

# Agenda

## Assisting with Family Law Case Intake

Performing conflicts checks      Assisting with initial client interview  
Preparing engagement letter, opening file  
Collecting information

L. Reid

## Preparing Pleadings and Assisting with Motion Practice

Preparing initial pleadings      Requesting temporary relief  
Preparing for the temporary orders hearing  
Preparing the temporary orders

M. Williams

## Obtaining and Evaluating Financial Information

Identifying relevant information on assets, debts, income and expenses  
Obtaining financial information

- Using financial information questionnaires
- Using interrogatories, requests for production, deposition testimony, private investigators
- Valuing assets

Evaluating the information and creating effective reporting tools  
Working with accountants and financial experts  
Preparing financial statements

C. Panther

## Assisting with Child Custody and Visitation Issues

Current status of custody law in Tennessee  
Obtaining relevant information

- Client interview, custody questionnaires, authorizations for disclosure, using formal discovery

Working with guardian-ad-litem  
Working with experts  
Drafting and reviewing parenting plans

A. Walsh

## Working With Divorce Clients and Opposing Counsel

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  
Capturing your time for billing  
Dealing with cultural or linguistic barriers to communication  
Boundaries for opposing counsel and clients

J. Cassell

## Assisting with Alternative Dispute Resolution

Assisting in family law mediation

- Early stage mediation
- Co-mediation
- Mediation statements
- Preparing the client

Assisting in the collaborative divorce process

- TN Supreme Court Rule 53 requirements
- Screening clients for process
- Information gathering and reporting

Differences in mediation and collaborative processes

C. Panther

## Tennessee Family Law Practice for Paralegals

Nashville, TN - Wednesday, May 13, 2020



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## Learning Objectives

### You'll be able to:

- Perform** conflict checks and assist with initial client interviews.
- Assist** with the preparation of initial pleadings and temporary orders.
- Identify** relevant information on assets, debts, income, and expenses.
- Discuss** the current status of custody law in Tennessee.
- Establish** and maintain good communication with clients.
- Assist** in family law mediation and the collaborative divorce process.



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# Tennessee Family Law Practice for Paralegals

Nashville, TN - Wednesday, May 13, 2020



- Assist** with family law case intake
- Draft** pleadings and assist with motion practice
- Obtain** and evaluate financial evidence
- Learn** about assisting with child custody disputes
- Work** effectively with divorce clients and opposing counsel
- Assist** in mediation and in the collaborative divorce process

### Continuing Education Credits

This seminar offers all  
paralegals 6.5 CLE hours.

NALA Approved  
NFPA Approved

Enjoy HalfMoon Education's flexible scheduling and different program delivery options! In the event of health concerns, program may be offered as a live webinar or be rescheduled, and will also be available as an on-demand course.



# Faculty

**Lori Thomas Reid** is an attorney at Reid Family Law. She is a 1985 graduate of the University of Mississippi School of Law. Ms. Reid has practiced family law for nearly 30 years, including working as a IV-D attorney in the 21st Judicial District of Tennessee from 1994 until 2004. She opened Reid Family Law in 2017, where she focuses her practice on prenuptial agreements, divorce, post-divorce, child support, custody, adoption, grandparent’s rights, and juvenile court cases. She is a Rule 31 Listed Mediator. In January of 2020, Ms. Reid was appointed by the Tennessee Supreme Court to the Alternative Dispute Resolution Commission for a two-year term. She received the Professionalism Award from the Williamson County Bar Association in 2010.

**Megan Williams** is a senior litigation attorney with the International Domestic Litigation firm of Cordell and Cordell, PC. She opened the Nashville, Tennessee, location and currently works in the Nashville office serving North Nashville family law clients. She earned her bachelor of arts degree in Political Science from DePaul University and her juris doctorate degree from Florida Coastal School of Law in 2011. In 2015, she was named as the Top Regional Performer with her firm. In 2016, she was named to the National Advocates Top 40 Under 40 list. Ms. Williams is a member of the Nashville Bar Association, the Tennessee Bar Association, and the Junior League Advocacy Committee, and she is a Board Member with CASA. In her free time, she loves to travel and spend quality time with her teacup yorkie named Benji.

**Cheryl Panther** is a certified public accountant, Tennessee Supreme Court Rule 31 Listed family mediator, and president/founder of Panther Financial Planning, LLC, a registered investment adviser (Tennessee). She provides creative, outside-the-box analytical skills to the often complex, confusing, and ever-changing financial and taxation issues in divorce cases and settlements. She executes a variety of specialized divorce financial services for clients and attorneys, including education and support as a neutral financial and tax professional in collaborative divorce, divorce mediation, and consulting and testifying in traditional divorce cases. Ms. Panther has presented a variety of training programs for collaborative divorce, mediation, and financial

## Seminar Information

**Scarritt-Bennett Center**  
1027 18th Avenue South  
Nashville, TN 37212  
(615) 340-7500

**Tuition**  
**\$299** for individual registration  
**\$279** for three or more registrants from the same company at the same time.

**Included with your registration:** Complimentary continental breakfast and printed seminar manual.

**Receive a reduced tuition rate of \$101** by registering to be our on-site coordinator for the day. For availability and job description, please visit [www.halfmoonseminars.org](http://www.halfmoonseminars.org).

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- Visit us online at [www.halfmoonseminars.org](http://www.halfmoonseminars.org)
- Mail-in or fax the attached form to 715-835-6066
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**Cancellations:** Cancel at least 48 hours before the start of the seminar, and receive a full tuition refund, minus a \$39 service charge for each registrant. Cancellations within 48 hours will receive a credit toward another seminar or the self-study package. You may also send another person to take your place.

and taxation topics. She serves her practice group, the Middle Tennessee Collaborative Alliance, as president, is a member of the training faculty for the International Academy of Collaborative Professionals (IACP) and serves on several education committees for IACP. She also offers training for collaborative divorce practitioners through the Institute for Family Conflict Resolution, of which she is a principal member.

**Aaron G. Walsh** is an attorney at WalshLaw, LLC. He received his law degree in 2003 from the University of South Carolina. While there, he clerked for a local law firm and worked on the student staff of the *ABA Real Property, Probate, and Trust Journal*. After graduation, Mr. Walsh spent time working in a law firm and as an assistant public defender before settling into private, solo, practice in 2007. His primary focus is family and domestic law, though he continues to defend criminal cases at all levels. Mr. Walsh is admitted to practice in South Carolina and Tennessee.

**Jane Ellen Cassell** is an attorney at The Cassell Law Firm. Her primary focus is on immigration law, and family and divorce litigation. Drawing on her experience in navigating complex immigration matters including deportation and removal proceedings, visas, humanitarian petitions, and waivers of admissibility, Ms. Cassell is an advocate for the immigrant community. She is also an assertive and passionate family law attorney who helps her clients through difficult divorce, child support, custody, and adoption matters with a deliberate aim to achieve the best results for their families. Ms. Cassell is licensed in the state of Tennessee and has also been admitted to practice before the U.S. District Court of Middle Tennessee and the Executive Office of Immigration Review (EOIR). She is a member of the American Immigration Lawyers Association (AILA), Belmont University American Inns of Court, the American Bar Association, and Lawyer’s Association for Women: Marion Griffin Chapter.

## Additional Learning

### Estate Planning Audio Recording and Self-Study Package

Available on CD, USB drive, or as a digital download, this package covers topics including:

- Federal Tax Law and Its Impact on Planning
- Fundamentals of Estate Planning
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# Registration

## Tennessee Family Law Practice for Paralegals

Nashville, TN - Wednesday, May 13, 2020

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