

Agenda

Assisting with Family Law Case Intake

D. Hernandez

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

Obtaining and Evaluating Financial Information

V. Anderson

- 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 and Visitation Issues

S. Kay

- Recent developments in Florida 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 plans

Assisting with Different Types of Agreements

A. Beebe

- Marital settlement agreements
- Pre/post nuptial agreements
- Property agreements
- Child-related agreements
- Support agreements

Handling Ethical Issues in Family Law Practice

S. Kay

- 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

Florida Family Law Practice for Paralegals

Live, Interactive Webinar - Friday, February 28, 2025

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6.5 CLE Hours (Incl. 1.0 Ethics Hour)

Florida Family Law Practice for Paralegals

Live, Interactive Webinar - Friday, February 28, 2025

This webinar agenda covers key tasks involved in assisting in family law cases, including client intake, conflicts checks, and preparation of engagement letters and financial statements. You'll get tips on obtaining and evaluating financial and custody-related information, and you'll learn about working with experts, as well as drafting various family law agreements. The agenda also highlights ethical considerations, emphasizing compliance with professional responsibility rules, maintaining confidentiality, and navigating challenges such as conflicts of interest and sensitive client situations.

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Webinar Information

Online - Friday, February 28, 2025

Log into Webinar

8:00 - 8:30 am EST

Break

11:30 am - 12:00 pm EST

First Session

8:30 - 11:30 am EST

Afternoon Session

12:00 - 4:00 pm EST

Tuition

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Faculty

Dolly Hernandez *Partner at Rafool, PLLC, in Miami*

Ms. Hernandez represents high-net-worth individuals in complex marital and family law matters. She assists individuals in the dissolution of marriage, equitable distribution, alimony, child support, parenting and time-share issues, paternity, and prenuptial agreements. Ms. Hernandez has obtained the AV Preeminent peer review rating through Martindale-Hubbell. In addition, she has been selected for inclusion in the Super Lawyers list since 2014, including Top 100: Miami Super Lawyers in 2018, 2020-2022 and Top 50: Women Florida Super Lawyers in 2015 and 2018, The Best Lawyers in America list since 2019, Florida Trend's Legal Elite list, and South Florida Legal Guide's Top Lawyers list. In addition, Ms. Hernandez is a Fellow of The American Bar Foundation and is a graduate of the University of Miami School of Law.

Victoria L. Anderson

Owner at Anderson & Ferrin, Attorneys at Law, P.A., in Orlando

Ms. Anderson primarily practices in the areas of domestic and family law, criminal law, and bankruptcy. Ms. Anderson's over 12 years of experience in these areas of law has given her a unique ability to not only achieve results but to assist clients though difficult, complicated and sometimes incredibly emotional events. She received her bachelors degree in Political Science from the University of Central Florida and a J.D. degree from Barry University School of Law, where she received a certificate for completing a concentration in the areas of children and family law. Ms. Anderson has worked in the legal field since 1997 and since then has worked at all levels within private law firms. Ms. Anderson has been involved in the following organizations and affiliations: American Bar Association, The Florida Bar (Family, Criminal and Young Lawyers Division), and Orange County Bar Association. Additionally, Ms. Anderson is an adjunct professor for Seminole State College as well as Bryant & Stratton. Ms. Anderson was a former adjunct professor for Barry University, Kaplan University and Everest University.

Sarah E. Kay, Esq. BCS

Managing Member at Kay Family Law PLLC in Tampa

Ms. Kay assists Florida's families as a Florida Supreme Court Certified Family Law and Appellate Mediator and a collaborative attorney. She also extends her expertise to solo and small firms throughout Florida with freelance research, writing, and consulting services. Ms. Kay served as the chair of the Family Law Section of The Florida Bar during its 50th anniversary year (2023-2024), as president of the Hillsborough Association for Women Lawyers (2017-2018), president of the Hillsborough County Bar Association Leadership Institute Class of 2013, and the co-chair of the Hillsborough County Bar Association 5k Pro Bono River Run Committee in 2013 and 2014. Ms. Kay is Board Certified in Marital and Family Law by The Florida Bar and is a Fellow of the American Academy of Matrimonial Lawyers (AAML). She holds a J.D. degree, a master's degree in Education and a master's degree in Business Administration.

Abigail "Abby" Beebe, Esquire *Beebe Law in West Palm Beach*

Ms. Beebe practices exclusively in the area of marital and family law. She is Board Certified in Marital and Family Law by The Florida Bar, and she is a Fellow in the American Academy of Matrimonial Lawyers (AAML) and International Academy of Family Lawyers (IAFL). Ms. Beebe is a member of the Family Law Section of The Florida Bar, the Palm Beach County Bar Association, Florida Association of Woman Lawyers and the Palm Beach County Greenberg Gamot Family Law American Inn of Court. Ms. Beebe is a past chair of the Family Law Section of The Florida Bar (2018-2019). She was elected to the Executive Committee of the Family Law Section in 2015 and served as the secretary from 2015-2016; treasurer from 2016-2017; the chair-elect 2017-2018; and chair 2018-2019. She also served on the Executive Council from 2010 until her appointment on the Executive Committee. Ms. Beebe currently sits on the Board of Directors for the Legal Aid Society of Palm Beach County, where she began her legal career in 2006. She has been recognized as Florida Rising Star from 2017-2019 and a Super Lawyer from 2021 to present.

Credit Information

This webinar is open to the public and is designed to qualify for 6.5 CLE hours, including 1.0 ethics hour, for paralegals. Paralegal certification is not required to participate in this course.

Courses approved for credit by the National Federation of Paralegal Associations (NFPA) are deemed acceptable for Florida Registered Paralegals (Rule 20-6.1).

This course has been approved by the National Federation of Paralegal Associations (NFPA) for 6.5 total CLE credits, which includes 5.5 general credits and 1.0 ethics 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).

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