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## **REGION 4**

### **WINTER NEWSLETTER**

**January 2011**

Happy New Year! I hope everyone had a wonderful holiday season. Now that it's over, it's time to settle back down and get busy! Have you registered for Tulsa yet? If not, there's still time. Additionally, NALS has partnered with American Airlines and Delta Airlines in an effort to help its members save a little on airfare out to Tulsa. Check out the NALS website for complete information.

I have quite a lot of little things to tie up in the way of getting some new (and possibly some old!) information out to Region 4 members.

Congratulations to the following Region 4 members:

Kristi Skipper, PP, PLS (Montgomery ALS) for winning the first Region 4 Think Big! drawing!

Mary Jo Denman, PP, PLS (NALS of Atlanta) for being chosen as the 2010 Award of Excellence Recipient!

Vickie Hellmer, PLS (NALS of Nashville) for recruiting five new members! Vickie's national dues have been waived for one year!

Meredith Lazarski, ACP (Hilton Head Legal Staff Professionals) for winning the second Region 4 Think Big! drawing!

Additionally, one lucky member from each of Alabama, Florida, Georgia, South Carolina, and Tennessee each received a free registration to Tulsa!

Don't forget Region 4 is headed to the beach for some fun in the sun July 22 – 24, 2011 for the Region 4 Conference! Inside is hotel information. If you would like to help plan this year's conference, please let me know. Kathie Amirante, PP, PLS, NALS 2011-2012 President will be our guest! Make sure to make your hotel reservations early and I'll see you at the beach!

*Lisa Mitchum, PLS*

## **Congratulations to the NALS 2011-2012 Board of Directors**

President-elect

**Helene L. Wood, PP, PLS, TSC (TX)**

Secretary/Treasurer

**Doris T. Compton, PP, PLS (AR)**

Certification Director

**Jeannie Shaw, PP, PLS (MS)**

Education Director

**Karen McElroy, PP, PLS (AZ)**

Marketing Director

**Brynne Williamson, PP, PLS (WA)**

Membership Director

**Tina Boone, PLS (TN)**

Region 1 Director

**Antoinette VanSchaick, PP, PLS (NY)**

Region 2 Director

**Rita Ann Gilson, PP, PLS (PA)**

Region 3 Director

**Barbara Stone, PP, PLS (MI)**

Region 4 Director

**Lisa Mitchum, PLS (GA)**

Region 5 Director

**Renee Kleinjan, PLS (MN)**

Region 6 Director

**Reba Peden, PP, PLS (MS)**

Region 7 Director

**Mariann Fletcher, PLS (WA)**

Region 8 Director

**Kathy Sieckman, PP, PLS, CLA (AZ)**

Also joining the 2011-12 Board will be

President

**Kathleen Amirante, PP, PLS (MI)**

Immediate Past President

**Patricia E. Infanti, PP, PLS (PA)**

Foundation Chair

**Julie A. Abernathy, PP, PLS (TX)**

Executive Director

**Tammy Hailey, CAE**

Newly elected board members will be sworn in to office at the 2011 Professional Development & Education Conference held in Tulsa, Oklahoma.

## Region 4 Meeting Recap

### Branson, Missouri

At the Region 4 meeting in Branson, the members decided to award each state in Region 4 one early bird registration to the 2011 Professional Development & Education Conference in Tulsa, OK. Each state association (AL, GA, SC, TN) has been given a check in the amount of \$239 and it is up to each individual state to determine who will be the recipient. The Florida and North Carolina recipients will be determined by a drawing. Region 4 also made a supplemental donation in the amount of \$500 to the NALS Foundation.

The 2011 Region 4 Conference will be held July 22 – July 24, 2011 at the Sandestin Golf and Beach Resort in Destin, Florida ([www.sandestin.com](http://www.sandestin.com)). The resort is “all-inclusive” and features 30 restaurants/shops on-site and 7 miles of beach/bay front; 15 tennis courts; 19 swimming pools; golf, numerous outdoor activities (some of which are complimentary with our stay), including nature trails, and complimentary resort transportation. The cost per night is \$149 and this rate will be available three days pre/post conference. The resort is 25 miles from the NW FL Regional Airport, and about a 5 to 6 hour drive from Atlanta.

The 2011 NALS 60<sup>th</sup> Annual Education Conference and National Forum will be held in Cincinnati, Ohio from October 13 – 16, 2011. This conference will offer 20 hours of CLE, 43 sessions to choose from and four days of networking! Stay tuned to [www.NALS.org](http://www.NALS.org) for more information.

Beginning in January 2011, NALS will be offering one free webinar each month to its members. This is a value of over \$350 in free CLE! Free webinar sessions will not only include leadership sessions, but substantive law sessions as well. The substantive law sessions will include CLE sessions in the areas of: Litigation/Civil Law, Corporate Law, Estate Planning/Family Law, and General Law/Professional Development. The sessions in Cincinnati will follow this same track of CLE.

## en • gage | en'gāj |

- 1 [trans.] occupy, attract, or involve (someone's) interest or attention : *NALS offers programs to engage members in their careers helping them advance in life.*
  - (engage someone in) cause someone to become involved in
  - arrange to employ or hire (someone) : *He was engaged as a paralegal.*
  - dated reserve (accommodations, a place, etc.) in advance: *She had engaged the Online Learning Center.*
- 2 [intrans.] (engage in) participate or become involved in : *NALS members engage in a variety of activities.*
  - (be engaged in) *Some are actively engaged in leadership.*
  - (engage with) establish a meaningful contact or connection with : *New members can engage with local leaders in their profession.*
  - (of a part of a machine or engine) move into position so as to come into operation: *Your career will engage.*

## 2011 will bring you more opportunities to engage in NALS and your career.

- More CLE for your money.
- Online information at your finger tips.
- More CLE than you have ever seen at a conference.
- More active in social media.
- Area of law focused education.
- The same support you have grown to love.

[www.nals.org](http://www.nals.org)



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## Join Region 4 at the beach in 2011!

- WHAT?** Region 4 Conference
- WHEN?** July 22 - 24, 2011
- WHERE?** Sandestin Golf and Beach Resort, Destin Florida  
[www.sandestin.com](http://www.sandestin.com)
- RATE?** \$149/night (11.5% tax). This rate allows you free access to resort transportation and entitles you to complimentary use of the fitness center, 2 bicycles for 4 hours and one hour of boogie board, kayak and/or canoe fun daily and an hour of tennis court time daily (based on availability). Complimentary WiFi in the Conference Center and complimentary internet access in the guestrooms. Other available activities: 2 holes of golf, children's activities, marina, day spa and salon, fishing, and scuba diving.

**Room cutoff is JUNE 15, 2011.**

**MAKE YOUR PLANS TO ATTEND NOW!**

# NALS OFFERS MORE EDUCATION THAN YOU CAN IMAGINE!

NALS listened and made significant adjustments in the amount of education offered to members. The schedule for the 2011 Educational Conference in Cincinnati has been changed based on research conducted by the NALS Think Tank. This research focused on what you, the members, want, as well as what the industry requires (see the following article “What Have We Learned About You?”). NALS is increasing the number of CLE hours available in Cincinnati next October by offering education in four core areas of law identified by the Think Tank’s research:

Litigation/Civil Law  
Corporate Law  
Estate Planning/Family Law  
General Law

This change will increase the potential for your law firms to cover your costs based on the significant increased number of CLE hours offered specifically in your area of law. Start planning now for the 2011 NALS Education Conference at the Hyatt Regency Cincinnati on October 12-16, 2011. When NALS’ members speak—NALS listens!

## in • spire | in<sup>l</sup>spīr |

- 1 fill (someone) with the urge or ability to do or feel something, esp. to do something creative : [trans.] *His passion for justice inspired him to advance his career as a paralegal with NALS.*
- create (a feeling, esp. a positive one) in a person : *Their enthusiasm inspires those around them.*
  - (inspire someone with) animate someone with (such a feeling) : *She inspired her co-workers to become certified with NALS.*
  - give rise to : *The conference was successful enough to inspire people to register for the next one.*

## More than 80 years of inspiring legal professionals will continue.

- Specialty specific education to broaden your knowledge.
- Online networking and communities for support.
- Two national conferences each year for a personal touch.
- Local and state chapters to keep you inspired.
- Three certifications to advance your career.
- Full-time professional staff to answer your questions.

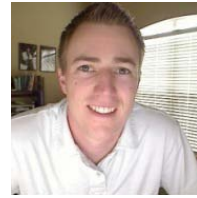
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## What Have We Learned About You?

*By Jay Moore, NALS Communications Manager*



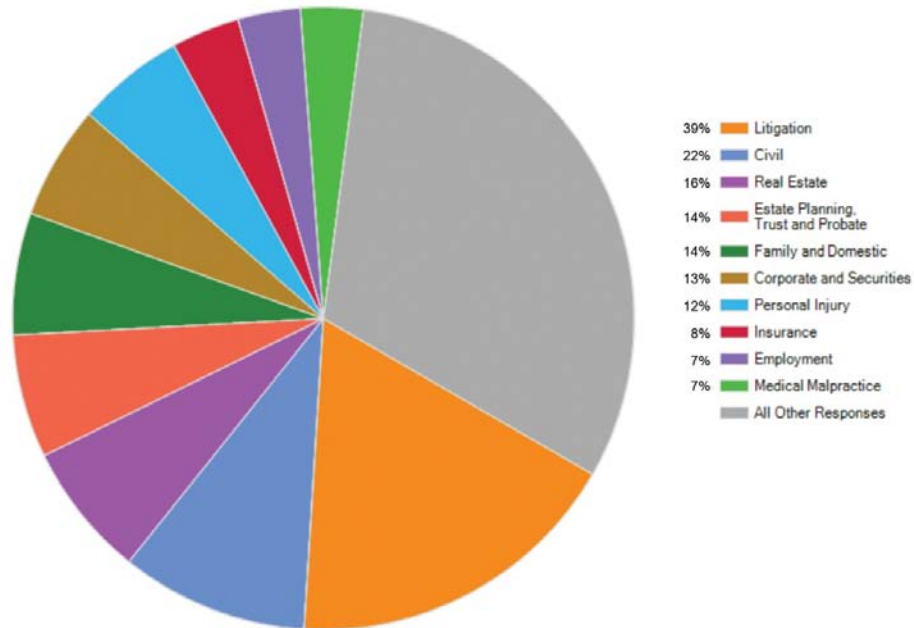
As many of you know, NALS...the association for legal professionals has put together a Think Tank of individuals to evaluate the association and the profession to ensure that the two are aligned in the most efficient way possible. As part of the process, NALS seeks to learn what you want from it and will adjust its programs so you are getting the most out of your membership.

Recently, the NALS Think Tank surveyed 500 legal professionals online to gather information about their careers and involvement in professional associations. NALS is already using these findings to move forward by offering more CLE sessions included in your dues and increased CLE opportunities at the 2011 NALS Education Conference and National Forum. It is also focusing these additional CLE sessions on the areas of law in which you work. NALS will begin offering CLE tracks focused on the areas of law that were proven to be the most applicable to our membership and the industry.

We were able to narrow the fields of law to four general areas, with additional sub-areas that are more specific. The idea is not to have a group for each and every area of law, as we would not be able to efficiently service each of those groups in a way that would be beneficial to you. Instead, the idea is to give the NALS Education Committee some guidance and focus on the legal areas in which many of you work. NALS' programs will offer more specific and targeted education with a greater impact on your career. The broad areas of law that we will be focusing on are: Civil Litigation, Corporate Law, Estate Planning/Family Law, and General Practice.

The results of our survey showed that nearly 40% of respondents worked in litigation, with another 20% working in civil law. By grouping the areas of law that fall under corporate focus, we are targeting another 34% of respondents. Estate planning and family law areas, which have been grouped together, made up another 51%. The remaining specialty areas of law were added to a general practice group, allowing NALS the flexibility to offer education in many other areas of interest. Note that in designing the survey, we were aware that many legal professionals work in more than one area of law and so we allowed respondents to select multiple responses. This is why the results total more than 100%.

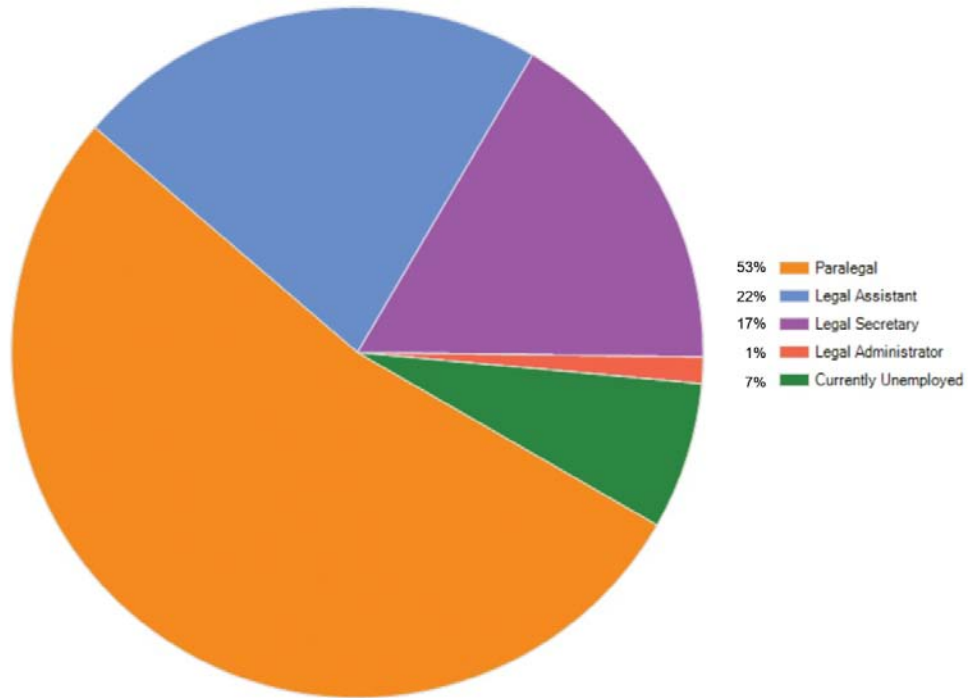
Identify the specialty area of law you work in the most. You may select more than one but please try to limit your responses to those you value the most.



A resounding 82% of respondents told us they value a professional association's relation to their profession and career. Approximately 60% responded that the number one thing they looked for in an association was overall education value. These overwhelming responses indicate to us that combining a greater education value with focused career-enhancing topics will result in a greater benefit from NALS membership dues.

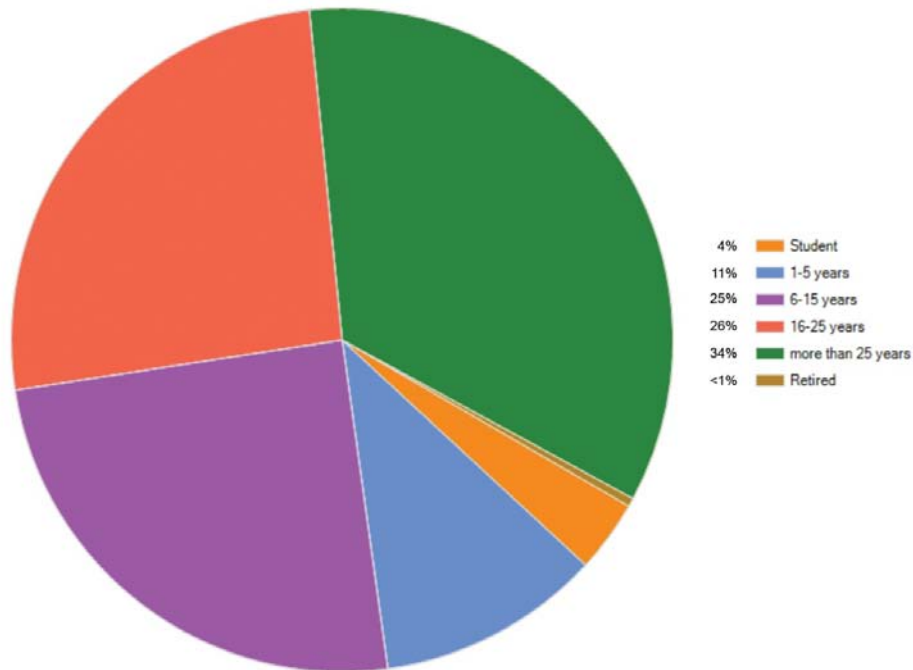
When surveying the job titles of the respondents, we learned that 53% were paralegals, 23% were legal assistants, and 17% were legal secretaries. One area of concern was the 6% of respondents who are currently unemployed. NALS will continue to assist those that are unemployed through the NALS Career Center ([careers.nals.org](http://careers.nals.org)) and will continue to offer the dues waiver for those members who are unemployed at the time of their renewal. NALS understands the tough economic times and we will do everything that we can to assist our members who may be struggling.

What is your current job title?



We were happy to learn that nearly 35% of respondents have been in the legal field for more than 25 years, which shows how dedicated you are to your careers. We also learned that 60% volunteer for local or national charitable organizations, which tells us that you are interested in making a difference in your communities. NALS will continue to foster relationships with national charities to help provide you with opportunities to provide an impact on society.

How long have you been in the legal field?



The NALS Think Tank will continue to monitor the industry and recommend areas of improvement for the association. If you have any recommendations, please send an email to [thinktank@nals.org](mailto:thinktank@nals.org). We will review your message and see what we can do to investigate further ways we can better serve you.

## en • hance | en'hans |

[trans.] intensify, increase, or further improve the quality, value, or extent of :  
*Her dedication and involvement will enhance her career. [Continuing legal education enhances the value of employees.*

### Enhance your career with education and certifications that fit your needs.

- Online CLE focused on practice areas.
- Three certifications to advance your career.
- Website access to a library of articles and resources.
- Conference schedules built around your specialities.
- Online communities of experienced legal professionals.
- Career Center linked to other legal associations.

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# WELCOME TO REGION 4!



Angela Andrews, AL Member at Large

Tiffany Barnes, Mobile LPA

Ashley Battles, VA College at Mobile

Melissa Bouvier, Baldwin County ALP

Amber Calloway, Mobile LPA

December Casey, Mobile LPA

Katie Cayton, Mobile LPA

Cody Eubanks, Mobile LPA

Michele Potter, Mobile LPA

Krystal Richardson, VA College at Mobile

Paige Sanchez, Mobile LPA

Kimberly Scott, VA College at Mobile

Brenda Sollie, Birmingham LSA

Teresa Stephens, MALS

Leigh Urbanek, Baldwin County ALP

April Williams, MALS

Barry Yzaguirre, Mobile LPA



Jenny Esdaille, Florida Member at Large

Rukia Riley, Florida Member at Large



Katie Albright, NALS of Atlanta

Gail McCarty, Cobb County LPA

Diana Atkinson, NALS of Atlanta

Patricia Olvera, Cobb County LPA

Catherine Howard, NALS of Atlanta

Leslyn Taitt, Cobb County LPA

Tonya Justice, NALS of Atlanta

Marites Redding, Cobb County LPA

Rashida Sheffield, NALS of Atlanta

Stacie Reichard, Cobb County LPA

Heather Shively, NALS of Atlanta

Yolanda Rodriguez, Cobb County LPA

Lindsey Daniels, Cobb County LPA

Melinda Sullivan, Cobb County LPA

Dana Gerlach, Cobb County LPA

Monico Sullivan, Cobb County LPA

Kathryn Loveland, Cobb County LPA



Tina Barber, North Carolina Member at Large



Cathy Boggs, LSP of Greenville

Andrea Egan, LSP of the Lowcountry

Vickie Halstead, LSP of Greenville

Heather Hines, SC Member at Large

Ann Marie Minerva, LSP of Greenville

Susan Morosko, LSP of the Lowcountry

Gina Noble, Hilton Head SP

Debra Rogers, SC Member at Large

Lynn Wener, LSP of the Lowcountry



Brandi Caruthers, NSCC Student Chapter

Kimberly Compton, MLSA LP of Memphis

Debra Dorio, NSCC Student Chapter

Stephanie Farmer, NSCC Student Chapter

Rodney Ford, NSCC Student Chapter

Vickie Hardiman, NSCC Student Chapter

Adam Jackson, NSCC Student Chapter

Barbara Johnson, NSCC Student Chapter

Marilyn Jones, NSCC Student Chapter

Erin Keegan, Knoxville ALP

Paula Merriweather, MLSA LP of Memphis

Monica Pearson, NSCC Student Chapter

Michelle Sims, NSCC Student Chapter

Patricia Smith, Nashville NALS

Mollie Slaybaugh, Williamson County LP

Starbabe Thomas, NSCC Student Chapter

Semra Triplett, NSCC Student Chapter

Edmund Turnley, NSCC Student Chapter

Katherine Watts, NSCC Student Chapter

Catherine Weir, NSCC Student Chapter

Bernadeen Williams, NSCC Student Chapter



## Nashville State Community College Starts a New NALS Student Chapter!

Vickie Hellmer, PLS, Nanette Green, PLS, Delone Anderson, PLS, and Donice Alford, PP, PLS, were ALL actively engaged in this process! Vickie and Delone also accompanied Donice Alford to ITT College to make the next presentation. The students and their teacher attended the seminar portion of the meeting and were very interested and the Nashville Chapter gained a member from one of those students, who aren't quite ready to start the chapter process yet. Pictured above are some of the NSCC Student Members, along with some of the Nashville Chapter members, who were present when NSCC received their charter. Officers of NSCC are as follows:

Adam Jackson, Chapter President  
 Watts, Katherine Watts, Chapter President-Elect  
 Stephanie Farmer, Chapter Secretary  
 Brandi Caruthers, Chapter Treasurer  
 Michelle L. Sims, Chapter Governance Chair

CONGRATULATIONS TO NSCC ON YOUR DECISION TO JOIN NALS!

**pro • mote** | prə'mōt |

- 1 further the progress of (something, esp. a cause, venture, or aim) ; support or actively encourage : *Speciality area education helps promote advancement.*
  - give publicity to (a product, organization, or venture) so as to increase sales or public awareness : *The NALS docket is used to promote NALS members and their accomplishments.*
  - chemistry act as a promoter of (a catalyst).
- 2 (often be promoted) advance or raise (someone) to a higher position or rank : *She was promoted to senior paralegal after she was certified by NALS.*

Get help in promoting  
yourself by being a part  
of something greater.

- More than 80 years of serving legal professionals.
- Three certifications to help get that promotion.
- Leadership opportunities.
- Professional and personal development focused.
- Build your network of legal professionals.
- Career Center linked to other legal associations.

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NALS President-elect  
Kathleen R. Amirante, PP, PLS

Continues to Challenge **YOU** to



and join the 2011-2012 Leadership Team!

**THINK BIG!** Be part of the 2011-2012 NALS Leadership Team and take an active role in leadership service. No prior experience is necessary! Participation on a NALS committee will enhance your personal goals and professional growth, plus give you a clearer understanding of the inner workings of NALS.

Most of the NALS committees hold monthly meetings in the NALS Online Learning Center and communicate with each other via e-mail, an economical and “green” way to function as a committee. Though not mandatory, the national committees are encouraged to meet at the Professional Development Conference in March (March 10-12, 2011) and at the National Forum in Cincinnati, Ohio (October 13-16, 2011).

It is thrilling and exciting to be part of the NALS Leadership Team. You will have FUN getting to know other NALS members from around the country and will gain a sense of pride and accomplishment seeing your work come to fruition. **Accept the challenge to make a difference!**

@Law: This committee oversees the publication of NALS’ quarterly magazine and the monthly publication, e-Learn@NALs, a part of The NALS docket. The committee’s responsibilities include identifying and securing suitable authors for articles, proofreading articles, proofreading full magazine text, and preparing monthly editions of e-Learn@NALs.

Certifying Board: This committee consists of at least nine NALS members who serve for at least two years and who must be a PP or PLS in good standing. Two non-NALS members also serve on the Certifying Board. Although a PLS may fall under the category of “voluntary recertification,” she or he must recertify in order to serve on the Certifying Board. In order to receive exam-related training (including statistics and exam preparation), it is imperative that during the two-year term Certifying Board members are available to attend each Professional Development conference held in Tulsa in March. Members of the Certifying Board are prevented from teaching any subject related to the certification exams while on the Certifying Board and for two years after their term expires. The Certifying Board is responsible for all issues directly related to the certification exams.

Education: This committee provides educational programs for NALS members, including legal training courses and certification study materials. There are two subcommittees that fall under the Education Committee umbrella: (1) the Education Products subcommittee is responsible for preparing and updating Mock Exams and Resource Manuals for various NALS certifications; and (2) the WebEd subcommittee is responsible for the topics and speakers for NALS webinar programs throughout the year. Some of the projects the Education Committee is responsible for include: arranging for education and professional development track sessions and speakers at the Professional Development Conference; arranging for education speakers at the National Forum; coordinating the Online Learning Center topics and the Online Study Group, as well as the NALS CLE Award, and Basic and Advanced Legal Training Courses.

Future Leader Development: This committee is in its second year and its responsibilities include providing seminars and programs via webinars, the Online Learning Center, or other venues specifically geared toward instructing and cultivating the future leaders of NALS.

Marketing: This committee is responsible for coordinating The NALS docket. This electronic magazine-style newsletter includes information about topics covered on legal blogs and twitter, along with industry related articles and association news directly from the Resource Center Staff! E-Learn and Leading the Way are now part of The NALS docket. Marketing also coordinates E-News, the weekly newsletter sent to NALS members via email. Promotion of the various NALS programs is key. The Marketing Committee assists with the promotion of the NALS Award of Excellence, sponsors the Jett Awards, which showcase state and chapter achievements, promotes the professional development and national forum conferences, and is responsible for the NALS marketing blog and other programs to promote public awareness of NALS.

Membership: This committee's responsibilities include assisting state and local membership chairs in recruitment and retention of NALS members. The Membership Committee promotes membership in this multi-level association, prepares and reviews all membership brochures and materials, promotes student membership, and promotes diversity in the membership of NALS. New to the Membership Committee is the Young Leader Professional subcommittee which tackles the issues and concerns of the young professional in the legal industry.

Regulation/Certification Committee: This committee monitors regulatory activity across the country and keeps NALS members up to date on what various states are doing in the regulation arena. Regulatory activity means either state legislation or rules proposed or adopted by state bar associations or state courts that would regulate how legal support professionals do their jobs, and in some instances who may work in a position with a certain title, such as paralegal.

Text Development: This committee is responsible for drafting, reviewing, and revising the Basic Manual for the Lawyer's Assistant, the Advanced Manual for the Lawyer's Assistant, and accompanying workbook materials and instructor's materials.

**NALS Foundation Board of Trustees:** The NALS Foundation is an educational foundation dedicated to improving the value of the legal professional through education, research, and other activities. Foundation trustees are responsible for internal and external fundraising and developing collaborative support for its programs. The NALS Foundation funds keynote speakers at educational conferences, awards grants to chapters, states, and regions, and sponsors the Scales of Justice Awards.

The NALS President does not appoint the Foundation Trustees; they are appointed by the Foundation Chair. If you are interested in serving on the Foundation, we will notify the Foundation Chair of your interest.



**NALS LEADERSHIP  
COMMITTEE PREFERENCE  
2011-2012**

**Sign Up Today!**

**Yes, I want to THINK BIG! and join the 2011-2012 NALS Leadership Team!**

1	2	3	Committee
			@Law
			Certifying Board
			Education
			Future Leader Development
			Marketing

1	2	3	Committee
			Membership
			Regulation/Certification
			Text Development
			NALS Foundation, please forward my interest to the Foundation

*(Please indicate your first, second, and third choice.)*

Name \_\_\_\_\_  
 Chapter/State \_\_\_\_\_  
 Preferred Mailing Address \_\_\_\_\_  
 Work Telephone \_\_\_\_\_ Home Telephone \_\_\_\_\_  
 Cell Phone \_\_\_\_\_  
 Home Email Address \_\_\_\_\_  
 Work Email Address \_\_\_\_\_

(Mark \* as Preferred Email)

List your certifications: \_\_\_\_\_  
 Do you consider yourself "technologically savvy"? \_\_\_\_\_

While not mandatory, attendance at the Committee Orientation on March 10, 2011, is encouraged. You'll meet with your fellow committee members and set the agenda and calendar for your year on the committee. You will also have a LOT OF FUN! Will you be able to attend this meeting? (Yes or No) \_\_\_\_\_

Please return your completed committee preference form to:

Kathleen R. Amirante, PP, PLS  
 Kitch Drutchas Wagner Valitutti & Sherbrook  
 2379 Woodlake Drive, Suite 400  
 Okemos, MI 48864-6032  
 Email: [k.amirante@kitch.com](mailto:k.amirante@kitch.com) (W)  
       kathiepls@comcast.net (H)  
 Phone: (517) 381-4426 (W)  
       (517) 882-6682 (H)  
       (517) 303-3408 (C)

*Join me on the NALS Leadership Team! I look forward to working with YOU.*



## *Schedule*

### **Thursday, March 10**

8:00a.m. – 5:00p.m.

#### **Certification Testing**

1:30p.m. – 3:00p.m.

#### **All Committee Orientation**

3:00p.m. – 6:00p.m.

#### **Committee Meetings**

9:00p.m. – 10:00p.m.

#### **Young Legal Professional Reception**

### **Friday, March 11**

7:30a.m. – 4:00p.m.

#### **Registration**

7:30a.m. – 10:00a.m.

#### **Coffee Break**

8:00a.m. – 9:30a.m.

#### **Opening Keynote Speaker – The Leader in You**

*By Betsy Ringer*

We are all leaders. You influence people every day whether you own the title of LEADER or not. This session sets the pace for your conference as you examine how you:

1. Lead Yourself
  - Discover your personality and leadership style
  - Shift from Surviving to Thriving
2. Lead Others

- Identify your powerful sphere of influence

3. Lead Up

- Communicate effectively with your boss

You will laugh, engage in eye-opening exercises, and leave energized to live intentionally and make a difference.

10:00a.m. – 11:00a.m.

#### **Joint Leadership Session**

10:00a.m. – 11:00a.m.

#### **What is the Fair Credit Reporting Act & How Does it Apply to You?**

*By Larry Henry, Esq.*

This session will outline this critical but little known law that impacts your clients as well as attorneys. The FCRA covers far more than credit transactions.

10:00a.m. – 11:00a.m.

#### **Becoming the Speaker You Want to Be – Public Speaking Do's and Don'ts**

*By Peggy Sullivan, PP, PLS*

Does the thought of having to make a speech or presentation make you want to run to the nearest door? During this presentation, we will cover some suggestions on what makes a good and confident speaker as well as things that you want to avoid while speaking.

11:15a.m. – 11:45a.m.

#### **Regional Meetings**

Noon – 1:15p.m.

**Networking Lunch**

1:30p.m. – 2:30p.m.

**State & Local Presidents Training**

1:30p.m. – 2:30p.m.

**An Update on *Brady vs. Maryland* – The Michael Behenna Story**

*By Vicki Behenna, Esq.*

A prosecutor's responsibility to provide favorable evidence to the defense, and the effects of what happens when a prosecutor fails to fulfill his/her constitutional obligation to disclose such evidence.

1:30p.m. – 2:30p.m.

**What's New in the Gregg Reference Manual?**

*By Mary Baldechhi, PP, PLS*

The Tribute (11th) edition of the Gregg Reference Manual is the resource for the NALS certification exams as of the September 2010 exams. In this presentation, we will look at its new features and highlight some rules that might be new to you or that you may have forgotten. In addition to topics such as punctuation, capitalization, and numbers, it also includes chapters on proofreading, letter formats, e-mail, and text messages.

1:30p.m. – 2:30p.m.

**Corporate Sponsor Session – Avery**

*By Karl Schoen*

3:00p.m. – 4:00p.m.

**Membership Chair Training**

3:00p.m. – 4:00p.m.

**Joint Leadership Session**

3:00p.m. – 4:00p.m.

**A Beginner's Guide to the Upside Down World of Indian Law**

*By Stephen R. Ward, Esq.*

This session will include an overview of the history and development of federal Indian law, including an introduction to Indian country

jurisdiction, Indian lands law, tribal sovereign immunity, trust property, and other key principles of Indian law.

3:00p.m. – 4:00p.m.

**Reaching Middle Ground – Practical Pointers for Past, Current and Future Leaders**

*By the Future Leaders Development Committee*

The leaders of tomorrow must work with current and past leaders, as well as a multi-generational membership. Are you comfortable giving instructions or delegating to others regardless of their age or prior position? Can you help past leaders remain of value while supporting the current leadership's mission to Think Big? How will you bridge the gap between "the way we've always done it" and new and innovative programs? In this session, you will learn the middle meeting points in leading—from learning to let go, to learning how to take over the reins!

4:30p.m. – 6:00p.m.

**Installation and President's Reception**

6:00p.m. – 7:00p.m.

**Resource Center Tours**

**Saturday, March 12**

8:00a.m. – 3:00p.m.

**Registration**

8:00a.m. – 10:00a.m.

**Coffee Break**

8:30a.m. – Noon

**State & Local President's Training – NALS University**

8:30a.m. – 2:30p.m.

**Membership Chair Training**

8:30a.m. – 10:30a.m.

**The Power of Microsoft Office**

*By Darrell Newcomb*

Learn how Microsoft Outlook's advanced features can improve the way you manage your

time and communications and PowerPoint tips and tricks to a great looking presentation.

8:30a.m. – 10:30a.m.

**Efficiency 101 – How to Become Profit and Not Overhead**

*By Ruth Schaub, PP, PLS*

Worried about how to stand out during tough economic times? Become the employee no boss can be without. Learn how to work smarter and not harder. It is easier than you think.

11:00a.m. – Noon

**Military Disability Law and How it Interacts with Social Security, ERISA and Private Disability Policies**

*By Amy Hart, Esq.*

Military disability has changed greatly in recent years. We will discuss how injured military members are processed through the military's disability retirement program. We will also discuss how the military's disability process interacts with Social Security, ERISA, private disability policies, and briefly touch on its importance in family law settings and tax implications.

11:00a.m. – Noon

**Taking Advantage of Generational Gaps to Succeed at Work and in NALS**

*By Audrey Saxton & Kathy Johnston*

Whether new or old to the legal field and/or your NALS experience, there is a lot to be said about taking advantage of and enjoying the differences that might present themselves day-to-day. This two-person panel, comprised of a relatively new legal professional and NALS member and a more seasoned legal professional and NALS member, will help you learn to bridge the gap and use the strengths brought by each generation to be a success at work and in NALS.

Noon – 1:15p.m.

**Recognition Luncheon**

1:30p.m. – 2:45p.m.

**State President's Training**

1:30p.m. – 2:45p.m.

**Local President's Training**

1:30p.m. – 2:30p.m.

**On the Road with the 4th Amendment**

*By Judge Thomas Gillert*

The impact of *Arizona v. Gant*. Recent developments with consents to search (consensual encounters).

1:30p.m. – 2:30p.m.

**Connecting People**

*By Dustin Holt*

Overview of technology and smart phone devices.

3:00p.m. – 4:00p.m.

**NALS Foundation Jett Awards – Founder's Award Presentation**

3:00p.m. – 4:00p.m.

**SOS – Sticky Office Situations**

*By Sharon Gallagher*

Conflict shows up in the office every day. Are you skilled in knowing when an issue must be addressed? Are you comfortable in dealing with differences in style, personality types? Do you know the right thing to say, the best time and place to open a difficult conversation? This practical, interactive session will allow you to safely explore new and/or different, more effective ways of dealing with everyday conflict at work.

3:00p.m. – 4:00p.m.

**Corporate Sponsor Session – Avansic**

*By Dr. Gavin Manes*

4:30p.m. – 5:30p.m.

**Closing & Wrap-up**

7:00p.m. – 10:00p.m.

**Networking Dinner**

# think big. | NALS Professional Development & Education Conference

Tulsa, Oklahoma • March 11-13, 2011

## Registration Form

Member Number \_\_\_\_\_

Last Name \_\_\_\_\_

First Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Business Phone \_\_\_\_\_

Fax Number \_\_\_\_\_

E-Mail \_\_\_\_\_

Will this be your first NALS National Conference?  Yes  No

## Badge Information

Name as you want it to appear on the badge \_\_\_\_\_

### Certifications:

- ALS  PLS  PP  
 CLA  CLAS  CPS  
 RP  Other \_\_\_\_\_

NALS Office Held \_\_\_\_\_

*(please specify National, State, Local - Only one title can be used)*

## Registration Fees

### Early Bird (postmarked before December 1, 2010)

- Life Member\* \$229  
 Member \$239  
 Non-member *(includes one-year membership)* \$329

### Regular (postmarked before January 15, 2011)

- Life Member\* \$239  
 Member \$279  
 Non-member *(includes one-year membership)* \$379

### Late (received after January 15, 2011)

- Life Member\* \$279  
 Member \$319  
 Non-member *(includes one-year membership)* \$419

- Daily Registration (for CLE only) \$155

### Special Ticketed Event

- Networking Dinner \$45  
 Certification Cram Session \$99

*\*Life member - discount is included in the price listed. Fee does not include Special Ticketed Events*

## Guest Registration

Guest Name as it should appear on the badge \_\_\_\_\_

- Guest Registration \$95  
*(includes lunches and Friday night reception)*

### Special Ticketed Event

- Networking Dinner \$45  
*(guest must be registered to attend the Special Ticketed Event)*

## Method of Payment

Total amount due \_\_\_\_\_

Please Check One:

- Enclosed Check # \_\_\_\_\_

Charge to the following card:

- Visa  MasterCard  Discover

Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Signature (credit card registrants only) \_\_\_\_\_

Please print cardholder's name \_\_\_\_\_

Payment must accompany registration form. Please DO NOT mail the original form if faxing or registering online with a credit card payment. A \$20 handling fee will be assessed for returned checks. NALS reserves the right to change speakers or modify program content.

Refunds will be given minus a \$25 processing fee through February 1, 2011. **NO REFUNDS WILL BE GIVEN AFTER FEBRUARY 1, 2011.**

### PLEASE RETURN PAYMENT AND COMPLETED FORM TO:

NALS Resource Center  
8159 East 41st Street  
Tulsa, OK 74145  
or fax credit card payment to: (918) 582-5907  
or register online at: [www.nals.org](http://www.nals.org) under "Meet"

Please notify the NALS Resource Center (918-582-5188 or [info@nals.org](mailto:info@nals.org)) of any dietary or physical restrictions you may have so that special arrangements may be made.



## RECAP OF THE

### 59TH ANNUAL EDUCATION CONFERENCE & NATIONAL FORUM

October 21-24, 2010 🍂 Branson, Missouri

*Fall for NALS!* We also fell for Branson! Beautiful, picturesque Branson, Missouri, with three pristine lakes—Table Rock, Taneycomo, and Bull Shoals. The Chateau on the Lake is a gorgeous hotel with a friendly and helpful staff. We came from all over the U.S. to enjoy the mountain air and one another. Before settling down to networking, education, and fun at the conference, many of the NALS visitors came early to enjoy the offerings in Branson, including fishing and boating on the lakes, shopping, Silver Dollar City Amusement Park, shopping, the Titanic Museum, the many state-of-the-art theaters and shows, shopping, and the spa at the Chateau.

Thursday, October 21

#### *Bonus Leadership Training With David N. Horowitz*

The conference began with a bonus session on leadership with David N. Horowitz, a collaborative law attorney from Phoenix, Arizona. David is the recipient of the 2005-2006 State Bar of Arizona CLE Award and the 2007 NALS of Phoenix Boss of the Year Award. He served as a Judge Pro Tempore in Maricopa County and is a regular presenter at the Arizona State Bar's course on Professionalism.

When we registered for this session, we were advised to wear comfortable clothing and closed-toed shoes. Some of us heard rumors of what would be taking place and several of the Arizona members had attended prior leadership training sessions conducted by David. When the session began, he explained we would be breaking boards (!), no one would be hurt, and no one would leave the room without having broken a board—with our hands no less! The Arizona team assisted with distributing pine boards (approximately 1" x 12" x 14") to each of us. We were instructed to choose one side of the board to write down two goals and then on the opposite side write two obstacles to our goals. David gave us three ways to break our boards: (1) the preferred way—with one of our hands (by the special technique, which was explained and practiced); (2) stomp on it with our foot; or (3) ask our supporter to do it for us with either technique (1) or technique (2). As David explained, professionals today face many barriers that can stop them from getting what they want in their professional as well as their personal lives. Often what stops us are the beliefs that we hold about what is possible that may limit what we are capable of accomplishing. In addition, we may lack the key strategies necessary to achieve the success we desire. We learned that when we tap into our full potential, learn key strategies, and adapt new beliefs about what we are capable of accomplishing, we can dramatically improve our results and "break through" to what we want to achieve. What we think might be difficult becomes easy. In our fast-paced, high-demand world of balancing personal and professional lives, we need tools that help us more quickly and easily achieve what we desire. The take-aways from this session are: (1) empowerment comes from within; (2) use the support system around us; (3) we have the ability to

change our situation; (4) celebrate the success of others; and (5) it is not failure when we don't accomplish a task the first time or if we use a different method or technique.

### *Regional Meetings*

Individual regional meetings were held following the afternoon education sessions giving each region an opportunity to come together for networking and to take care of business.

### *Optional Event*

The special optional event for Thursday was Dolly Parton's Dixie Stampede Dinner and Show, an action-packed extravaganza appropriate for all ages and a four-course dinner complete with dessert. The show included friendly competition, beautiful horses, trick riding, a stampede of Longhorn steer, music, dancing, outstanding special effects, and audience participation. President Patricia E. Infanti, President-elect Kathleen Amirante, and Michael Lewis (the husband of one of the Mississippi members) joined in one of the acts down in the arena. The show concluded with a video patriotic presentation by Dolly Parton and a salute to the Colors.

## **Friday, October 22**

### *Opening Keynote Session*

The opening session began with a warm welcome by President Patricia E. Infanti, PP, PLS, and acknowledgement of the hard work the NALS Staff and NALS Education Task Force had done to bring the top-notch sessions offered at the conference. President Patti then introduced the 2010-11 Board, followed by the NALS Past Presidents in attendance. These extraordinary women included Anita Cottrell, PP, PLS (1994-95, New York); Deborah Nickerson, PP, PLS (1998-99, Maine); Marie Ringholz, PP, PLS (2000-01, Georgia); Jill Hall, PP, PLS, CLA (2001-02, Arkansas); September Holmblad, PP, PLS (2002-03, Minnesota); Mary Jo Denman, PP, PLS (2005-06, Georgia); Cathy Hankins, PP, PLS (2006-07, Ohio); Dee Beardsley, PP, PLS (2008-09, California); and Julie Abernathy, PP, PLS (2009-10, Texas).

Immediate Past President and Nominations Chair Julie A. Abernathy introduced Kathie Amirante, PP, PLS (Michigan), who will serve as the 2011-12 President, and Patricia E. Infanti (Pennsylvania), who will serve as the Immediate Past President, and announced that she would serve as the 2011-12 Foundation Chair. Julie then introduced the candidates for the 2011-12 year.

Each year three outstanding legal professionals and members of this association are selected as finalists for the Award of Excellence. The NALS Award of Excellence is the highest award that can be given to a NALS member. President Patti introduced the three Award of Excellence finalists, who were presented with a plaque:

Mary Jo Denman, PP, PLS (Atlanta, Georgia)  
Kathy Sieckman, PP, PLS, CLA (Phoenix, Arizona)  
Peggy Sullivan, PP, PLS (Kansas City, Missouri)

The final announcement of this year's Award of Excellence winner was made at the Recognition Luncheon on Saturday.

The next group to be introduced were those who would never be able to attend a NALS conference in the same capacity again. They were the members who attended their very first NALS conference and included: Honey Brown (Mississippi), Karen Caldwell (Georgia), Julie Cowles (Michigan), Jamie Early (South Carolina), Lita Ferrell (Tennessee), Janet Gordon (Arkansas), Victoria Hellmer (Tennessee), Annette Jeltema (Michigan), Candace Johnson (Arkansas), Laura Jousma (Michigan), Juanita Lee (Missouri), Patricia Mart (Missouri), Joyce Morgan (Arkansas), Carl Morrison (Oklahoma), Judy Reid (Arkansas), Diane Stanley (Texas), Janet VandenBerg (Michigan), and Tené Wansley (Mississippi).

It was announced that the NALS Marketplace and Exhibit Hall would open following the keynote session. We were encouraged to meet and talk with all the exhibitors and sponsors, and to partake of the Exhibitor Luncheon provided with our registration. This year's sponsors included Legal Directories Publishing Company, Avery Dennison, Liberty Mutual, Sam's Club, and Avansic. The exhibitors were Firefly Legal, Scentsy, UPS, and Art Bookbinders of America. Coffee break sponsors were Sam's Club on Friday and Delmar/Cengage Learning on Saturday.

President Patti then invited Foundation Chair Faynell Poe, PP, PLS, to introduce the opening keynote speaker, Erick Burton, CSP, who was brought to us courtesy of the NALS Foundation. Erick Burton is known as "The Leadership Accelerator™," president of Burton Resources, and the founder of the Burton Leadership Center near Kansas City, Missouri. He has partnered with hundreds of corporations and associations as a professional speaker, facilitator, and executive coach. Erick is the author of *Blueprint for Success—Powerhouse Professionals* and *Have You Filed Your Flight Plan?* He has attained the National Speakers Association's Certified Speaking Professional (CSP) designation, the speaking profession's international measure of professional platform skill. Erick's presentation was interactive. He said that thinking big is not living big and our approach to life is key—attitude is everything. We should seize the opportunity to change things around us for the better. It is people who make history, not the other way around. We should not let our organization or our professional growth stand still—we need to take charge! Erick concluded in telling us that it all comes down to choice and that we should not be prisoners of our past, but the architect of our lives.

### ***Executive Coaching Session***

This was a special ticketed event with Erick Burton, CSP. The experience was exciting and enlightening, but you had to be there since what was discussed was much like Vegas—what goes on there stays there. Those who took advantage of this opportunity went away thinking of people who should have been there but weren't and how to apply what had been learned within the association and at work.

### ***NALS Foundation Live Auction***

The live auction was fun and exciting. There were many, many great items up for bid, including beautiful jewelry. The NALS auctioneer, Leslie Keys, PLS (Georgia), revved up the competition and got almost everyone to empty their wallets for the NALS Foundation.

### ***Welcome Party***

The welcome party was everyone's idea of NALS fun: good food, good music, and lots of dancing. Our DJ, Kerry Jackson, played enough of a variety of music to suit all tastes. We danced until we dropped and left happy.

Saturday, October 23

### *Recognition Luncheon*

At the Recognition Luncheon President Patti welcomed everyone and acknowledged the hard work and dedication of the Branson task force members who had volunteered to make this conference a success. As President Patti recognized the members of the task force for their service in obtaining speakers and coordinating help with registration, NALS Education Director Jeanne Shaw, PP, PLS, presented certificates of appreciation to: Michelle Haughey, PP, PLS (Missouri); Danny Looney (Arkansas); Marsha Smitherman, PP, PLS (Missouri); Peggy Sullivan, PP, PLS (Missouri); and Cheryl Summerhill, PLS (Arkansas).

In November of 2009, NALS began the Think Big campaign of “Recruit five new members and get your national dues waived.” Any member who recruits five new members in their same class of membership within a 12-month period will have their national dues waived for the year. President Patti announced that we have two members who fall within that category and recognized them: Stephanie Ottino of Corpus Christi ALP (Texas) and Jan Dear of Metro LPA (Mississippi).

This past March in Tulsa President Patti announced the reopening of Lifetime Membership. President Patti recognized the two new Life Members joining this year: Nancy Honer, PP, PLS (Oregon) and Dolores Oliver, PLS (Michigan). President Patti also recognized all NALS Life Members attending the luncheon.

President Patti acknowledged members in attendance for receiving their CLE Award this past year: Sharon Davis, PLS (Arkansas); Kimberley Elliott, PP (Louisiana); Delana Freouf, PLS (Arizona); Rita Ann Gilson, PP, PLS (Pennsylvania); Tara Hughes, PP, PLS, CP (Arizona); Patricia Infanti, PP, PLS (Pennsylvania); Tanya James, PLS (Arizona); Jeanice Johnston, PP, PLS, TSC (Texas); Karen McElroy, PP, PLS (Arizona); Peggy Sullivan, PP, PLS (Missouri); Cheryl Summerhill, PLS (Arkansas); and Margaret Wilson, PLS (Arkansas).

NALS Certification Director Doris Compton, PP, PLS, recognized several certification groups in attendance:

- (1) Individuals achieving certification since March 2010: Laura Jousma, PLS (Michigan); Gina Knight, PLS (Mississippi); and Cindy Maze, PLS (Alabama).
- (2) All ALSs, PLS, and Professional Paralegals.
- (3) All exam administrators.
- (4) Individuals who renewed their Professional Paralegal certification: Kathleen Amirante, PP, PLS (Michigan); Susan Ellis, PP, PLS (Colorado); Rita Ann Gilson, PP, PLS (Pennsylvania); Mary Hand, PP, PLS (Arkansas); and Vernelle Collins, PP, PLS (Arizona).
- (5) Individual who renewed their PLS certification: Kathleen Amirante, PP, PLS (Michigan); Donice Alford, PP, PLS (Tennessee); Marina Baker, PLS (Washington); Mariann Fletcher, PLS (Washington); Rita Ann Gilson, PP, PLS (Pennsylvania); Mary Hand, PP, PLS (Arkansas); Catherine Hankins, PP, PLS

(Ohio); Tina Hurley, PP, PLS (Texas); Patricia Infanti, PP, PLS (Pennsylvania); and Brooke Nicholson, PLS (Colorado).

Doris concluded certification recognitions by stating that these individuals are truly outstanding and an inspiration to all members as they continue to learn and grow with their profession.

Next on the agenda was the Award of Excellence, the highest honor NALS bestows on a member. President Patti explained the criteria for the award; and thanked this year's distinguished judges: Ken Rogers, Esq.; Josh Neally; and Lisa Taylor. All past winners of the Award of Excellence were asked to stand and be recognized: Karen McElroy, PP, PLS; Jeannie Shaw, PP, PLS; Karen Kuhn, PP, PLS; Patricia Infanti, PP, PLS; Betty Wells, PP, PLS, TSC; Marlene Oiler, PP, PLS; Debbie Nickerson, PP, PLS; and Janice Miller, PP, PLS, CPS. President Patti asked this year's Award of Excellence finalists to stand and be recognized: Mary Jo Denman, PP, PLS; Kathy Sieckman, PP, PLS, CLA; and Peggy Sullivan, PP, PLS. She also asked those who have been a NALS Award of Excellence finalist to stand and be recognized. President Patti then announced the winner of the NALS 2010 Award of Excellence:

Mary Jo Denman, PP, PLS

Following comments by Mary Jo Denman, President Patti concluded the luncheon by congratulating all the newly certified members and Mary Jo Denman, the 2010 Award of Excellence Winner.

### *Closing Keynote Speaker*

NALS Foundation Chair Faynell Poe thanked everyone for their support of the Foundation during the conference and reminded us of the treat we would have in store at the Foundation Gala later in the evening, the all-male *a cappella* group, the Missouri State Beartones. She also reminded us that a beautiful fire agate necklace would be presented to one of the conference registrants at the Gala. Faynell then introduced our closing keynote speaker, David N. Horowitz, who had presented the bonus leadership training session that opened the conference. His closing keynote presentation centered around a very moving and personal story for David, with emphasis on the following statement: "Millions come to us hoping we will manage their legal issues. They expect us to use our experience to make their important concerns seem easy and ordinary. They want us to do anything to get the job done." His message to us was that we have a duty not to let one tragedy stop us from doing what needs to be done. David left us with ten "Gifts" to inspire us in our lives:

1. You have the right to be hopeful. Life does not cease to be funny through serious times nor does life cease to be serious during funny times.
2. Accepting help is your gift to the person who is helping. To deny them that opportunity is to shove away their gift.
3. Most things aren't even important let alone really important.
4. You can manage the unimaginable.
5. Heroes are ordinary people who exhibit courage and calm in extraordinary situations.

6. Even a miraculous achievement can feel easy and graceful if you lay all of the groundwork first.
7. Self-care is an essential element of caring for others.
8. There are millions of people in your age group. What you do is worth celebrating.
9. Good judgment comes from experience and experience comes from bad judgment.
10. Stop at nothing to get the job done. Leave nothing unsaid or undone to get the job done.

### *NALS Foundation Fundraising Closing*

Before the Foundation fundraising closing, Reba Peden, PP, PLS, Marketing Chair, announced that \$1300 had been donated to the Mountain Country Homes of Hope.

Following that announcement, Foundation Chair Faynell Poe spoke on the many endeavors and achievements of the Foundation. She announced that the Foundation had awarded grants in excess of \$24,000 during the 2009-10 fiscal year and with a focus on education and certification, the Foundation had assisted chapters, states, and regions with providing quality programs for the members, including a grant to NALS underwriting the May 20, 2010, and August 19, 2010, Webinars titled “Think Big—Insight to the Knowledge Needed to Serve at the National Level.” That same year, the Foundation heeded the challenge to “engage” and began looking to the future of NALS. Funding was provided for the NALS Think Tank, a group of individuals working together to ensure the continued success of NALS. Also, scholarships were awarded to nine Future Leaders to attend the 2011 Professional Development Conference. Faynell announced that this year the Foundation Trustees anticipate awarding even more funds for grants to chapters, states, and regions for their education and certification programs and will continue to sponsor the NALS Jett Awards and fund nationally acclaimed keynote speakers at both conferences, as well as maintain the NALS Foundation Learning Center. Faynell thanked the conference attendees for our generous support, as well as all of the supporters who were not able to be at the conference. Faynell concluded by thanking Past President Dee Beardsley, Immediate Past President Julie Abernathy, and President Patricia Infanti for allowing her to chair the Foundation for the past three years.

The Foundation drawings began with the drawing for the Circle necklace, which included the names of all Circle donors. The winner of the Circle necklace was Brenda Simmons, PP, PLS (Alabama). Drawings were held for the various prizes and the prizes claimed by the winners. Next were the drawings for the premium prizes. Joanne Davis, PP, PLS (Oklahoma), won the emerald ring, and Karen McElroy, PP, PLS (Arizona), won the diamond necklace.

### *NALS Foundation Gala*

NALS Foundation Chair Faynell Poe welcomed us to the Foundation Gala and announced that \$17,110 had been raised from the Foundation auctions and sweepstakes drawings over the weekend. The NALS Gala necklace was awarded to Deborah Waters (Florida), the iPod to Barbara LeCaptain, PLS (Wisconsin), and the Kindle to Kathy Cusack, PLS (Washington). The Foundation Gala was fun and

exciting. We enjoyed the dinner and each other's company. The members of the Missouri State Beartones, our entertainment for the evening, joined us at various tables for dinner. Following dinner each table cheered the ones who had sat at their table as each of the men was introduced from the stage. The Beartones are an all-male *a cappella* group from Missouri State University in Springfield, Missouri. The group was formed in 2001 and has since traveled and performed extensively in the Midwest and been invited to sing all over the country. The Beartones are a not-for-profit student-run organization designed to entertain music lovers from all genres. We enjoyed their performance tremendously.

### *Young Legal Professionals Reception*

A reception for the Young Legal Professionals group was held in the hotel lounge.

**Sunday, October 24**

### *Bonus Session With Jay Moore*

In this bonus session, Jay Moore invited us to "join the conversation." Jay is the communications manager for NALS, serves as the staff liaison to the Marketing and @Law Committees, and assists the Strategic Planning Committee. This year Jay also works with the NALS Think Tank to help plan for the future of NALS. He owns his own graphic design and marketing consultation business, Letter 10 Productions. In his presentation, Jay said that Facebook, Twitter, LinkedIn, YouTube, Flickr, and whatever the latest and greatest social media service is out there all work along one principle . . . have a conversation. In this session we looked at how we can utilize social media in our personal and professional lives to better our careers.

### **Leadership and Education Sessions**

The concurrent leadership and education sessions offered at the conference covered a variety of topics and were outstanding as usual and gave us the opportunity to earn a possible 18.0 hours of continuing education credits. The ability to be in more than one place at a time would have been a definite advantage in deciding which sessions to attend. In addition to the sessions described above, the offerings included (in order of appearance on the conference schedule):

**Corporate Sponsor Session—Avery** presented by Karl Schoen. Karl Schoen, a consumer education specialist with Avery Dennison, a NALS corporate sponsor, talked about time-saving tips, image-enhancing ideas, and cost-saving options through the use of Avery products. Avery software and formatting solutions are designed to help us make the most of our time, put a professional polish on mailings with a few easy steps, and tips for producing professional presentations and meeting materials.

**The Government's Civil Litigation Alternative for Vaccine-Related Injuries—The National Vaccine Injury Compensation Program** presented by Andrew D. Downing, a partner in Rhodes Hieronymus who specializes in vaccine injury litigation before the Court of Federal Claims. Drew is also an adjunct faculty member at the University of Tulsa. Vaccines save lives by preventing disease, and a majority of people who receive them have no serious problems. However, vaccines, like all medicines, are not free of risk and sometimes these same, well-known vaccinations can cause side effects or adverse reactions with life-threatening consequences. The National Vaccine Injury Compensation program (VICP) was created as a no-fault alternative to the traditional tort remedy of suing the physician or drug manufacturer for damages sustained as a result of an adverse reaction. Drew covered the

framework and requirements of the VICP, who may receive benefits, how the VICP works, and some of the myths and truths about vaccines and the VICP that have been so prominent in the news lately.

**Controlling ESI Costs—Avansic** with Dr. Gavin W. Manes, a nationally recognized expert in e-discovery and digital forensics, who has published many papers and given hundreds of presentations on the subject. He discussed the variety of reasons for high e-discovery costs and ways to reduce those expenses, which includes practical steps that can be taken at any point during e-discovery, from preservation to processing to production. Dr. Manes included a section on the proper use of de-duplication.

**Intellectual Property 101: What Do You Really Need to Know About Patents, Trade Secrets, Trademarks, and Copyrights?** with Amy C. Kelly, Esq., and Benjamin P. Tabor, Esq. Amy is currently with the Kansas City law firm of Shook Hardy & Bacon and serves as a guest speaker regarding intellectual property and trademark matters. Ben is an associate in Shook Hardy & Bacon's intellectual property practice group. As the competition in the world economy continues to change, a familiarity with the many common forms of intellectual property is crucial to success in today's commercial environment. The speakers provided useful fundamental information on how to identify and protect intangible intellectual property assets; described the various forms of intellectual property; and discussed ways for clients to protect those assets. The speakers also addressed patentable inventions, trade secrets, trademarks, and copyrights, and described the roles that legal professionals play in the process.

**The Legal Assistant's Guide When Good Clients Venture Into the Music Business [or as the Beatles would say, "I Want to Hold Your Hand"]** with Nolen W. Berry, Esq.. Mr. Berry is semiretired from the active practice of law and devotes most of his time acting as one of the managing members of the Bob-Nolen Agency, L.L.C., which provides national booking and marketing services for musical artists. He is also president of BB&C Music Publishing Company, which deals in the general business of music publishing by acquiring original musical compositions, entering publishing contracts with songwriters, promoting commercial use of such songs, licensing song copyrights, and collecting and administering copyright royalties. Mr. Berry's presentation was designed to help legal assistants understand the roles, relationships, and basic contracts between performers, venues, management, songwriters, music publishers, sponsors, investors, and performing rights societies [or as Bruce Springsteen would put it, "Working on a Dream"]. The session also answered the question of what happens when the client enters into one of those unfamiliar roles and gave examples and additional outside resources.

**Crime Scene Investigation and Computer Forensics** with Sergeant Sean Barnwell. Sergeant Barnwell is a Missouri Certified Police Officer with the Branson Police Department and assigned to Criminal Investigations. He currently specializes in financial and technology-based investigations. In this session Sergeant Barnwell discussed crime scene investigation techniques from the past to the present and the CSI Factor and its relationship to current crime scenes. Demonstrations were conducted on crime scene processing techniques. He said that computer forensics are adapting to our ever-changing technological environment and discussed these changes and how they affect a criminal case.

**Windows 7** with Preston Yoder. Preston has worked in the computer field for over twenty-five years and is currently with Lindsey Software Systems. The main focus of this very enlightening session was to bring users up to speed on the Windows 7 operating system. The discussion included information on the differences between Windows 7 and previous versions; how to configure Windows 7 to work the way we want; the differences in the four versions of the program that are available for

purchase; how to protect computers from viruses and spyware; how to download and get programs that will both protect and enhance the performance of a computer; and much, much more.

**Estate Planning** with Emily J. Kembell, Esq. Emily is an associate with Carnahan, Evans, Cantwell & Brown, P.C., in that firm's estate planning practice group. She concentrates her practice in the areas of estate planning and administration, estate gift and income taxation, and probate. During her presentation, she discussed the "standard" provisions of forms utilized by virtually every trust agreement and the failure to rethink the provisions that may produce unexpected and undesirable results. Emily also discussed how many of these provisions are impacted by changing law and circumstances and alternatives to the boilerplate provisions that should be considered.

**FDIC Rules and Regulations** with James D. LaPierre, Regional Director of the FDIC's Kansas City Region, Division of Supervision and Consumer Protection, with oversight of all aspects of risk management and consumer compliance supervisory activities for the region. This session provided a general overview of the FDIC, information about the current market conditions and emerging banking/regulatory issues, and a brief summary of the various government programs designed to stabilize the financial sector. James concluded with a general Q&A on safety and soundness and consumer compliance issues.

**Bankruptcy Basics: What Every Legal Professional Should Know** with Dan R. Nelson, a partner with the firm of Lathrop & Gage, LLP, in their Springfield, Missouri, office. Dan's practice areas are bankruptcy, creditors' rights, and business litigation. He is the former law clerk to the Honorable Almon H. Maus of the Missouri Court of Appeals, Southern District, and has been a member of the Panel of Chapter 7 Bankruptcy Trustees for the Western District of Missouri since 1988. During his presentation, Dan provided information on key bankruptcy issues, including commencement of the case, the automatic stay, property of the estate and exempt property, reaffirmation agreement and avoidable transfers, and dischargeability of debts.

**Ethics** with Melissa DeLacerda, Esq. Melissa is engaged in the private practice of law in Stillwater, Oklahoma. The majority of her years in private practice have been as a solo practitioner with a heavy emphasis in family law. She is the chairperson of the Professional Responsibility Commission of the Oklahoma Bar Association, which is the tribunal that disciplines lawyers. Melissa was included in a book entitled *Leading the Way: A Look at Oklahoma's Pioneering Women Lawyers*, which featured women attorneys from before statehood through publication of the book in 2003 and highlighted their accomplishments. The session was interactive and geared to legal support staff. Melissa began with a discussion of her involvement in the attorney discipline process and the principles as they apply to nonlawyer staff members. She talked with the audience about the realities of how staff members might deal with resolving conflicts such as attorney impairment, mishandling of client funds, and the bar complaint process. During her presentation she included relevant case histories and provided insight on practical solutions for appropriate actions when staff is confronted with sensitive issues.

**Immigration Law Basics and Why Our Current System Is Considered Broken** presented by Arminda Ferguson, Esq. Arminda is a senior attorney with the Ferguson Immigration Law firm with offices in Rogers, Arkansas, and Branson, Missouri, and has dedicated her law practice exclusively to immigration and nationality law. This presentation included an overview of the immigrant visa petition process, Department of State visa bulletin, consular process versus adjustment of status, how an illegal entry and a criminal record affect obtaining lawful status, and suggestions on how our system could function better.

## **A Final Thank You**

Special thanks to our corporate sponsors, exhibitors, and advertisers for their contributions to the success of this conference: Aflac (corporate sponsor advertiser), Art Bookbinders of America, Inc. (exhibitor), Avansic (advertiser and exhibitor), Avery Dennison (corporate sponsor exhibitor and advertiser), Carolina Marketing Devices, Inc. (advertiser), Delmar/Cengage Learning (coffee break sponsor), Esquire Solutions (exhibitor), Firefly Legal (exhibitor), Legal Directories Publishing Company, Inc. (corporate sponsor advertiser), Liberty Mutual (corporate sponsor advertiser), Paralegal Today (advertiser), Region 6 (advertiser), Sam's Club (corporate sponsor exhibitor and coffee break sponsor), Scentsy, and UPS (exhibitor).

A very special thanks to our Missouri members; Executive Director Tammy Hailey, CAE; and the Resource Center staff (Saundra Bates, Diana Price, Jennifer King, and Jay Moore) for creating an outstanding "Fall for NALS" conference! You rock!

## **After-Conference Report on Hashtag #NALS10**

Following the Branson conference, Jay Moore gathered the stats from the conference and reported the following from Twitter posts using the hashtag #NALS10. We had 39 people use the tag for a total of 644 mentions in tweets. This led to 337,492 exposures over 6 days. Kristina Duncan (legalninja@twitter.com) once again led the way with 116 tweets for 215,760 exposures (not bad since she wasn't at the conference!). Jay Moore posted 70 times using NALStweet for 40,250 exposures and Brynne Williamson posted 99 times for 26,730 exposures. These were the main number contributors on exposures, but we had great participation from members as Misty Lewis posted 55 times, Patricia Infanti had 58, Tammy Hailey had 36, Kathy Sieckman had 35, and Julie Abernathy had 21 posts. Jay says this is up substantially from previous years when we relied on outsiders to push the messages and this year we had a lot of exposure and really only used NALS members with only a couple of large follower people ReTweeting to push the message. Tammy Hailey says this really helps the members not in attendance feel a part of what is going on, as well as connects those in attendance. President Patricia Infanti commented that this will help show members the purpose behind Twitter and drive them to the NALS Web site to read the Tweets. If you would like to join us in keeping the momentum going between conferences, use the hashtag #NALS when you Tweet.

Helene L. Wood, PP, PLS, TSC-RE

NALS Secretary/Treasurer

*Congratulations to Region 4 members who  
passed their exams!*

Linda Baker, ALS (AL)

Amber Calloway, ALS (AL)

December Casey, ALS (AL)

Cody Eubanks, ALS (AL)

Lita Ferrell, PLS (TN)

Susan Fox, ALS (FL)

Kathay Holman, ALS (FL)

Elizabeth Hoornstra, ALS (FL)

April Hopson, ALS (AL)

Edith Luedke, ALS (FL)

Jo Ellen Medeiros, ALS (FL)

Fernando Parra, ALS (FL)

Michele Potter, ALS (AL)

Pamela Pritchard, ALS (FL)

Paige Sanchez, ALS (AL)

Suzette Sharp, ALS (FL)

Leanne Shaw, ALS (FL)

Susan Shockley, ALS (FL)

## NALS Mission Statement

NALS® is dedicated to enhancing the competencies and contributions of members in the legal services profession. It accomplishes its mission and supports the public interest through:

- Continuing legal education and resource materials;
  - Networking opportunities at the local, state, regional and national levels;
  - Commitment to a Code of Ethics and professional standards;
  - Professional certification programs and designations.
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## NALS Code of Ethics and Professional Responsibility

Members of NALS are bound by the objectives of this association and the standards of conduct required of the legal profession.

Every member shall:

Encourage respect for the law and the administration of justice;

Observe rules governing privileged communications and confidential information;

Promote and exemplify high standards of loyalty, cooperation, and courtesy;

Perform all duties of the profession with integrity and competence; and

Pursue a high order of professional attainment.

Integrity and high standards of conduct are fundamental to the success of our professional association. This Code is promulgated by NALS and accepted by its members to accomplish these ends.

Canon 1. Members of this association shall maintain a high degree of competency and integrity through continuing education to better assist the legal profession in fulfilling its duty to provide quality legal services to the public.

Canon 2. Members of this association shall maintain a high standard of ethical conduct and shall contribute to the integrity of this association and the legal profession.

Canon 3. Members of this association shall avoid a conflict of interest pertaining to a client matter.

Canon 4. Members of this association shall preserve and protect the confidences and privileged communications of a client.

Canon 5. Members of this association shall exercise care in using independent professional judgment and in determining the extent to which a client may be assisted without the presence of a lawyer and shall not act in matters involving professional legal judgment.

Canon 6. Members of this association shall not solicit legal business on behalf of a lawyer.

Canon 7. Members of this association, unless permitted by law, shall not perform paralegal functions except under the direct supervision of a lawyer and shall not advertise or contract with members of the general public for the performance of paralegal functions.

Canon 8. Members of this association, unless permitted by law, shall not perform any of the duties restricted to lawyers or do things which lawyers themselves may not do and shall assist in preventing the unauthorized practice of law.

Canon 9. Members of this association not licensed to practice law shall not engage in the practice of law as defined by statutes or court decisions.

Canon 10. Members of this association shall do all other things incidental, necessary, or expedient to enhance professional responsibility and participation in the administration of justice and public service in cooperation with the legal profession.