 800.662.7407 or email Amy Kemple at [akemple@ncbar.org](mailto:akemple@ncbar.org) for more information.

We extend our sincere gratitude to all of the speakers who volunteer their time and expertise toward the goal of presenting an educational program of the highest quality.

## RELATED PUBLICATIONS

The following, related publications will be released in the upcoming months. Details will be available in the weeks prior to each release, then available online at [www.tinyurl.com/CLEBookstore](http://www.tinyurl.com/CLEBookstore).

### **North Carolina Fiduciary Litigation Manual**

Releasing November 9, 2018, in conjunction with the “Recent Developments in Fiduciary Litigation” CLE program.

- Managing Editor: Christian L. Perrin
- Summary: This brand new practice guide explores substantive legal issues, applicable rules, ethical considerations and claims that may arise in relation to the elective share, guardianship, estate and trust proceedings. Contents include invaluable practice tips, practical guidance through procedural nuances and potential pitfalls, and more than 75 fillable/editable forms.

### **Common Interest Communities in North Carolina, 2nd Edition**

Releasing February 15, 2019, at the “2019 Real Property Hot Topics” CLE program.

- Author: Brian S. Edlin
- Summary: Updates to this comprehensive resource reflect recent developments in the laws that govern NC common interest communities and hot topics that affect the 2 million North Carolinians who live in them. In addition to planned communities and condominiums, the book also delves into some of the more “exotic” forms of common interest communities, such as time shares and “dockominiums.”

### **The ABCs of Criminal Court, 2nd Edition**

Releasing March 15, 2019, in conjunction with the “ABCs of Criminal Court” CLE program.

- Authors: Chad D. Garrett & Sean M. Olson
- Summary: This essential pocket guide is newly updated and expanded to provide quick, in-court answers and references to relevant statutory authority pertaining to defenses, questions of proper opening and closing techniques, voir dire questions, evidentiary foundations and much more – one letter at a time.

### **Elements of Civil Causes of Action in North Carolina, 3rd Edition**

Releasing April 26, 2019, in conjunction with the “Elements of Civil Causes of Action in NC” CLE program.

- Author: Doug MacGregor
- Summary: Now in its 3rd edition, this bestseller breaks down 38 of the most common North Carolina civil causes of action into their component parts. Chapters are organized alphabetically by cause of action and are heavily annotated with pertinent citations to controlling authority.

## **BIANNUAL BOOK SALE | October 15–29, 2018**

Save 20 % on our entire catalog of top-quality deskbooks, manuals, program manuscripts and more, including new editions of the best-selling *NC Estate Administration Manual* and the *NC Bankruptcy Practice Manual*. Digital products are available for immediate download and all print books ship free!

Visit [www.nbar.org/CLEBookstore](http://www.nbar.org/CLEBookstore) to view our full catalog.

# REGISTER TODAY!

**Online:** [www.tinyurl.com/CLE690ARP](http://www.tinyurl.com/CLE690ARP) | **By phone:** 800.228.3402

**By mail:** Attn: Accounting-NCBA, 8000 Weston Parkway, Cary, NC 27513

## STEP 1: Tell us who you are. (Please print clearly.)

Print Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State and ZIP: \_\_\_\_\_

Daytime Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

NC State Bar No. (Required for MCLE Credit): \_\_\_\_\_

**STEP 2: Select your tuition rate.** (Register early and save 10%. Payment must be received three (3) weeks prior to program date to qualify for the early rate.)

**Standard Rate:**  \$650 /  \$585 *Early*

**NCBA Member:**  \$540 /  \$485 *Early*

**CLE Premier Pass:**  \$0

## STEP 3: Select your learning format.

Live (690ARP)    Webcast (690LWC)    Video Replay (See below.)

Video Replay registration (if selected).

Video Replays are scheduled for this program. The agenda may not include certain breakouts/tracks shown at the original program. For a list of dates and locations visit [www.tinyurl.com/CLE690ARP](http://www.tinyurl.com/CLE690ARP) and indicate your choice below.

Location: \_\_\_\_\_ Date: \_\_\_\_\_ Code: \_\_\_\_\_

## STEP 4: Complete your payment information.

(Registration is complete only after payment is processed. Please print clearly.)

I am registering for this program at the tuition rate checked above.

Enclosed is a check, payable to NCBA.    Please charge my credit card.

Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Total Amount: \_\_\_\_\_ Signature: \_\_\_\_\_

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Discounts may be available for NCBA members who are students, law professors, judges or legal services/public interest attorneys. Call CLE at 800.228.3402 for details.

# NCBA

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## NCBA 2018 Annual Review

NCBA is an accredited CLE sponsor under the MCLE regulations promulgated by the North Carolina State Bar Board of Continuing Legal Education.

### INTRODUCING...

# premier pass

The 2018-2019 CLE Premier Pass is  
an exclusive NCBA member benefit  
**providing unlimited CLE**  
including access to hundreds of  
On Demand programs.

[www.tinyurl.com/PremierPass](http://www.tinyurl.com/PremierPass)

**REGISTRATION:** All registrations are processed after payment is received. To qualify for the early tuition rate, payment must be received prior to the deadline indicated. Stated early discount rate percentage is approximate. Registrations may be capped based on venue size and may include an overflow room with additional seating. **CHANGES TO EXISTING REGISTRATIONS:** Should an attendee need to cancel his or her registration to a Live, Webcast or Video Replay program, the cancellation request must be received by 9:00a ET one (1) week prior to the start of the program to receive a full refund. Any attendee requesting cancellation less than one week prior to the program will receive a refund, less a \$75 administrative fee. An attendee may choose to transfer his or her registration at a program to the Live, Webcast or Video Replay format of the same program only. Transfer requests must be received by 9:00a ET one (1) business day prior to the program start date. An attendee may further choose to substitute his or her registration to a Live or Video Replay program only. Substitution means sending another person to attend the Live or Video Replay program when the original registrant is unable to attend. Substitution requests must be received by 9:00a ET one (1) week prior to the program start date. The substituted person may be assessed a different fee based on their NCBA membership classification. Cancellation, transfer and substitution requests must be provided in writing by email at [askcle@ncbar.org](mailto:askcle@ncbar.org) or by calling 800.228.3402. If an attendee misses any portion of a program, that portion is not subject to substitution, refund or transfer. Except as provided herein, registrations including On Demand registrations, cannot be cancelled, substituted or transferred once purchased. **NO-SHOWS:** Anyone who is registered for a program, including CLE Premier Pass holders, but does not check in is considered a no-show. No-shows are not issued a refund, and Premier Pass holders will be assessed a \$75 administrative fee. These registrants will receive the digital materials, available in their online accounts, in full consideration of tuition paid. **MISCELLANEOUS:** The NCBA reserves the right to cancel or reschedule programs at any time. Should the NCBA cancel or reschedule a program, registrants may elect to receive a full refund or attend the newly scheduled program. Notifications regarding program changes will be sent to the email address on file. The NCBA is not responsible for any additional expenses incurred as a result of such cancellation or rescheduling. Each attorney must maintain a record of his or her attendance for the NC State Bar Annual Report. MCLE credit is reported by the NCBA only if a NC State Bar number is provided. Registration and attendance at NCBA CLE programs constitutes an agreement by the registrant with the NCBA for use and distribution of the attendee's image or voice in photographs, videotapes, electronic reproductions and audiotapes of such programs and activities. Unless specified, spouses or guests are not eligible to attend NCBA CLE programs and activities without registering to attend. These terms are subject to change.