

Agenda

Assisting with Family Law Case Intake Performing conflicts checks Assisting with initial client interview Preparing engagement letter, opening file Collecting information	<i>K. O'Keefe D. Howe</i>
Preparing Pleadings and Assisting with Motion Practice Preparing initial pleadings Requesting temporary relief Preparing for the temporary orders hearing Preparing the temporary orders	<i>K. O'Keefe D. Howe</i>
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 you have obtained Working with accountants and financial experts Preparing financial statements	<i>J. Deach</i>
Assisting with Child Custody and Visitation Issues Recent developments in Minnesota custody law Obtaining relevant information Client interview, custody questionnaires, authorizations for disclosure, formal discovery Working with guardian-ad-litem Working with experts Drafting and reviewing parenting plan	<i>S. Krueger</i>
Overview of Tax Issues Involved in Divorce Filing status implications Dependency exemptions Tax credits Hidden tax implications in child support Taxable v. non-taxable property distribution Tax consequences of spousal maintenance	<i>J. Brown</i>
Handling Ethical Issues in Family Law Practice 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	<i>R. Johnsen</i>

Minnesota Family Law Practice for Paralegals

Live, Interactive Webinar - Friday, October 29, 2021

NON-PROFIT
U.S. POSTAGE PAID
EAU CLAIRE, WI
PERMIT NO. 2016

HalfMoon Education Inc.
PO Box 278
Altoona, WI 54720-0278



Learning Objectives

You'll be able to:

- Assist** with initial client interviews and prepare initial pleadings.
- Identify** and obtain relevant information on client assets, debts, income and expenses.
- Work** effectively with divorce clients, financial experts, and guardians-ad-litem.
- Review** recent developments in custody law, and assist with the preparation of parenting plans.
- Identify** important tax issues that arise in divorce.
- Maintain** client confidentiality and avoid the unauthorized practice of law.



HalfMoon Education Live Webinars

Minnesota Family Law Practice for Paralegals

Live, Interactive Webinar - Friday, October 29, 2021



- Learn** how to assist with initial client interviews
- Maintain** professionalism and establish good communication with clients
- Discuss** preparation for temporary hearings
- Examine** ethical issues in family law practice
- Explore** child custody and visitation issues
- Obtain** and evaluate financial information

Continuing Education Credits

This webinar offers paralegals 6.5 CLE hours, including 1.0 ethics hour

NALA Approved
NFPA Approved



Faculty

Kendal K. O’Keefe *Attorney with Arnold, Rodman & Kretchmer PA, in Minneapolis*
Ms. O’Keefe has devoted her practice exclusively to family law, including divorce, custody and parenting time issues, spousal maintenance and child support. She is also a Rule 114 qualified neutral and offers family mediation services. Ms. O’Keefe is admitted to practice by the Minnesota Supreme Court and the United States District Court for the District of Minnesota. She serves as a board member of the Family Law League, a social and educational event-planning organization for family law practitioners that have been practicing for less than ten years. Ms. O’Keefe volunteers with Tubman, a family violence prevention organization in the Twin Cities, and has presented continuing legal education classes through Minnesota CLE and other providers.

Denise D. Howe *Lead Paralegal with Arnold, Rodman & Kretchmer PA in Minneapolis*
Ms. Howe earned her bachelor’s degree from California State University, Fullerton. She completed an ABA-approved paralegal program at the Minnesota Paralegal Institute. Ms. Howe is a member of the Minnesota Paralegal Association and the National Federation of Paralegal Associations.

Jana Deach *Attorney at Moss & Barnett in Minneapolis*
Ms. Deach is a nationally recognized family law practitioner who serves as a compassionate advocate for clients and their children. Knowledgeable and responsive, she is committed to understanding her clients’ needs and working with them to achieve positive outcomes. Ms. Deach strives to resolve matters outside the courtroom to minimize distress and disruption, but when the parties cannot reach a consensus, she is fully prepared to represent her clients’ interests at trial. Ms. Deach believes that every client deserves dedicated, competent guidance throughout their family court proceeding, culminating in a conclusion that prepares her clients to confidently move forward. She earned her B.A. degree from the University of North Dakota and her J.D. degree, with distinction from the University of North Dakota School of Law.

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

Tuition
\$289 for individual registration
\$239 for three or more registrants from the same company at the same time.
Included with your registration: PDF seminar manual.

How to Register

- Visit us online at www.halfmoonseminars.org
- Mail-in or fax the attached form to 715-835-6066
- Call customer service at 715-835-5900

Webinars are presented via GoToWebinar. Instructions and login information will be provided in an email sent close to the date of the webinar. For more information, please visit our FAQ section of our website, or visit www.gotowebinar.com.

Cancellations: Cancel at least 48 hours before the start of the webinar, and receive a full tuition refund, minus a \$39 service charge for each registrant. Cancellations within 48 hours will receive a credit toward another webinar or the self-study package. You may also authorize another person to take your place.

Sherri Krueger *Partner at Krueger & Juelich, PLLC in Minnetonka*
Ms. Krueger is an attorney practicing exclusively in the area of family law. As a Rule 114 qualified neutral, she provides mediation services for parties going through marriage dissolution and custody proceedings. She is committed to helping parents find good child-focused solutions to the disputes they face in their divorce and custody matters. Ms. Krueger strives to provide practical options and solutions for her clients and uses her knowledge of the law to develop plans that will help families long-term. She received her J.D. degree, *cum laude*, from William Mitchell College of Law and received a B.S. degree in Paralegal Studies, *magna cum laude*, from Winona State University.

Jason Brown *Attorney at Barna, Guzy & Steffen in Coon Rapids*
Mr. Brown is a shareholder with Barna, Guzy & Steffen, Ltd. He has been repeatedly recognized as a Super Lawyer in the area of family law by Thomson Reuters. He has represented a wide variety of family law clients over the last 20 years, including teachers, homemakers, union construction workers, doctors, truck drivers, accountants, business owners, engineers, mortgage brokers and Fortune 500 executives. Many of his cases have involved custody disputes, alimony claims, and high net worth individuals, including several divorces in which the value of the marital estate exceeded ten million dollars. In addition to his work as a lawyer, Mr. Brown provides mediation services for family court litigants.

Ruta Johnsen *Attorney Nancy Zalusky Berg, LLC, in Minneapolis*
Ms. Johnsen is a family law attorney and her practice includes areas of marriage dissolution, custody and parenting time matters, child support, paternity, spousal maintenance, international family law, child in need of protection and services, termination of parental rights proceedings, and appeals. Her background in child protection and juvenile justice gives her a distinctive perspective in working with families going through a variety of family transitions such as dissolution, custody disputes and child protection proceedings. Ms. Johnsen graduated from the Mitchell Hamline School of Law where she was a recipient of the Student Award of Merit. She is admitted to practice in the state of Minnesota and Federal District Court, District of Minnesota.

Additional Learning — Estate Planning Self-Study Webinar

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
- Retirement Asset Planning
- Charitable Planning
- Ethical Considerations in Estate Planning
- and more!

Included with each purchase and written exclusively for HalfMoon Education is a comprehensive 200+ page manual written by Matthew A. Bovino, Daniel L. Daniels, David T. Leibell, Michael T. Clear, and Beth Ann Brunalli.

Visit our self-study section at www.halfmoonseminars.org to learn more!

Can’t Attend?
Order the Webinar as a Self-Study Package!
Recordings of this webinar are available for purchase. 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.

Registration

Minnesota Family Law Practice for Paralegals
Live, Interactive Webinar - Friday, October 29, 2021

How to Register		Registrant Information Name: _____ Company/Firm: _____ Address: _____ City: _____ State: _____ Zip _____ Occupation: _____ Email: _____ Phone: _____ Additional Registrants: Name: _____ Occupation: _____ Email: _____ Phone: _____ Name: _____ Occupation: _____ Email: _____ Phone: _____ Email address is required for credit card receipt, program changes, and notification of upcoming seminars and products. Your email will not be sold or transferred. () I need special accommodations. Please contact me.
Online: www.halfmoonseminars.org		
Phone: 715-835-5900		
Fax: 715-835-6066	Code:	
Mail: HalfMoon Education Inc., PO Box 278, Altoona, WI 54720-0278		
Complete the entire form. Attach duplicates if necessary.		

Tuition () I will be attending the live webinar. Single Registrant - \$289.00 . Three or more registrants from the same company registering at the same time - \$239.00 each. () I am not attending. Please send me the webinar recording: ☐ Streamable MP4 Video/PDF Manual for \$299.00 . ☐ USB Video/PDF Manual for \$299.00 .
Checks: Make payable to HalfMoon Education Inc. Credit Card: <i>Mastercard, Visa, American Express, or Discover</i> Credit Card Number: _____ Expiration Date: _____ CVV2 Code: _____ Cardholder Name: _____ Billing Address: _____ City: _____ State: _____ Zip: _____ Signature: _____ Email: _____
© 2021 HEI #21 MNFAMLPP 10 29 WEBR BA