



## 2017 New York State Paralegal Education & Leadership Conference

**Dates:**

Friday & Saturday, September 15 & 16, 2017

**Venue:**

Marriott Syracuse Downtown  
100 East Onondaga Street  
Syracuse, New York 13202

### Conference Registration

Last Name:	First Name:	
Employer/School:	Title:	
Industry/Area of Law:		
Address:		
City:	State:	Zip Code:
Email Address:	Phone No.:	
Guest Registration Information:		

### Conference Information

(Please check each event that you plan to attend.)

- Friday Evening Welcome, Networking, and Cocktail Reception (Cash Bar)
  Saturday Breakfast
  Saturday Lunch
  Saturday Dinner (Cash Bar)

### Please select the CLE sessions that you would like to attend.

\*CLE Credit Available

**SESSION A**

- |  |                 |
|--|-----------------|
| <input type="checkbox"/> WNY: How to Take and Perfect Appeals  | 8:30AM-9:30AM   |
| <input type="checkbox"/> Ethics for the Paralegal: A Bird's Eye View of the ABA Guidelines on Utilizing Paralegals | 9:50AM-10:50AM  |
| <input type="checkbox"/> We Know What Paralegals Need to Do for their Lawyers – But...                             | 11:00AM-12:00PM |
| <input type="checkbox"/> Modern eDiscovery: Are You Smarter than a 5th Year Part 1                                 | 2:00PM-3:00PM   |
| <input type="checkbox"/> Modern eDiscovery: Are You Smarter than a 5th Year Part 2                                 | 3:30PM-4:30PM   |

**SESSION B**

- |  |                 |
|--|-----------------|
| <input type="checkbox"/> Healthcare and Elder Law  | 8:30AM-9:30AM   |
| <input type="checkbox"/> How to Create a Scientific Understanding of the Mild TBI Case in Litigation | 9:50AM-10:50AM  |
| <input type="checkbox"/> Social Security Law   | 11:00AM-12:00PM |
| <input type="checkbox"/> Eliminate Headaches from Improper Service of Process                        | 2:00PM-3:00PM   |
| <input type="checkbox"/> E-mail Etiquette: Dialogue in the Digital Age                               | 3:30PM-4:30PM   |

## Method of Payment

### On or Before June 30, 2017 Early Bird Registration Fee

- Association Member Fee - \$125
- Non Member Fee - \$150

### On or Before August 15, 2017 Standard Registration Fee

- Association Member Fee - \$150
- Non Member Fee - \$175

Please mail all registration forms and checks/money orders payable to:

**Empire State Alliance of Paralegal Associations, Inc.**

C/O Deborah King, ESAPA Treasurer, 330 Chadlee Drive, Brockport, New York 14420

- Registration is limited to the first 150 responses.
- Registration is also available online by visiting the ESAPA website at [www.empirestateparalegals.org](http://www.empirestateparalegals.org) and clicking the ONLINE REGISTRATION LINK.
- **Note:** Tickets may be purchased for guests not registered for the meeting: Advanced purchases are encouraged. \*\*See Guest Policies.
- Attendees are responsible for making their own hotel and travel reservations, as well as any cancellations for these arrangements.

Full Registration includes CLE's and the following events:

#### Friday, September 15, 2017

- Check-In & Registration for Conference
- Packets (including program book)
- Access to Exhibit Hall
- Friday Evening Welcome, Networking, and Cocktail Reception

#### Saturday, September 16, 2017

- Breakfast
- Lunch
- Dinner

## Conference Schedule

### Friday, September 15, 2017 – Evening

#### Check-In & Registration (4:00PM-6:00PM)

#### Opening Welcome Reception and Networking in the Exhibit Hall (6:00PM-8:00PM)

Join us for the unveiling of the 2017 Exhibit Hall presented by the Empire State Alliance of Paralegal Associations, Inc. ("ESAPA"), in support of the 2017 New York State Paralegal Education & Leadership Conference. Visit all of the generous and supportive vendors in the Exhibit Hall. We have scheduled this time to learn about the products and services they provide. Bring your business cards, talk with peers and meet and/or reacquaint yourself with our many vendors. Create new contacts and develop strong working relationships that can lead to numerous benefits.

There will be plenty of delicious hors d'oeuvres, and a premium cash bar. Don't miss this great opportunity to have a night of fun!

### Saturday, September 16, 2017 – Morning

#### Registration and Continental Breakfast (7:00AM-8:30AM)

Enjoy a continental breakfast with your peers as you start a full day of dynamic continuing legal education sessions, and meet the ESAPA leaders.

## **Saturday, September 16, 2017 – Afternoon:**

### **Lunch (12:00PM-1:45PM)**

Lunch is served, relax and enjoy a buffet, refreshing beverages and dessert.

## **Saturday, September 16, 2017 – Evening:**

### **Cocktail Reception (5:30PM-6:30PM)**

### **ESAPA Dinner with Keynote Speaker: Hon. James P. Murphy (6:30PM-8:30PM)**

Please join us for dinner to celebrate and give special recognition to the mission of the Empire State Alliance of Paralegal Associations, Inc. ESAPA is also very pleased to have as our Keynote Speaker, the Honorable James P. Murphy.

To further celebrate the paralegals of New York State, ESAPA has submitted a request to the Governor's office to proclaim September 15, 2017 as "Paralegal Day." We continue to await a response to the application. In the event the request is granted, an announcement will be posted to ESAPA's website.

### **KEYNOTE SPEAKER**

Hon. James P. Murphy was elected as a Justice of the New York Supreme Court in 2004 and currently sits in Onondaga County in the Fifth Judicial District where he is assigned to the General Civil Part. In addition to his Supreme Court duties, Judge Murphy was appointed in 2007 by then Chief Administrative Judge Jonathan Lippman to serve as District Coordinating Judge for the Town and Village Courts in the Fifth District and currently oversees 260 judges. He was an Adjunct Professor in Business Law at LeMoyne College in Syracuse, New York from 2008 – 2012 and regularly provides continuing education and training to Town and Village Judges, lawyers and law students. He is President Elect of the Onondaga County Bar Association and also serves on its Board of Directors, the Executive Committee and Finance Committee. He was recently elected as the Treasurer of the Judicial Section of the New York State Bar Association.

Judge Murphy is a graduate of St. Lawrence University and Syracuse University College of Law. He was in private practice for 20 years with an emphasis on civil litigation, along with representing several Towns and Villages. For over 10 years, he served as a full-time and part-time Assistant District Attorney for Onondaga County. Prior to taking the Bench, Judge Murphy was elected three times to the Onondaga County Legislature and served as Chair of the Ways and Means Committee, overseeing the County finances.

## **CLE Sessions**

**8:30AM-4:30PM**

**(Breaks: 9:30AM-9:50AM; 10:50AM-11:00AM; and 3:00PM-3:30PM)**

### **SESSION A**

#### **Appellate Practice - Western New York: How to Take and Perfect Appeals (8:30AM-9:30AM)**

**Presented by Robert Brucato, Esq.**

Rob Brucato opened the Buffalo Office of Counsel Press in 1992 and has continuously managed it since that time. Rob has 25 years' experience and has personally been involved with several thousand appeals. This CLE program focuses on the appellate process in New York's appeals courts as well as the United States Court of Appeals for the Second Circuit. Attendees will learn the methods for bringing and perfecting appeals in the Appellate Divisions (with the main focus on the Appellate Division Third Department and Appellate Division Fourth Department); how to manage the limited appeals jurisdiction of the New York Court of Appeals; and the many filings that are needed in the Second Circuit.

#### **Ethics for the Paralegal: A Bird's Eye View of the ABA Guidelines On Utilizing Paralegals and Updated in New York Law (9:50AM-10:50AM)**

**Presented by Margaret Phillips, Esq.**

Margaret Phillips, attorney, assistant professor and director of Daemen College's Paralegal Studies program reviews the do's and don'ts of paralegal ethics. Many new attorneys are not educated in their law school ethics class on how to walk the line between supervision and delegation with a paralegal. Likewise, many attorneys are not informed (beyond the unauthorized practice of law) of the ABA guidelines in proper utilization of paralegals in all aspects of practice. Prof. Phillips will review the ethical guidelines for attorneys and paralegals and will share her up-to-date research on New York law on ethical issues.

#### **We Know What Paralegals Need to Do for Their Lawyers - But What do Your Lawyers Need to Do for You? (11:00AM-12:00 PM)**

**Presented by Lynne-Marie Reveliotis**

Ms. Reveliotis is the current CEO and COO of two companies, LMR Enterprises, Inc. and Resolution Resources, Inc. She is a licensed Private Investigator in Massachusetts and holds several insurance licenses. She has taught litigation courses as a senior instructor as part of the Northeastern University paralegal professional program. Ms. Reveliotis has served on the Board of Directors in many capacities for the Massachusetts Paralegal Association and is the past Vice President and Director of Positions and Issues for the National Federation of Paralegal Associations, Inc. Ms. Reveliotis will present an informative review of the issues surrounding professional conduct and unauthorized practice of law. The presentation will include various ethical dilemmas to be reviewed and discussed with the audience.

## **Modern eDiscovery: Are You Smarter Than a 5<sup>th</sup> Year? (2:00PM-3:00PM, cont. 3:30PM-4:30PM)**

**Presented by Peter R. Coons, Sr. Vice President and Co-Founder of D4, and Kris Wasserman, Vice President & Senior Consultant**

Corporations continue to store data unnecessarily and its growth is unabated. While seemingly harmless, this data may be subject to preservation due to litigation or regulatory investigations. The cost of finding, collecting and reviewing this data can run into the millions on even a small matter. The price of not doing the aforementioned steps properly can cost an organization even more. This presentation will address the various phases of electronic discovery and provide technical advice regarding the identification and reduction of data prior to its review and production. Further, this presentation will address newer data repositories being sought by litigants, such as cloud data and smart devices. Advice will be provided on how to identify data stored in these repositories and steps one can take to preserve it.

### **SESSION B**

## **Healthcare and Elder Law (8:30AM-9:30AM)**

**Presented by Jennifer Flannery, Esq.**

Ms. Flannery's practice focuses on trust and estate litigation, planning, and administration. Ms. Flannery's trust and estate litigation practice includes Will and Trust Contests, Trust Litigation, Will Construction Proceedings, Fiduciary Litigation, Fiduciary Removal Proceedings, Accounting Proceedings, Spousal Rights Proceedings, and Kinship Proceedings. Ms. Flannery is also an adjunct professor at Hilbert College in its Legal Studies Department.

Ms. Flannery will cover the basics of elder law as they apply to paralegal responsibilities. Ms. Flannery will address legal issues related to asset management and conservation, disability planning, estate planning, guardianships, health care proxies and living wills, hospice care and other end of life issues, long-term care insurance, Medicare and Medicaid, powers of attorney, and more.

## **How to Create a Scientific Understanding of the Mild TBI Case in Litigation (9:50AM-10:50AM)**

**Presented by Jerid M. Fisher, Ph.D., ABN**

Dr. Fisher is a Board Certified Forensic Neuropsychologist with more than 30 years' experience. He earned his Bachelor's degree in Psychology from Duke University and his Ph.D. in Clinical Psychology from the University of Rochester. After working for several years at the University of Rochester Medical Center (URMC) as a Senior Instructor in Psychiatry and Neurology and the Director of the Cognitive Functions Laboratory, Dr. Fisher left academia to develop brain injury rehabilitation programs across New York State. Dr. Fisher has specialized in high profile litigation as a criminal expert for both the prosecution and defense as well as working as a plaintiff and defense expert in civil litigation matters.

## **Social Security Law (11:00AM-12:00PM)**

**Presented by Steven R. Dolson, Esq.**

Mr. Dolson practices in the primary areas of Social Security Disability and Bankruptcy law. Mr. Dolson will present information regarding Social Security Disability (SSD) and Supplemental Security Income (SSI). He will discuss basic eligibility and terminology; disability definition within Social Security; the 5-step sequential disability finding process; and the administrative procedures for claims.

## **Eliminate Headaches From Improper Service of Process (2:00PM-3:00PM)**

**Presented by Brani Andreev, MBA**

Do you know that according to the National Center for State Courts, process service is one of the top challenges confronting the Justice system? Consistent with fundamental notions of due process and fairness, a person must receive proper notice of any judicial action in which he/she is made a party. Yet service of process is often a neglected step in a legal proceeding. Proper service on a party and a correct affidavit of service filed with the court ensure that the parties to the action have been notified as prescribed by the law. Failure to complete this process may result in a delay, breach of duty, or termination of an otherwise successful trial. Legal market analysis conducted by Associated Services shows that more than 85% of paralegals and legal managers are not satisfied with their current process server.

## **Email Etiquette: Dialogue in the Digital Age (3:30PM-4:30PM)**

**Presented by Lesley Diaz**

Ms. Diaz is a small business owner, organizational consultant and educator with almost thirty years of experience in the fields of learning, leadership, decision-making and change. She currently teaches Organizational Behavior, Change and Transformation, Strategic Planning, and Systems Thinking for both Undergraduate and Master's students at Medaille College in Buffalo. Her passion is creating collaborative and cohesive workplaces where every voice can be heard and everyone's skills can impact shared goals.

Join Ms. Diaz for an informative presentation on what we know about how humans communicate and how technology has changed our communication. There will be an opportunity for interactional activity and discussion.

## Registration Information and Policies

- 1.) **Friday, June 30, 2017** (prior to midnight), is the cut-off date to qualify for the “early bird” registration fees. Mail-in registration forms (including check or money order) must be postmarked by **Friday, June 30, 2017** and mailed to:

Empire State Alliance of Paralegal Associations, Inc.  
Attn: Conference Registration  
c/o Deborah King, ESAPA Treasurer  
330 Chadlee Drive  
Brockport, New York 14420

**Tuesday, August 15, 2017** (prior to midnight) is the registration deadline. Mail-in registration forms (including check or money order) must be postmarked prior to August 15, 2017.

The registration form is also available at ESAPA’s website at [www.empirestateparalegals.org](http://www.empirestateparalegals.org) where you may pay through PayPal. (No registration will be processed without full payment.)

- 2.) Full registration includes a full track of CLE Sessions and the following events:

- Friday Evening Welcome, Networking, and Cocktail Reception
- Saturday Continental Breakfast
- Saturday Lunch
- Saturday Cocktail Reception and Dinner

**Note:** Tickets may be purchased for guests not registered for the conference.

- 3.) Guest Policies\*\*: Unregistered guests who intend to accompany you to any food functions must purchase a ticket for the event. Please indicate the name of any registered guest(s) at the time of your registration. Guest registration includes all on-site meals:

- Friday Evening Welcome, Networking, and Cocktail Reception
- Saturday Continental Breakfast
- Saturday Lunch
- Saturday Cocktail Reception and Dinner

\*\*Spouse/Guest Registration Fee: **\$75.00**; Saturday Dinner Only Fee: **\$50.00**.

- 4.) **Cancellation & Refund Policy:** All cancellations or requests for refunds must be made in writing and received by the Empire State Alliance of Paralegal Associations, Inc., prior to August 31, 2017. A \$25.00 administrative fee will be charged for all refunds. The cancellation fee will be deducted directly from the refund. Cancellations must be in writing to the ESAPA President: Edie Feiling via email at [ESAPA.President@gmail.com](mailto:ESAPA.President@gmail.com).

Should you have any questions about registration payments, confirmations, or any policies pertaining to this conference, please contact Edie Feiling at (716) 866-4388.

- 5.) **Hotel Accommodations:** The daily guaranteed room rate for the conference is **\$119.00** for single/double occupancy, plus applicable state and local taxes. To make reservations, please contact the hotel directly at (800) 228-9290 or visit their website at [www.marriott.com](http://www.marriott.com) and provide the group code **ESAPA**. Please identify yourself as attending the ESAPA Paralegal Education Leadership Conference.

**Hotel Reservation cut-off date:** **Thursday, August 17, 2017** (to receive conference rate / based upon availability).