

Agenda

Basics of Law Office Management and Operation

S. Bowman

- Law office organization
- Staff roles and responsibilities
- Awareness of attorney regulation and ethics rules
- Managing contacts with potential clients and other law firms
- Participating in client intake process
- Creating, organizing, and maintaining files
- Client communications
- Client billing and accounting practices

Basics of State Civil Litigation

C. Erick

- Types of civil matters
- State court vs. federal court practice
- Prerequisites for litigation
- Alternatives to litigation: mediation, arbitration, negotiation
- The civil discovery process
- Preparing for trial
- Civil trials
- Post-judgment matters and appeals

Locating Sources of Law

A. Hickman Pierson

- Sources of Federal laws and regulations
- Sources of state laws and regulations
- Finding case law
- Using secondary sources
- Evaluating sources and information obtained

Legal Ethics for Legal Assistants

G. Sapelli

- Attorney and paralegal ethical rules
- Specific areas of concern for legal support staff:
 - Conflicts of interest
 - Confidentiality
 - Ex-parte communications
- Avoiding the unauthorized practice of law
- Working with clients, courts and opposing counsel

Document Drafting and Editing

S. Everts

- Legal terminology
- Drafting legal documents
- Editing legal documents
- Updating legal references
- Proofreading skills

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Fundamentals of Legal Assisting

Live, Interactive Webinar - Tuesday, June 4, 2024

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Learning Objectives

You'll be able to:

Create, organize and **maintain** law office files.

Get an overview of the civil litigation process.

Locate sources of statutes, administrative regulations and case law.

Be aware of potential ethical issues and avoid the unauthorized practice of law.

Get tips on drafting and editing legal documents.

HalfMoon Education Inc.,
Your LIVE Education Leader Presents

Fundamentals of Legal Assisting

Live, Interactive Webinar - Tuesday, June 4, 2024



Explore law office management and operation

Learn about legal document drafting and editing

Discuss the basics of litigating in state courts

Recognize potential ethical issues

Get tips on locating statutes, administrative rules and case law

Continuing Education Credits

Paralegals

6.0 CLE Hours (Incl. 1.0 Ethics Hour)

National Association of Legal Assistants (NALA)

6.0 CLE Hours
3.5 Substantive CLE Hours
1.5 Non-substantive CLE Hours
1.0 Legal Ethics CLE Hour

National Federation of Paralegal Associations (NFPA)

6.0 CLE Credits
5.0 General CLE Credits
1.0 Ethics CLE Credit



Webinar Information

Online - Tuesday, June 4, 2024

Log into Webinar

8:00 - 8:30 am CDT

Break

11:45 am - 12:15 pm CDT

Morning Session

8:30 - 11:45 am CDT

Afternoon Session

12:15 - 3:30 pm CDT

Tuition

\$339 for individual registration.

\$309 for two or more registrants from the same company at the same time.

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Faculty

Sara Bowman

Program Director of Paralegal Studies at Oakland Community College

Ms. Bowman was born and raised in Farmington Hills, Michigan, attending Farmington public schools. She next attended New York University and obtained a bachelor's degree. Upon returning to Farmington, she took classes at Oakland University, earning a post-bachelor Certificate in Paralegal Studies. After spending several years working in various practice areas, Ms. Bowman ultimately landed with the regional insurance defense firm Kopka Pinkus Dolin in 2005. Over her 18-year career with KPD, she transitioned from trial paralegal to litigation manager, and was ultimately the legal operations manager in which she oversaw three Michigan offices and managed 70 direct reports. Ms. Bowman began the next phase of her career in January 2023 where she now serves as the program director of Paralegal Studies at Oakland Community College. She served on the Farmington Planning Commission from 2008-2015 before being elected to the Farmington City Council in 2015. She served as mayor on the Council from 2019-2023. Ms. Bowman lives in Farmington with her husband of 23 years. Their son is an explosive ordnance disposal technician in the United States Navy.

Casey S. Erick *Shareholder at Cowles & Thompson P.C. in Dallas*

Mr. Erick focuses on commercial litigation and employment law. He has represented clients in both litigation and transactional matters that span across commercial law, labor and employment, real estate, consumer protection and general litigation including, but not limited to breach of contract, corporate trade secret theft, tortious interference, defamation, personal injury, fraud, and various other kinds of civil litigation. Mr. Erick is a member of the State Bar of Texas and The Dallas Bar Association. He earned his B.A. degree, *cum laude*, from the University of Mississippi and his J.D. degree from Baylor School of Law.

Annalee Hickman Pierson

Head of Reference and Faculty Services at Brigham Young University Law Library

Ms. Hickman Pierson is a law library faculty member at Brigham Young University. She is a professor for the first-year legal research courses at BYU Law. She happily joined the law library faculty at BYU in 2016 shortly after completing a J.D. degree at BYU Law and has since completed her M.L.I.S. from San José State University. Professor Hickman Pierson's scholarship focuses on legal reference services, legal research instruction, legal education, and law librarianship. She is extensively involved in the law librarianship profession, serving as a chair of many committees through the American Association of Law Libraries (AALL) and her regional AALL chapter WestPac. She is also serving a four-year term as an editorial board member of *Legal Writing: The Journal of the Legal Writing Institute*.

Giancarlo Sapelli

Attorney with Warner Angle Hallam Jackson & Formanek in Phoenix

Mr. Sapelli focuses his practice primarily on domestic relations. He offers experience representing clients in all family law-related matters. These include divorce, with or without children, and all issues that may arise in both types of cases. Mr. Sapelli effectively and compassionately advances his clients' interests in matters involving legal decision-making, parenting time, child support, division of property and debts, spousal maintenance, and other issues. He also has experience in complex divorce matters including complex custody and property issues. Aside from divorce matters, Mr. Sapelli's practice also focuses on paternity issues and third-party rights issues. Mr. Sapelli attended The S.J. Quinney College of Law at the University of Utah. In law school, he was the assistant to the editor of the *Utah Journal of Family Law*. Mr. Sapelli earned a bachelor's degree in Political Science from the University of Arizona and has a master's degree in Educational Leadership from Northern Arizona University. After an eight-year term of teaching junior high school, Mr. Sapelli's love for family and children inspired him to work in family law. That same passion continues to inspire him today.

Steven H. Everts *Partner with Udall Shumway, PLC i Mesa, AZ*

Mr. Everts has practiced law for more than 44 years and has represented and counseled thousands of clients in family law matters. He is a fellow of the American Academy of Matrimonial Lawyers, a board-certified specialist in family law by the Arizona State Bar, as well as a board certified advocate in family trial Law by the National Board of Trial Advocacy. Mr. Everts is asked to serve frequently as judge and commissioner pro-tem for the Family Law section of the Maricopa County Superior Court where he has served for 20 years. He has been selected for inclusion in Southwest Super Lawyers and The Best Lawyers in America every year from 2010 to present.

Credit Information

This webinar is open to the public and is designed to qualify for 6.0 CLE hours, including 1.0 ethics hour, to paralegals and legal assistants in most states. Paralegal certification is not required to participate in this course. Please refer to specific state rules to determine eligibility.

The National Association of Legal Assistants (NALA) has approved this course for a total of 6.0 qualified CLE hours which includes 6.5 substantive CLE hours, 1.5 non-substantive CLE hours and 1.0 legal ethics CLE hours.

The National Federation of Paralegal Associations (NFPA) has pre-approved this webinar for 6.0 total CLE credits, which includes 5.0 general CLE credits and 1.0 ethics CLE credit.

Attendance will be monitored, and attendance certificates will be available after the webinar for those who attend the entire course and score a minimum 80% on the quiz that follows the course (multiple attempts allowed).

On-Demand Credits

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