

Agenda

Assisting with Family Law Case Intake

C. Kaplan

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

Preparing Pleadings and Assisting with Motion Practice

C. Kaplan

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

Obtaining and Evaluating Financial Information

M. Perreault

- 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 you have obtained
- Working with accountants and financial experts
- Preparing financial statements

Assisting with Child Custody, Placement, Third-Party Visitation

T. Highstrom

- Overview of Wis. Stat. 767.41 and 767.451
 - Definitions of “custody” and “placement”
 - Marriage vs. paternity cases
- Visitation under Wis. Stat. 767.43
 - A “relationship similar to a parent-child relationship with the child”
 - Grandparent visitation rights
 - Third-party placement vs. grandparent visitation
 - What does this mean for step-parents
- Obtaining relevant information
 - Client interviews
 - Proposed parenting plans
 - Formal discovery
 - Custody questionnaires
 - Authorizations for information
 - Using social media
- Working with Guardian-ad-Litem
- Working with experts
- Drafting tips and tricks
- General professional tips

Enforcing and Modifying Family Law Orders and Decrees

C. Kaplan

- Implementing divorce decrees and orders
 - Preparing and filing the decree
 - Preparing other necessary documents
 - Enforcing judgments and orders
- Modifying decrees and orders
 - Determining which parts of a decree or order are subject to modification, deciding when to seek modification
- Assisting in modification actions

Handling Ethical Issues in Family Law Practice

C. Kaplan

- Complying with rules of professional responsibility and ethics guidelines for attorneys and paralegals
- Avoiding conflicts of interest
- Maintaining client confidentiality
- Avoiding the unauthorized practice of law
- Working with the secretive or dishonest client
- Handling allegations of abuse or neglect
- Zealous (vs. over-zealous) representation
- Fee agreements, retainers, and collection of unpaid fees

Wisconsin Family Law Practice for Paralegals

Live, Interactive Webinar - Wednesday, March 31, 2021

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Learning Objectives

You'll be able to:

Assist with initial client interviews, and help prepare initial pleadings and requests for relief.

Obtain information on assets, debts, income and expenses, and assist with the preparation of financial statements.

Work on issues involving child custody, placement and third-party visitation.

Learn about implementing divorce decrees and orders, and discuss which parts of an order are subject to modification.

Comply with rules of professional responsibility and avoid the unauthorized practice of law.



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Wisconsin Family Law Practice for Paralegals

Live, Interactive Webinar - Wednesday, March 31, 2021



Get tips on assisting with family law case intake

Assist with the preparation of pleadings and motions

Obtain and **evaluate** financial information

Assist with child custody, placement and third-party visitation

Work on enforcement and modification of existing family law orders

Handle ethical issues in family law practice

Continuing Education Credits

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

NALA: 6.5 CLE Hours (1.0 Ethics)
NFPA: Pending



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Faculty

Corinne Kaplan is president and shareholder of Kaplan Law Firm, S.C. Ms. Kaplan has been practicing law for over 30 years. A graduate of Indiana University for both her undergraduate and graduate educations, she received an undergraduate degree in Political Science and a J.D degree with specialties in Taxation and Securities. Attorney Kaplan was admitted to the State Bar of Wisconsin in 1984. While an extremely skilled family law practitioner, she is also very well versed in real estate law, business and taxation law, personal injury law, and sport law. Attorney Kaplan served as the 2010 president of the Ozaukee County Bar Association. Besides law, Ms. Kaplan has been a professor at Cardinal Stritch University teaching a wide range of courses which allows her to remain current both in technology and in legal issues.

Michele L. Perreault is an equity partner in the Madison office of DeWitt LLP, where she serves as chair of the Family Law Practice Group. Ms. Perreault has represented over 1,000 clients with their family law matters. In addition to her family law litigation experience, she has successfully litigated cases ranging from estate disputes to multi-million dollar property tax disputes. Ms. Perreault also serves as an adjunct professor at the University of Wisconsin Law School, teaching classes related to family law as well as constitutional law.

Tiffany Highstrom is a partner at Stafford Rosenbaum LLP in Madison. She is past chair of the State Bar of Wisconsin Family Law Section and serves on the Editorial Board for the *Wisconsin Journal of Family Law* and is a regular contributor. She serves on the Collaborative Family Law Council of Wisconsin’s Board of Directors and has been recently been appointed by the Wisconsin State Bar to the Section Leaders Council Board as a liaison to the Legislative Oversight Committee. She was also part of the 2018 Joint Legislative Council Study Committee on Child Placement and Support and is a past member of the Child Support Advisory Panel. Ms. Highstrom currently serves on the Board of Directors Wisconsin Association of Family and Conciliation Courts, and is a member of the Family Law Section of the American Bar Association. She received her B.A. degree in Political Science and English from Ball State University in 2000 and her J.D. degree from Marquette University Law School in 2004.

Webinar Information

Log into Webinar 8:00 - 8:30 am CDT	Break 12:00 - 12:30 pm CDT
Morning Session 8:30 am - 12:00 pm CDT	Afternoon Session 12:30 - 4:00 pm CDT

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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 Wisconsin paralegals. The National Association of Legal Assistants has approved it.

HalfMoon Education has applied to the National Federation of Paralegal Associations for course approval, which is pending. Visit www.halfmoonseminars.org for current credit information under this webinar listing.

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Registration

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