

# Agenda

**Family Law Case Intake: From Call to Consultation** *K. Donlan*

- Standard operating procedures
- Performing conflicts checks and screening
- Types of information to gather
- Preparing engagement letter, opening file

**Preparing Pleadings and Assisting with Motion Practice** *S. Haggerty*

- Preparing initial pleadings
- Appearance
- Summons & complaint
- Answer and cross-complaint
- Custody application
- Motion for modification
- Motion for contempt
- Other common motions (*pendente lite* and *ex parte*)
- Mandatory discovery request and inventory of discovery
- Service

**Preparing Financial Affidavits** *L. Bessel*

- The purpose of the financial affidavit
- How to determine income for the employed
- Best practices to prepare an accurate FA
- Making updates throughout the case

**Obtaining and Evaluating Financial Information** *R. Bauer*

- Types of discovery
- Mandatory disclosure
- Requests for production
- Request for interrogatories
- Requests for admission
- Depositions
- Working with experts to value assets
- Forensic accountant
- Pension valuation
- Business valuation
- Continuing duty to disclose
- Motions for orders of compliance

**Assisting with Child Custody and Visitation Issues** *J. DiSilvestro*

- Current status of custody law in Connecticut
- Obtaining relevant information, client interview, custody questionnaires, authorizations for disclosure
- Working with the guardian-ad-litem
- Working with experts
- Drafting and reviewing parenting plans

**Working with Divorce Clients and Opposing Counsel** *M. McGrath*

- Establishing and maintaining good communication with clients
- Methods of communication and contents of communications
- Guidelines for responding to client communications
- Working with difficult clients
- Working with the courts and opposing counsel
- Maintaining professionalism

**Handling Ethical Issues in Family Law Practice** *M. McGrath, R. Bauer, J. DiSilvestro*

- Complying with rules of professional responsibility and ethics guidelines for attorneys and paralegals
- Maintaining client confidentiality
- Avoiding the unauthorized practice of law
- Working with the secretive or dishonest client
- Zealous (vs. over-zealous) representation
- Q&A

## Connecticut Family Law Practice for Paralegals

North Haven, CT - Wednesday, February 5, 2020



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## Learning Objectives

**You'll be able to:**

**Identify** types of information to gather for a family law intake.

**Discuss** the process of obtaining and evaluating financial information, and get tips on preparing financial affidavits.

**Learn** how to assist with child custody and visitation issues.

**Explore** steps to take while working with divorce clients and opposing counsel.

**Discuss** ethical issues in family law practice, and review ethics guidelines for attorneys and paralegals.



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# Connecticut Family Law Practice for Paralegals

North Haven, CT - Wednesday, February 5, 2020



**Examine** family law case intake from call to consultation

**Learn** about preparing pleadings and assisting with motion practice

**Discuss** the purpose of the financial affidavit

**Explore** current status of custody law in Connecticut

**Study** ethical issues in family law practice

**Avoid** the unauthorized practice of law

**Continuing Education Credits**

This seminar offers paralegals 6.5 CLE hours, including 1.0 ethics hour.

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# Faculty

**Renee C. Bauer** *Attorney, Founder the Bauer Law Group, LLC, Hamden, CT*  
The Bauer Law Group, LLC is family-focused, offering legal services for divorce, custody and mediation. Ms. Bauer prides herself on building a business that brings hope to people in one of their darkest times. She presents legal education seminars to peers. Ms. Bauer has appeared on WTNH, as well as the radio, to comment on current legal topics. Recognizing that people need reliable information about divorce, she organized informational sessions at local libraries about the divorce process and alternatives to litigation so that people can make informed decisions for their families. Ms. Bauer penned the book *Divorce in Connecticut* (Addicus Books) which can be found in every library throughout the state. She also authored a children’s book about divorce, *Percy’s Imperfectly Perfect Family* (Archway Publishing) as a resource for parents and children going through the divorce process. In addition, Ms. Bauer authored, *The Ultimate Guide to Solo and Small Firm Success* (LawFirst Publishing) to help other attorneys open their own practice.

**Kathryn Donlan** *Paralegal, the Bauer Law Group, LLC, Hamden, CT*  
Ms. Donlan graduated from Quinnipiac University with a bachelor of arts degree with a concentration in Legal Studies. She got her feet wet interning at Cantor Colburn LLP as a legal administrative assistant, work that solidified her continued desire to work in the legal field. At BLG, Ms. Donlan tackles every project with enthusiasm and welcomes challenges head on.

**Shannon Haggerty** *Paralegal, the Bauer Law Group, LLC, Hamden, CT*  
Ms. Haggerty graduated from University of New Haven in 2011 with a bachelor’s degree in Criminal Justice- Investigative Services and obtained her master’s degree in Criminal Justice-Victim Services from the University of New Haven in 2013. After graduating, she began her career as a domestic violence advocate and became certified as a domestic violence counselor by the Connecticut Coalition Against Domestic Violence. Ms. Haggerty brings her expertise working with clients experiencing domestic violence, divorce and child custody conflicts to her role as paralegal for the Bauer Law Group. She currently attends law school at Quinnipiac University School of Law.

## Seminar Information

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**Continuing Education Credit Information**

This seminar is open to the public and offers 6.5 CLE hours, including 1.0 ethics hour, to paralegals. The National Association of Legal Assistants and the National Federation of Paralegal Associations have each approved this event.

Attendance will be monitored, and attendance certificates will be available after the seminar for most individuals who complete the entire event. Attendance certificates not available at the seminar will be mailed to participants within fifteen business days.

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Audio recordings of this seminar are available for purchase starting at \$269. See registration panel for more information and please refer to specific state licensing rules or certification requirements to determine if this learning method is eligible for continuing education credit.

**Leslie Bessel** *Office Manager, the Bauer Law Group, LLC, Hamden, CT*  
Ms. Bessel attended Stony Brook University and brings her extensive experience in business management to the Bauer Law Group, LLC. She is well-versed on the art of best billing practices. But, perhaps more importantly, she brings a steadfast loyalty and dedication to all of the firm’s cases. It is not uncommon for clients to stop by the office to hug Leslie good-bye when we wrap up a case.

**Joseph A. DiSilvestro** *Attorney the Bauer Law Group, LLC, Hamden, CT*  
Mr. DiSilvestro dedicates much of his legal practice to advocating for children as a guardian ad litem or attorney for the minor child. In this role, he helps families look past their conflict to a resolution that is best for the children. He believes that while children might have the smallest voice in the family, sometimes they have the most to say. In addition to family law, Mr. DiSilvestro is an experienced practitioner in the following areas: bankruptcy, motor vehicle law, personal injury, real estate, criminal law and probate. He currently serves as co-chair of the Family Law Committee of the New Haven County Bar Association. This committee brings continuing education to the legal community.

**Megan C. McGrath** *Attorney, the Bauer Law Group, LLC, Hamden, CT*  
In 2016, Ms. McGrath was recognized as a Connecticut Law Tribune New Leader in the Law. This honor is bestowed to only a small group of attorneys each year based on a proven track record of success. She also has been named a Super Lawyer Rising Star for multiple years. Ms. McGrath believes the best resolution in any family matter is the one the client crafts. Under this premise, she works tirelessly to help clients reach settlements outside of court. However, she is prepared to litigate and has successfully tried fully contested divorces, custody actions and post-judgment matters. She is a certified mediator as well as a certified guardian ad litem (GAL) and attorney for the minor child (AMC). Ms. McGrath has represented children of all ages in custody matters. Now that she is a mother, she is passionate about giving children a voice in this capacity.

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# Registration

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