

Agenda

Assisting with Family Law Case Intake

J. Echikson

- Performing conflicts checks
- Assisting with initial client interview
- Preparing engagement letter, opening file
- Collecting information
- Preparing initial pleadings
- Requesting temporary relief
- Preparing for the temporary orders hearing
- Preparing the temporary orders

Obtaining and Evaluating Financial Information

K. Sheriff

- 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

Working With Divorce Clients and Opposing Counsel

K. Sheriff
J. Echikson

- 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

K. Sheriff
J. Echikson

- 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

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Pennsylvania Family Law Practice for Paralegals

Live, Interactive Webinar - Friday, July 26, 2024

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PO Box 278
Altoona, WI 54720-0278



Learning Objectives

You'll be able to:

Assist with the preparation of engagement letters and initial family law case pleadings.

Obtain relevant financial information on client assets, debts, income and expenses.

Work with accountants and financial experts and prepare financial statements.

Handle relationships with difficult clients.

Maintain professionalism while working with the courts and opposing counsel.

Handle ethical issues in family law practice and avoid the unauthorized practice of law.



HalfMoon Education Inc.,
Your LIVE Education Leader Presents

Pennsylvania Family Law Practice for Paralegals

Live, Interactive Webinar - Friday, July 26, 2024



Assist with family law case intake, including performing conflict checks

Identify relevant information on assets, debts, income, and expenses

Work with accountants and financial experts while evaluating financial information

Main good communication with clients

Discuss techniques for working with courts and opposing counsel

Comply with rules of professional responsibility and **review** ethic guidelines for attorneys and paralegals

Continuing Education Credits

Paralegals

6.0 CLE Hours (Including 1.0 Ethics Hour)

National Federation of Paralegal Associations (NFPA)

6.0 CLE Credits

5.0 General CLE Credits

1.0 Ethics CLE Credit



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Webinar Information

Online - Friday, July 26, 2024

Log into Webinar

8:00 - 8:30 am EDT

Break

11:45 am - 12:15 pm EDT

Morning Session

8:30 - 11:45 am EDT

Afternoon Session

12:15 - 3:30 pm EDT

Tuition

\$339 for individual registration.

\$309 for two 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
- Call customer service at 715-835-5900

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Faculty



Jennifer Echikson *Pennsylvania Certified Paralegal*

Ms. Echikson has been a paralegal working almost exclusively in family law for over 20 years and has been with Materese Family Law in Fort Washington, Pennsylvania, since its inception. Prior to her time at MFL, she worked in the family law departments at the Greater Philadelphia area law firms of Dischell Bartle Dooley, Weber Gallagher, and Wolf Block. Ms. Echikson earned a bachelor of science degree in Paralegal Studies from Peirce College and holds a Pennsylvania paralegal certification from the Keystone Alliance of Paralegal Associations. She currently serves as president of the Montgomery County Paralegal Association. Along with Ms. Sheriff and other paralegals across the Commonwealth, Ms. Echikson is a founding board member of the Family Law Paralegals of Pennsylvania (FLPP), a paralegal association dedicated to providing resources and support to paralegals practicing family law in Pennsylvania. She also currently serves as FLPP's Vice-President and membership chair. In addition, Ms. Echikson is FLPP's primary delegate to the Keystone Alliance of Paralegal Associations, where she also holds the position of Secretary. She is also a member of various community organizations, including serving as an area leader for Free Mom Hugs of Pennsylvania, a board member for the LGBT Equality Alliance of Chester County, and secretary of Soroptimist International of Phoenixville.



Karen Sheriff *R.P., Pennsylvania Certified Paralegal*

Ms. Sheriff is a paralegal with the Cognetti Law Group in Camp Hill, Pennsylvania. She has over three decades of experience as a family law litigation paralegal. Ms. Sheriff assists attorneys and clients in a variety of family law matters with an emphasis on complex property distributions and difficult custody cases. She is a PACE registered paralegal and a Pennsylvania certified paralegal. Ms. Sheriff received her paralegal degree in 1988 from Central Penn College (formerly Central Penn Business School) and subsequently returned and completed her bachelor of science degree in Legal Studies. She is a past president of the Keystone Alliance of Paralegal Associations and still serves on several of its committees. Ms. Sheriff is also a past president of the Central Pennsylvania Paralegal Association and has been a member of the board of directors since 2017. In 2019, she, along with six paralegals from across Pennsylvania, founded Family Law Paralegals of Pennsylvania (FLPP). FLPP is a practice specific paralegal association. Its goal is to provide family law paralegals throughout the state with better access to information and resources relating to family law matters. Through the collective skills of its members, FLPP provides a reliable resource for paralegals practicing family law. Ms. Sheriff is proud to serve on FLPP's Board of Directors where she has held the position of president for the past year.

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 Pennsylvania. Paralegal certification is not required to participate in this course.

The National Federation of Paralegal Associations (NFPA) has approved this webinar for 6.0 total CLE credits, including 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

The preceding credit information only applies to the live presentation. This course in an on-demand format is not pre-approved by any licensing boards and may not qualify for the same credits; please consult your licensing board(s) to ensure that a structured, asynchronous learning format is appropriate.

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