

# 2023 NALA CONFERENCE & EXPO

JULY 12-14 | BOSTON, MA  
THE WESTIN COPLEY PLACE

*Experience the Largest Gathering  
of Paralegals  
and Legal Support Professionals*

 **NALA** | THE PARALEGAL  
ASSOCIATION

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# A Personal Invitation



NALA's 2023 conference will be held in Boston, MA, from July 12-14. I would like to personally invite you to join us for what promises to be an unforgettable event. You can expect wonderful speakers and valuable educational sessions. You will be able to network with legal professionals and industry experts from across the nation.

These are three days you do not want to miss. Over 90% of last year's conference attendees enjoyed their time, and nearly half of them were first timers. You will have the chance to earn up to 13 CLE credits while learning more about recent decisions, suggested best practices, and how to navigate the paralegal profession. With dozens of exhibitors, 30 different educational sessions, association and affiliate business meetings, and lots of exciting Boston sites, there will be plenty to do.

Let Boston be the backdrop for a transformative experience. [Register today](#) to attend NALA's 2023 conference. I look forward to seeing you there.

Sincerely,

A handwritten signature in white ink that reads "Debra L. Overstreet, ACP". The signature is fluid and cursive.

Debra L. Overstreet, ACP, NALA President



# Who We Are

Since 1975, NALA has been providing outstanding continuing education and professional development that propels paralegals and other legal professionals forward, helping them take their careers to the next level. NALA connects members nationwide and opens a portal to knowledge and opportunity.

## Certification

Earn a globally-recognized certification, the national standard for paralegals, available only through our process. This credential is a proud achievement and career-long commitment. Our Certified Paralegal Program is accredited by the NCCA and acknowledged by the American Bar Association as a mark of high professional achievement.

## Education

Paralegals need to stay up to date on the ever-changing legal field. This is why we provide specialized online education opportunities on a variety of legal topics. Learn from industry experts and expand your knowledge base. We offer live and on-demand webinars, self-study courses, leadership development, complimentary education, and events.

## Membership

We are a member-driven association, meaning our members are the key to our success. Their dedication, participation, and enthusiasm within both our community and the field are the reasons we are incredibly successful. Joining NALA gives you access to a number of benefits that can help you advance your paralegal career.



2023 NALA CONFERENCE & EXPO

[nala.org](http://nala.org)



# About This Year's Conference

The wait is over! We can finally spill the tea! This year's NALA Conference & Expo will be held in Boston from July 12-14. Registration is now open! If you want to take your career to the next level, connect with other legal professionals, and learn from the best of the best, do not miss out on the opportunity to attend this year's conference. It is the perfect way to gain insight, expand your network, and stay up to date with the latest legal trends and best practices. If you are hoping to become a Certified Paralegal, the NALA conference offers a special CP Review track of classes to help you prepare for the exam.

Registering for the conference is simple. Visit our website, choose the attendance option that works best for you, and register! We offer in-person, virtual, and single-day pass options. Early bird pricing is available for a short period of time, so secure your spot before prices go up! With 30 educational sessions, an array of excellent speakers, meetings, and an Expo Hall, there is something for everyone at the NALA conference.

The historic city of Boston is the perfect backdrop for a conference that is all about innovation and growth. From the renowned Museum of Fine Arts to one of the oldest public libraries in the nation, Boston is a hub of creativity and opportunity. With so many iconic landmarks, museums, and restaurants to explore, you will have plenty of ways to unwind and recharge after a long day of learning. Do not wait any longer to register for the 2023 NALA Conference & Expo in Boston! Be in the now. Be in the know. Be NALA.

**Be in the now.  
Be in the know.  
Be NALA.**

# Who Should Attend?

## Paralegals

Are you a paralegal looking to take your career to the next level? Prioritizing your professional development is key to enhancing your skills and knowledge, increasing your marketability, and opening new career opportunities. The NALA Conference & Expo offers educational sessions, CLE credits, and networking opportunities that will help you stay up to date with the latest legal practices while connecting with other professionals in the field. Do not miss out on this fantastic opportunity to invest in yourself and your future as a paralegal.

## Those Preparing for the CP Exam

Are you looking to take your career to the next level with a NALA Certified Paralegal (CP) credential? Are you already a CP applicant? Either way, you will not want to miss the upcoming NALA Conference & Expo and the CP Review track. Not only will you have the opportunity to network with other legal professionals, but if you attend in-person, you will also receive the 2023 conference bundle for free! The best part is you can watch all the CP Review sessions as many times as you want in the future. Do not miss out on this incredible opportunity to elevate your career and become a NALA Certified Paralegal.

## Paralegal Students

Are you a paralegal student looking for opportunities to enhance your skills and build your professional network? Look no further than the 2023 NALA Conference & Expo. Join us and immerse yourself in all things paralegal, from the CP Review track to discussions with seasoned paralegals and other legal professionals. Connect with fellow students and industry experts, and take advantage of opportunities to find mentors, resources, and employment opportunities. This conference is a priceless experience to prepare yourself for a successful future as a legal professional!

# Who Should Attend?

## Legal Administrators & HR Managers

Are you looking to give your paralegals the edge when it comes to preparing for the NALA CP Exam? Then the NALA conference is a must-attend event. It is an opportunity to get up to date information on all the latest trends, network with other firms, and learn all the knowledge, skills, and abilities that Certified Paralegals need to be successful. This is your chance to help your staff grow and develop into top-tier professionals.

## Paralegal Educators

Are you looking to stay ahead of the curve and provide your students with the best possible resources for their future careers? Look no further than the [2023 NALA Conference & Expo](#)! Join us to learn about the NALA Certified Paralegal (CP) credential and how it can help you advance your paralegal certificate programs. Gain insights into the skills and knowledge required to be a successful paralegal, as well as the latest challenges and emerging trends in technology and the legal industry. This is your chance to build your program curricula and equip your students with the tools they need to succeed. Take your paralegal program to the next level!



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# What Do Others Think?

Here is What NALA 2022 Conference Attendees Said

"This was my second time attending the NALA conference, both times virtual. Honestly, I would not be able to attend unless virtual was an option (cost, travel time, etc.). Both years have been an awesome experience. Thank you for providing the virtual option!!!"

"Very informative and the remote option made it very convenient. I would not have been able to attend otherwise."

"I really just enjoyed all of the classes I went to. I walked out knowing a lot more than I thought I would."

"The conference was great. I am so happy I attended, and I learned so much."

"Thanks for making this an amazing experience. Very professional. I am very impressed for my first conference. Keep up the amazing work. The professionalism of this organization was so evident in this conference."

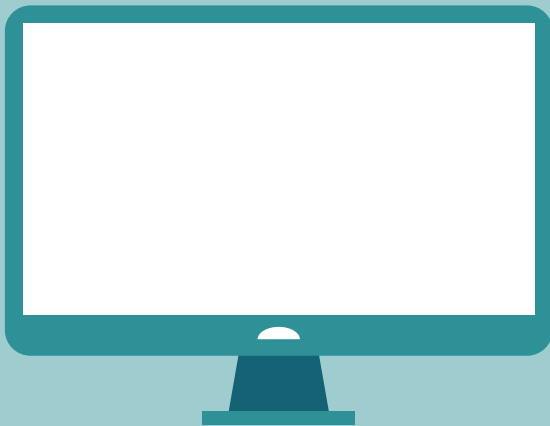
"I learned a tremendous amount about myself and the direction I want my career to go, but my favorite part was the lasting connections I was able to make."

"This was my first in-person conference and I really enjoyed it. NALA is an impressive organization. Very organized, technical, and fun. It was inspiring to be amongst so many paralegals of different experience levels, backgrounds, and skills. Appreciated the swag, food, flexibility, and awesome venue. You made everything easy and fun for me!"

"Awesome to attend virtually to obtain CLE in a short period of time with great speakers and topics."

# What Do Others Think?

## 2022 Conference Attendee Satisfaction



### Virtual

- 80% were very to extremely satisfied
- 80% said that the conference met their expectations
- 78% shared how easy and extremely easy it was to access and navigate the event virtually
- 78% are very likely to attend NALA in-person or virtual events in the future

### In-Person

- 91% were very to extremely satisfied
- 93% said that the conference met their expectations
- 89% are very likely to attend NALA in-person or virtual events in the future



# Registration & Rates

NALA's 2023 Conference & Expo in Boston is an event you do not want to miss. You can experience the conference from the comfort of your home or in the bustling city of Boston. If you cannot attend all three days, we now offer single day passes. NALA's conference is the perfect opportunity to earn CLE credits, learn more about the paralegal profession, visit exhibitors, network with other legal professionals, and see Boston.

## CHOOSE THE BEST PATH TO FIT YOUR SCHEDULE

### **NEW** Single Day Pass

Gain in-person access to all activities during any single day of the conference, earn up to 6 hours of CLE, and get discounted access to the conference recording [bundle](#). You may purchase more than one single day pass, but your best value for two or more days is full in-person registration.

**Wednesday:** Lunch, AA Showcase & Reception, AA Annual Meeting, Panel, Final Board Meeting, Keynote address, Expo Hall, 1 CLE available

**Thursday:** Installation of Officers & Reception, Expo Hall, up to 6 CLE available

**Friday:** New Board Meeting, up to 6 CLE available





# Registration & Rates

## In-Person Attendees

Individuals who attend the conference in person will get to experience the lavish Westin Copley Place in Boston, MA. Participants will be able to acquire up to 13 hours of CLE plus attend a range of exclusive networking and socializing opportunities. Furthermore, in-person attendees will be able to visit the Expo Hall and interact with different vendors face-to-face. In-person attendees will also obtain a conference goodie bag and the entire 2023 NALA conference recording bundle at no extra fee.

## Virtual Attendees

Paralegals attending virtually will have the opportunity to join in the conference proceedings from the convenience of their own residence or workspace. Through participating in the live-streamed educational events, virtual attendees can get up to 13 hours of Continuing Legal Education credits. Furthermore, virtual attendees will have the ability to converse with other conference goers and pose questions to the speakers in all virtual meetings. Lastly, the recorded sessions will be available after the conference at a discounted price.

## How to Register

To register for our conference, please pick the attendee bundle track that suits you best and submit your registration. You can do this either online or by mailing the registration form to our office, by faxing it, or by calling us. When you have completed the process, you will receive an email from NALA to confirm your registration and receive access to the hotel conference rate while rooms are available. Here is how to do it:

1. Visit [www.nala.org/conference](http://www.nala.org/conference) to register online, or
2. Mail the form to 6450 S Lewis Ave, Ste 250, Tulsa, Oklahoma 74136, or
3. Fax it to 918-582-6772, or
4. Call us at 918-587-6828

Please note: Hotel room reservations at the conference discounted rate are only available after you have completed your conference registration and received NALA's email registration confirmation.

# Registration & Rates

## In-Person All Access

Earn up to 13 hours of CLE and receive complimentary access to the recording bundle after conference.

	Member Rate	Non-Member Rate	Student Rate
Early Bird (ends May 12)	\$575	\$625	\$199
Standard Rate (May 13-June 23)	\$645	\$695	\$299
Late Rate (June 24-July 12)	\$695	\$725	\$399

## Virtual Access

Earn up to 13 hours of CLE and get discounted access to the recording bundle (an additional \$50 discount is applied if bundle is purchased prior to conference).

	Member Rate	Non-Member Rate	Student Rate
Early Bird (ends May 12)	\$169	\$209	\$99
Standard Rate (May 13-June 23)	\$199	\$249	\$149
Late Rate (June 24-July 12)	\$249	\$299	\$199

## NEW Single Day Pass

Wednesday Only

Thursday Only

Friday Only

	Member Rate	Non-Member Rate
Early Bird (ends May 12)	\$225/day	\$250/day
Standard Rate (May 13-June 23)	\$250/day	\$275/day
Late Rate (June 24-July 12)	\$275/day	\$295/day

# CLE Information

Verification of attendance for each session will be done by utilizing room scanners for those attending in-person and a check-in button for those attending virtually. After the conference is completed, attendees will receive an email notification from NALA when certificates are available for download.\* The sessions of the 2023 conference are approved to receive CLE credits by the NALA Certifying Board, the State Bar of California, the State Bar of Florida, and the Louisiana State Paralegal Association. If more information relating to CLE is required, please visit our website at [www.nala.org](http://www.nala.org).

\*It may take up to 45 days following the conference for certificates to be made available.

## Checking Into Sessions for CLE

Attendees can choose only one session per time slot. Virtual sessions and the on-location scanners found in each room will turn off approximately 15 minutes after a session has started. If an attendee scans into one session but decides to attend another, only the second session will be valid for CLE.

## Name Badges Required

Conference in-person attendees are required to wear their name badge to access educational sessions, the Expo Hall, lunch, the Affiliated Association Annual Meeting, and the Affiliate Showcase and Reception. Please contact NALA's office for more information if you are only attending the NALA Annual Membership Meeting and/or the Affiliate Meeting.

## Guests Are Welcome

Guests are welcome to join Wednesday's in-person NALA lunch. Lunch tickets may be purchased on-site at the Registration/Help Desk.

Conference attendees and their guests are invited to attend the Installation of Officers on July 13, 2023.



# Conference Bundle

Once again, NALA will be offering the 2023 Conference On-Demand bundle that everyone is always talking about! NALA will record 30 conference sessions, each with the presenter's video, PowerPoint slides, and session handouts, for visual recreation. Plus, the bundle includes a whopping 40 CLE hours! The best part is that in-person three day attendees get it for FREE. Virtual attendees can snag it for just \$199 (members) or \$249 (non-members), and One Day In-Person Attendees can grab it for the same rate. Not able to attend this year? You can still enjoy this incredible resource at the member rate of \$575 or non-member rate of \$625. Get it while it is hot! Check out the purchase options below.

Note: If you already received credit for a session you attended during the live conference either as an in-person attendee or a virtual attendee, you are not eligible to obtain duplicate CLE for the same recorded session. On-demand access to the recordings are available for one-year from the date of purchase.

- **In-person full conference attendee rate: FREE**
- **Virtual conference attendee member rate: \$199; non-member rate: \$249**
- **Single Day Pass attendee member rate: \$199; non-member rate: \$249**
- **Non conference member rate: \$575; non-member rate: \$625**



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# The Westin Copley Place, Boston

Located in Boston's Back Bay neighborhood, the Westin Copley Place is a AAA Four-Diamond hotel that has been offering luxury and comfort for 40 years. It is close to many downtown attractions and boasts an impressive list of amenities, including a restaurant and fitness center. Start your day with a delicious breakfast and end it with a nightcap at Bar 10. When you are ready to sleep, sink into your signature Westin Heavenly® Bed. Your enjoyment of the conference will be exquisitely enhanced by the wonderful, boutique venue.

## HOTEL RESERVATIONS

NALA's exclusive group rate gives you a significant discount, bringing the price down to \$249/night for a single or double room. It is \$30 for each additional guest. The group rate link will be provided in the in-person conference registration confirmation email. You can reserve [online](#) or call 617-262-9600 without the group rate.

NALA conference attendees are permitted to use the group rate for three days before and after the conference to explore Boston.

### **Single/Double Per Night Room Rate: \$249 (+\$30/additional guest)**

The rate for each room includes 2 guests. Additional guests cost \$30/person. The maximum occupancy per room is 3-4, depending on the number and type of beds.

### **Reservations**

Go online to Marriot's [website](#) and choose the dates of your stay, the number of rooms, and the number of adults. The NALA conference begins on the morning of July 12th and concludes on the evening of July 14th. Feel free to stay at the hotel before or after the conference to explore Boston. If you have a group rate code, enter it under Special Rates. The group rate link will be emailed after you register.



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# Silver Sponsors



InfoTrack



QuickData



Logikcull

# Bronze Sponsors



Proof



Registered Agent Solutions, Inc.



TransAtlantic International Legal Solutions



Fairchild Record Search



# Sponsors

## Pre-Conference Registration Happy Hour



Wolters Kluwer



San Francisco Paralegal  
Association

## Lanyards



Cogency Global

# Keynote Speaker



**Catherine A. Sanderson, PhD**

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WEDNESDAY JULY 12, 9:00 AM

Catherine A. Sanderson, PhD, is a nationally-recognized speaker, author, and professor. She currently serves as the Poler Family Professor of Psychology at Amherst College. She received a bachelor's degree in psychology, with a specialization in Health and Development, from Stanford University, and received both masters and doctoral degrees in psychology from Princeton University. Her research has received grant funding from the National Science Foundation and the National Institute of Health. Professor Sanderson has published over 25 journal articles and book chapters in addition to four college textbooks, middle school and high school health textbooks, as well as the Introduction to Psychology course for The Great Courses. In 2012, she was named one of the country's top 300 professors by the Princeton Review.

Professor Sanderson speaks regularly for public and corporate audiences on topics such as the science of happiness, the power of emotional intelligence, the art of aging well, and the psychology of courage and inaction. These talks have been featured in numerous mainstream media outlets, including The Washington Post, The Boston Globe, USA Today, The Atlantic, CNN, and CBS Sunday Morning with Jane Pauley. Catherine serves on several boards, including the Active Bystandership in Law Enforcement (ABLE) Program, Camp Dudley, and the Massachusetts Academy of Ballet. She also writes a weekly blog for Psychology Today - Norms Matter - that examines the power of social influence on virtually all aspects of our lives.

Catherine lives with her husband, Bart Hollander, three children - Andrew, Robert, and Caroline - and two rescue dogs - Daisy and Lilly - in Hadley, Massachusetts.

# 2023 Speakers



*John A. Bermingham, Jr. Esq.*

*Of Counsel,  
Gray Law Group (NJ)*

John Bermingham is a New Jersey attorney with over 17 years of experience. He is of counsel for Gray Law Group. He also provides pro bono services. John has his BS in justice studies, his MBA, and his JD. He received the Adjunct Excellence Award and was voted Faculty Member of the Year from Centenary University. He was Adjunct Professor of the Year twice at Purdue University. John serves on the Board of Supervisors in Upper Mount Bethel, Pennsylvania, where he lives with his wife and two sons. He has written articles, spoken at conference, and done webinars for NALA.



*Kendal Cantrell, ACP*

*Litigation Paralegal,  
Phelps Dunbar (MS)*

Kendal Cantrell received her BA in political science from Millsaps College in 1995 and achieved her CP through NALA in May 2006. She holds ACPs through NALA in Personal Injury/Auto Accidents and Family Law – Child Custody, Support, and Visitation. She has been a paralegal for over 28 years. Kendal has extensive litigation experience in family law/domestic relations cases, personal injury cases, and employment matters. She has served on the Paralegal Advisory Board at Itawamba Community College in Fulton, Mississippi, since 2016. Kendal lives in Amory, Mississippi, with her husband and two sons.



*Mekka Crawford-Franklin*

*Associate Professor, Kennesaw State  
University (GA) & Herzing University (WI)*

Mekka Crawford-Franklin is an associate law professor at Kennesaw State University and an associate professor of legal studies at Herzing University. She sits on the Academic Advisory Board at Herzing University and assists with designing the curriculum to support Herzing University students enrolled in the Legal Studies Program.



*Jill I. Francisco, ACP*

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*Paralegal,  
Dinsmore & Shohl, LLP (WV)*

Jill I. Francisco, ACP, graduated with a BA in criminal justice with a concentration in legal studies from Marshall University. She holds advanced certifications in E-Discovery and Trial Practice. She has been working as a paralegal since 1997. She was charter president of the Legal Assistants/Paralegals of Southern West Virginia and serves as their NALA liaison. She began her NALA service as a member of the Professional Development Committee. She has served as NALA Affiliated Associations secretary and director, NALA treasurer, secretary, vice president, and president (2018-2020). She resides in Kenova, West Virginia, with her husband and son.



*Jean Gustafson*

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*Lawyer,  
Gustafson Law Office (MN)*

Jean graduated from the University of Minnesota Duluth in 1987 with a major in sociology and a minor in history. She attended the University of North Dakota School of Law and spent a semester studying law in Oslo, Norway. Jean started her career as a prosecutor but later transitioned into private practice with a concentration in family law. Jean practices all areas of family law. She enjoys researching law and will show paralegals unique ways of assisting attorneys and working with families of elderly people. She was awarded the 2017 Minnesota Lavender Bar Association Fellowship.



*Mary Katherine Mayer, ACP*

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*Paralegal, Yavapai County  
Public Defender's Office (AZ)*

Mary Katherine Mayer, ACP is an Advanced Certified Paralegal in Trial Practice and Criminal Litigation. Mary works for the Yavapai County Public Defender's Office in Northern Arizona. She is a member of NALA and the Arizona Paralegal Association, where she is the NALA liaison. Mary enjoys writing articles related to the paralegal field and helping paralegals obtain information to help with their professional and personal wellbeing. In her free time, Mary enjoys spending time with her husband and son, volunteering, and watching sports.





*Jeremy Holley*

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*Audit & Compliance Team Leader,  
Amrock (AL)*

Jeremy Holley has over 19 years of experience in the real estate industry. He has worked with two of Birmingham, Alabama’s largest law firms, specializing in commercial real estate and corporate divisions. Jeremy has been with Amrock for over 10 years and serves as leader of the Legal Department’s Audit and Compliance Team. He is a licensed residential title agent with Alabama. He has a degree in music education and studied social work and political science. He is a member and former regional director of the Alabama Association of Paralegals. Jeremy is the Southeast Land Title Association's president elect.



*Joseph Koenig*

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*Performance Auditor, South Carolina  
Legislative Audit Council (SC)*

Joseph Koenig is a retired special agent turned paralegal with four decades of experience in the criminal justice industry and extensive use-of-force training. He was a narcotics investigator, state trooper, SWAT member, patrol supervisor, and military policeman.



*Kelly A. LaGrave, ACP*

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*Paralegal,  
Honest Medical Group (TN)*

Kelly A. LaGrave, ACP, has been a paralegal since 1984 and currently works in the legal department at Honest Medical Group in Nashville, Tennessee. She specializes in the areas of business compliance, healthcare, and contracts. She has a Bachelor of Arts in international relations from James Madison College at Michigan State University and holds ACP credentials in Intellectual Property, Real Estate, and Contracts Administration/Contracts Management. She is a frequent speaker to paralegal groups across the country on topics such as business, contracts, ethics, legal essay writing, and certification. She has served NALA in many capacities, including as NALA President.



*Glenn A. Leier*

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*Founder & Administrator,  
AchieveVia (OR)*

Glenn A. Leier is the founder and administrator of AchieveVia, which provides review courses for the Certified Paralegal Exam. He is an attorney, paralegal educator, writer, and charity board member in Portland, Oregon. He has served as managing shareholder of a law firm, taught real estate law to paralegals, served as general counsel, and acted as trustee for revocable living trusts. He served for eight years on NALA's Certifying Board, presented at NALA's conferences, and wrote for *Facts & Findings*. He has a BA in journalism from the University of North Dakota and a JD from the University of Utah.



*Jen Lee*

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*Debt & Credit Strategy Attorney,  
Jen Lee Law (CA)*

Jen Lee is a bankruptcy attorney (or, as she likes to call it, a debt and credit strategy attorney) and is licensed in California and North Dakota. She often speaks at bar associations, professional groups, and other trade associations both on substantive issues for bankruptcy and debt and on law practice management.



*Amy McGuigan, CP, CEDS*

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*Senior Paralegal,  
Swanson & McNamara LLP (CA)*

Amy McGuigan, CP, CEDS, is a senior paralegal. She worked for the federal public defender in the Northern District of California for 15 years, where she assisted in several trials. Amy is a certified eDiscovery specialist, holding multiple ACEDS eDiscovery certifications, as well as certifications in Cellebrite Mobile Forensic Fundamentals and digital forensics. She has over 21 hours of digital forensic training in FTK. She is the Vice President of the San Francisco Paralegal Association, Chair of the Bar Association of San Francisco Paralegal Section, and Director of the San Francisco Chapter of Women in eDiscovery.



*Carl Morrison, ACP*

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*Chief of Staff,  
modCounsel (NV)*

Carl Morrison is an experienced ACP and award-winning Director of Legal Operations and has been in the legal industry for over two decades. He is a published author in legal professional magazines and a contributing author for *Advanced Manual for the Legal Professional*, 13th Edition. He is an active member of NALA, serving on the Certifying Board. He is also on the Corporate Legal Operations Consortium and IPMA. He serves on the ABA's Paralegal Education Approval Commission. Carl is passionate about educating and mentoring future paralegals and legal operations professionals.



*Mbilike Mwafulirwa*

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*Attorney,  
Brewster & De Angelis (OK)*

Mbilike (Bee-Lee-Kay) Mwafulirwa is an attorney whose practice focuses on complex civil litigation, civil rights, constitutional law, administrative law, appeals, and the emerging field of self-driving cars. He recently received a Martindale-Hubbell AV Preeminent Peer Review Rating, which signifies that a large number of his peers rank him at the highest level of professional excellence for his legal knowledge, communication skills, and ethical standards. He is the 2017 recipient of the Golden Quill Award: the Oklahoma Bar Association's highest intellectual award. Mbilike received his LLB from the University of Wales and his LLM and JD from the University of Tulsa.

# Exhibitors



**United Corporate Services, Inc.**



**National Association of Professional Process Servers**



**Cybertek Forensics Inc.**



**CobbleStone Software**



**CSC**



**Naegeli Deposition & Trial**



**Capitol Lien Records and Research, Inc.**



**Capitol Services**



**International Business Company Formation, Inc.**  
[www.ibcf.com](http://www.ibcf.com)

**International Business Company Formation, Inc.**



# Exhibitors Continued



Delaware Corporate  
Services, Inc.



Ontellus



WALZ Mail  
Automation



Divergent Language  
Solutions



Computershare



First Legal



Trustpoint.One



GoldFynch



The Colleges of Law

# Exhibitors Continued



Secured Signing



Legal Talk Network



SingleFile



Macro-Pro

# Event Descriptions

## Pre-conference Registration & Happy Hour

Are you ready to kick off the conference with a bang? Then join us for pre-conference registration on Tuesday, July 11th. Wait! It gets even better. Our Happy Hour welcome event is sponsored by none other than Wolters Kluwer and the San Francisco Paralegal Association. Get checked in early, start networking, and have some fun before the conference even begins. Do not miss out on this amazing opportunity to get a head start on networking. See you there!

## Opening Session & Keynote

Join us on Wednesday as we kick off another amazing event with a warm welcome and inspiring message from NALA President, Debbie Overstreet, ACP, which leads into our keynote session. NALA's keynote speaker this year is Dr. Catherine A. Sanderson! Many people focus on the importance of cognitive intelligence in predicting academic and professional success. But a growing amount of evidence suggests that other traits - including the ability to control impulses, manage adversity, find internal motivation, and build relationships - are essential in achieving the best outcomes in both personal and professional relationships. This keynote will therefore focus on the importance of so-called emotional intelligence (or EQ) in predicting success, and provide specific strategies for increasing your own EQ.

## Annual Membership Meeting & Awards

Join us for the 2023 NALA Annual Membership Meeting & Awards! We invite everyone to join NALA for this exciting event, where we will announce the results of the 2023 NALA Election, as well as honor the recipients of the various [NALA Awards](#). At this meeting, you will gain insights into NALA's operations, goals, programs, and services. We look forward to seeing you there! Meeting-only badges can be obtained at the Registration/Help Desk.

## NALA Leadership Panel

Have you been wanting to find out more about the [NALA Certified Paralegal Program](#), [NALA membership](#), and [volunteer opportunities](#)? We have got you covered! We are excited to announce our upcoming NALA Leadership Panel where we will be talking "anything NALA!" This is your chance to get your questions answered by a panel of experienced NALA leaders. Get the inside scoop on all the details you need to know about this incredible organization and what it can do for you! Do not miss out - be sure to grab a seat.

# Event Descriptions

## **Affiliated Associations Annual Meeting & Awards**

Attention members of NALA Affiliated Associations! Come join us at the 2023 Affiliated Associations Annual Meeting and Awards, where we will be announcing the 2023-2024 Affiliated Associations Director and Secretary. This meeting will also include the 2023 Affiliate Exchange, presented by the Houston Paralegal Association, and will culminate in the announcement of all 2023 award recipients. Do not miss out on this incredible opportunity to recognize your peers and engage in meaningful dialogue with other members of your Affiliated Association!

## **Affiliate Showcase & Opening Night Reception**

Ready to experience the best of the paralegal profession? The Affiliate Showcase and Reception at the NALA conference is your one-stop shop! Join us for a night full of fun activities and great swag, and get an opportunity to network with your fellow paralegals. Do not miss out on the chance to learn more about our NALA Affiliated Associations and the value they have to offer!

## **Installation of Officers Ceremony and Reception**

Join us as we welcome our newest NALA Board members! On July 13th, we will have the pleasure of honoring their leadership and service to our organization at the Installation of Officers ceremony and reception. We invite all conference attendees and their guests to join us in celebrating this special occasion. It is an honor to watch our elected members take the oath as they accept their new positions and begin their dedication to NALA.



# In-Person Schedule - Day 1

Wednesday, July 12, 2023

	6:45 AM - 6:15 PM	<b>Registration Open</b> America Ballroom Foyer, 4th Floor
	7:00 AM - 7:45 AM	<b>Final 2022 - 2023 Board of Directors Meeting</b> North Star Room, 7th Floor
	7:30 AM - 2:00 PM	<b>Expo Hall</b> Essex Ballroom, 3rd Floor
	7:30 AM - 9:00 AM	<b>Breakfast</b> Essex Ballroom, 3rd Floor
	9:00 AM - 11:00 AM	<b>Opening Session and Keynote</b> America Ballroom, 4th Floor
	11:00 AM - 11:30 AM	<b>Break/Expo Time</b> Essex Ballroom, 3rd Floor
	11:30 AM - 12:30 PM	<b>Ethical Considerations in Criminal Law Cases, Presenter: Amy McGuigan, CP, CEDS</b> 1 CLE Intermediate/Legal Ethics   America Ballroom, 4th Floor
		OR-
	11:30 AM - 12:30 PM	<b>CP Review - Legal Ethics, Presenter: Kelly LaGrave, ACP</b> 1 CLE Basic/Legal Ethics   Independence AB, 4th Floor
	12:30 PM - 1:00 PM	<b>Expo Time</b> Essex Ballroom, 3rd Floor
	1:00 PM - 2:30 PM	<b>Lunch and Annual Membership Meeting &amp; Awards</b> America Ballroom, 4th Floor
	2:30 PM - 3:00 PM	<b>Break</b> America Ballroom Foyer, 4th Floor
	3:00 PM - 4:30 PM	<b>NALA Leadership Panel</b> America Ballroom, 4th Floor
	4:30 PM - 5:00 PM	<b>Break</b> America Ballroom Foyer, 4th Floor
	5:00 PM - 6:30 PM	<b>Affiliated Associations Annual Meeting &amp; Awards</b> America Ballroom, 4th Floor
	6:30 PM - 7:00 PM	<b>Affiliate Showcase Setup (Setup Passes Required)</b> Staffordshire Ballroom, 3rd Floor
	7:00 PM - 8:30 PM	<b>Affiliate Showcase &amp; Reception</b> Staffordshire Ballroom, 3rd Floor

# In-Person Schedule - Day 2

Thursday, July 13, 2023

6:45 AM - 6:15 PM	<b>Registration Open</b> America Ballroom Foyer, 4th Floor	
7:30 AM - 2:00 PM	<b>Expo Hall</b> Essex Ballroom, 3rd Floor	
7:30 AM - 9:00 AM	<b>Breakfast</b> Essex Ballroom, 3rd Floor	
8:00 AM - 8:15 AM	<b>General Session - Highlights of the Day and Attendee Questions</b> America Ballroom South, 4th Floor	
 8:30 AM - 9:30 AM	<b>CP Review - Criminal Law and Procedure, Presenter: Mekka Crawford-Franklin</b> 1 CLE Basic/Substantive   Independence AB, 4th Floor	
9:00 AM - 10:30 AM	<b>CLE Sessions (Four Sessions throughout the 3rd and 4th Floors)</b>	
		<b>5th and 14th Amendments - John A. Bermingham, Jr. Esq.</b> 1.5 CLE Basic/Substantive   America Ballroom North
		<b>Defending Elder Law Fraud Claims - Jean Gustafson</b> 1.5 CLE Advanced/Substantive   America Ballroom Center
		<b>Text and Smartphone Evidence from ID to Production - Amy McGuigan, CP, CEDS</b> 1.5 CLE Intermediate/Substantive   St. George AB
		<b>Police Use of Force - Joseph Koenig</b> 1.5 CLE Advanced/Substantive   St. George CD
 10:00 AM - 11:00 AM	<b>CP Review - Contract Law - Mekka Crawford-Franklin</b> 1.5 CLE Intermediate/Substantive   Independence AB, 4th Floor	
10:30 AM - 11:30 AM	<b>Break</b> Essex Ballroom Foyer, 3rd Floor	10:30 AM - 11:00 AM Non CP Track 11:00 AM - 11:30 AM CP Track Break
11:00 AM - 12:30 PM	<b>CLE Sessions (Four Sessions throughout the 3rd and 4th Floors)</b>	
		<b>Roe v. Wade - John A. Bermingham, Jr. Esq.</b> 1.5 CLE Basic/Substantive   America Ballroom North
		<b>A Paralegal's Guide to Best Billing Practices - Kendal Cantrell, ACP</b> 1.5 CLE Basic/Non-Substantive   America Ballroom Center
		<b>Assisting at Trial - Amy McGuigan, CP, CEDS</b> 1.5 CLE Intermediate/Non-Substantive   St. George AB
		<b>Taming the Legal Spend Beast - Carl Morrison, ACP</b> 1.5 CLE Intermediate/Non-Substantive   St. George CD
 11:30 AM - 12:30 PM	<b>CP Review - Estate Planning and Probate, Presenter: Glenn A. Leier</b> Independence AB, 4th Floor	
12:30 PM - 2:30 PM	<b>Lunch on Your Own</b> More than 100 restaurants within walking distance	

(Continued on Next Page)

# In-Person Schedule - Day 2 Continued

Thursday, July 13, 2023

<b>LIVE</b>	2:30 PM - 3:30 PM	CP Review - Critical Thinking (Skills), Presenter: Glenn A. Leier Independence AB, 4th Floor
	2:30 PM - 4:00 PM	<b>CLE Sessions (Four Sessions throughout the 3rd and 4th Floors)</b>
<b>LIVE</b>		The Post Pandemic Real Estate Paralegal . . . Beginning Years - Jeremy Holley 1.5 CLE Basic/Substantive   America Ballroom North
<b>LIVE</b>		Smoke and Mirrors: Constitutional Ideals . . . - Mbilike Mwafulirwa 1.5 CLE Intermed./Substantive   America Ballroom Center
		Sibling Rivalry: . . . Troublemakers in the Family - Jean Gustafson 1.5 CLE Advanced/Substantive   St. George AB
		The A-Z's of Foreign Subpoenas - Kendal Cantrell, ACP 1.5 CLE Intermed./Substantive   St. George CD
	3:30 PM - 4:30 PM	<b>Break</b> America Ballroom Foyer, 4th Floor <span style="float: right;">3:30 PM - 4:00 PM CP Track Break 4:00 PM - 4:30 PM Non CP Track Break</span>
<b>LIVE</b>	4:00 PM - 5:30 PM	CP Review - Corporate and Commercial, Presenter: Kelly A. LaGrave, ACP Independence AB, 4th Floor
	4:30 PM - 6:00 PM	<b>CLE Sessions (Four Sessions throughout the 3rd and 4th Floors)</b>
<b>LIVE</b>		The Post Pandemic Real Estate Paralegal-The Seasoned One - Jeremy Holley 1.5 CLE Intermediate/Substantive   America Ballroom North
<b>LIVE</b>		Info. Governance, Data Privacy, and In-House Compliance - Carl Morrison, ACP 1.5 CLE Intermediate/Substantive   America Ballroom Center
		Rules of Evidence - Mary Mayer, ACP 1.5 CLE Basic/Substantive   St. George AB
		Correctional Use of Force in Prisons - Joseph Koenig 1.5 CLE Advanced/Substantive   St. George CD
	6:30 PM - 7:30 PM	<b>Reception and Installation of Board Members and Officers</b> Staffordshire Ballroom, 3rd Floor

# In-Person Schedule - Day 3

Friday, July 14, 2023

	6:45 AM - 7:45 PM	<b>Registration Open</b> America Ballroom Foyer	
	7:00 AM - 7:45 AM	<b>First 2023 - 2024 Board of Directors Meeting</b> North Star Room, 7th Floor	
	7:00 AM - 9:00 AM	<b>Breakfast</b> America Ballroom Foyer, 4th Floor	
	8:00 AM - 8:30 AM	<b>General Session - Highlights of the Day and Attendee Questions</b> America Ballroom South, 4th Floor	
	8:30 AM - 9:30 AM	<b>CP Review - US Legal System, Presenter: Mary Mayer, ACP</b> Independence AB, 4th Floor	
	9:00 AM - 10:30 AM	<b>CLE Sessions (Four Sessions throughout the 3rd and 4th Floors)</b>	
		<b>The A-Z's of Foreign Subpoenas - Kendal Cantrell, ACP</b> 1.5 CLE Intermediate/Substantive   America Ballroom North	
		<b>Sibling Rivalry: . . . Troublemakers in the Family - Jean Gustafson</b> 1.5 CLE Advanced/Substantive   America Ballroom Center	
		<b>The Post Pandemic Real Estate Paralegal-Your Beginning Years - Jeremy Holley</b> 1.5 CLE Basic/Substantive   St. George AB	
		<b>Smoke and Mirrors: Constitutional Ideals . . . - Mbilike Mwafulirwa</b> 1.5 CLE Intermediate/Substantive   St. George CD	
	10:00 AM - 11:00 AM	<b>CP Review - Civil Litigation, Presenter: Jill I. Francisco, ACP</b> Independence AB, 4th Floor	
	10:30 AM - 11:30 AM	<b>Break</b> America Ballroom Foyer, 4th Floor	10:30 AM - 11:00 AM Non CP Track 11:00 AM - 11:30 AM CP Track Break
	11:00 AM - 12:30 PM	<b>CLE Sessions (Four Sessions throughout the 3rd and 4th Floors)</b>	
		<b>Correctional Use of Force in Prisons - Joseph Koenig</b> 1.5 CLE Advanced/Substantive   America Ballroom North	
		<b>Advanced Chapter 13 Topics - Jen Lee</b> 1.5 CLE Advanced/Substantive   America Ballroom Center	
		<b>The Post Pandemic Real Estate Paralegal-The Seasoned One - Jeremy Holley</b> 1.5 CLE Intermediate/Substantive   St. George AB	
		<b>Smart Assistants and the Constitutional Expectations in the Smart Age - Mbilike Mwafulirwa</b> 1.5 CLE Intermediate/Substantive   St. George CD	
	11:30 AM - 12:30 PM	<b>CP Review - Torts, Presenter: Jill I. Francisco, ACP</b> Independence AB, 4th Floor	

(Continued on Next Page)



# In-Person Schedule - Day 3 Continued

Friday, July 14, 2023

12:30 PM - 2:30 PM	<b>Lunch on Your Own</b> More than 100 restaurants within walking distance
 2:30 PM - 3:30 PM	<b>CP Review Session - Real Estate and Property, Presenter: Glenn A. Leier</b> Independence AB, 4th Floor
2:30 PM - 4:00 PM	<b>CLE Sessions (Four Sessions throughout the 3rd and 4th Floors)</b>   <b>Text and Smartphone Evidence from ID to Production - Amy McGuigan, CP, CEDS</b> 1.5 CLE Intermediate/Substantive   America Ballroom North   <b>Rules of Evidence - Mary Mayer, ACP</b> 1.5 CLE Basic/Substantive   America Ballroom Center  <b>Info. Governance, Data Privacy, and In-House Compliance - Carl Morrison, ACP</b> 1.5 CLE Intermediate/Substantive   St. George AB  <b>Defending Elder Law Fraud Claims - Jean Gustafson</b> 1.5 CLE Advanced/Substantive   St. George CD
3:30 PM - 4:30 PM	<b>Break</b> America Ballroom Foyer, 4th Floor  3:30 PM - 4:00 PM CP Track Break 4:00 PM - 4:30 PM Non CP Track Break
 4:00 PM - 5:30 PM	<b>CP Review Session - Bankruptcy 101, Presenter: Jen Lee</b> Independence AB, 4th Floor
4:30 PM - 6:00 PM	<b>CLE Sessions (Four Sessions throughout the 3rd and 4th Floors)</b>   <b>Assisting at Trial - Amy McGuigan, CP, CEDS</b> 1.5 CLE Intermediate/Non-Substantive   America Ballroom North   <b>Police Use of Force - Joseph Koenig</b> 1.5 CLE Advanced/Substantive   America Ballroom Center  <b>Roe v. Wade - John A. Bermingham, Jr. Esq.</b> 1.5 CLE Basic/Substantive   St. George AB  <b>A Paralegal's Guide to Best Billing Practices - Kendal Cantrell, ACP</b> 1.5 CLE Basic/Non-Substantive   St. George CD
6:30 PM - 7:30 PM	<b>Closing Session</b> America Ballroom South, 4th Floor

# Prepping for the CP Exam

12 total  
CLEs

Wednesday, July 12, 2023

	6:45 AM - 6:15 PM	<b>Registration Open</b> America Ballroom Foyer, 4th Floor
	7:00 AM - 7:45 AM	<b>Final 2022 - 2023 Board of Directors Meeting</b> North Star Room, 7th Floor
	7:30 AM - 2:00 PM	<b>Expo Hall</b> Essex Ballroom, 3rd Floor
	7:30 AM - 9:00 AM	<b>Breakfast</b> Essex Ballroom, 3rd Floor
	9:00 AM - 11:00 AM	<b>Opening Session and Keynote</b> America Ballroom, 4th Floor
	11:00 AM - 11:30 AM	<b>Break/Expo Time</b> Essex Ballroom, 3rd Floor
	11:30 AM - 12:30 PM	<b>CP Review - Legal Ethics, Presenter: Kelly LaGrave, ACP</b> Independence AB
	12:30 PM - 1:00 PM	<b>Break/Expo Time</b> Essex Ballroom, 3rd Floor
	1:00 PM - 2:30 PM	<b>Lunch and Annual Membership Meeting &amp; Awards</b> America Ballroom, 4th Floor
	2:30 PM - 3:00 PM	<b>Break</b> America Ballroom Foyer, 4th Floor
	3:00 PM - 4:30 PM	<b>NALA Leadership Panel</b> America Ballroom, 4th Floor
	4:30 PM - 5:00 PM	<b>Break</b> America Ballroom Foyer, 4th Floor
	5:00 PM - 6:30 PM	<b>Affiliated Associations Annual Meeting &amp; Awards</b> America Ballroom, 4th Floor
	6:30 PM - 7:00 PM	<b>Affiliate Showcase Setup (Setup Passes Required)</b> Staffordshire Ballroom, 3rd Floor
	7:00 PM - 8:30 PM	<b>Affiliate Showcase &amp; Reception</b> Staffordshire Ballroom, 3rd Floor

# Prepping for the CP Exam

12 total  
CLEs

Thursday, July 13, 2023

6:45 AM - 6:15 PM

**Registration Open**  
America Ballroom Foyer, 4th Floor

7:30 AM - 2:00 PM

**Expo Hall**  
Essex Ballroom, 3rd Floor

7:30 AM - 9:00 AM

**Breakfast**  
Essex Ballroom, 3rd Floor

8:00 AM - 8:15 AM

**General Session - Highlights of the Day and Attendee Questions**  
America Ballroom, 4th Floor

LIVE

8:30 AM - 9:30 AM

**CP Review - Criminal Law and Procedure, Presenter: Mekka Crawford-Franklin**  
Independence AB, 4th Floor

LIVE

10:00 AM - 11:00 AM

**CP Review - Contract Law, Presenter: Mekka Crawford-Franklin**  
Independence AB, 4th Floor

11:00 AM - 11:30 AM

**CP Track Breaktime**  
Essex Ballroom Foyer, 3rd Floor

LIVE

11:30 AM - 12:30 PM

**CP Review - Estate Planning and Probate, Presenter: Glenn A. Leier**  
Independence AB, 4th Floor

12:30 PM - 2:30 PM

**Lunch on Your Own**  
More than 100 restaurants within walking distance

LIVE

2:30 PM - 3:30 PM

**CP Review - Critical Thinking (Skills), Presenter: Glenn A. Leier**  
Independence AB, 4th Floor

3:30 PM - 4:00 PM

**CP Track Breaktime**  
America Ballroom Foyer, 4th Floor

LIVE

4:00 PM - 5:30 PM

**CP Review - Corporate and Commercial, Presenter: Kelly A. LaGrave, ACP**  
Independence AB, 4th Floor

6:30 PM - 7:30 PM

**Reception and Installation of Board Members and Officers**  
Staffordshire Ballroom, 3rd Floor

# Prepping for the CP Exam

12 total  
CLEs

Friday, July 14, 2023

	6:45 AM - 7:45 PM	<b>Registration Open</b> Essex Ballroom Foyer
	7:00 AM - 7:45 AM	<b>First 2023 - 2024 Board of Directors Meeting</b> North Star Room, 7th Floor
	7:00 AM - 9:00 AM	<b>Breakfast</b> America Ballroom, 4th Floor
	8:00 AM - 8:30 AM	<b>General Session - Highlights of the Day and Attendee Questions</b> America Ballroom South, 4th Floor
	8:30 AM - 9:30 AM	<b>CP Review - US Legal System, Presenter: Mary Mayer, ACP</b> Independence AB, 4th Floor
	10:00 AM - 11:00 AM	<b>CP Review - Civil Litigation, Presenter: Jill I. Francisco, ACP</b> Independence AB, 4th Floor
	11:00 AM - 11:30 AM	<b>CP Track Breaktime</b> Essex Ballroom Foyer, 3rd Floor
	11:30 AM - 12:30 PM	<b>CP Review - Torts, Presenter: Jill I. Francisco, ACP</b> Independence AB, 4th Floor
	12:30 PM - 2:30 PM	<b>Lunch on Your Own</b> More than 100 restaurants within walking distance
	2:30 PM - 3:30 PM	<b>CP Review - Real Estate and Property, Presenter: Glenn A. Leier</b> Independence AB, 4th Floor
	3:30 PM - 4:00 PM	<b>CP Track Breaktime</b> America Ballroom Foyer, 4th Floor
	4:00 PM - 5:30 PM	<b>CP Review - Bankruptcy 101, Presenter: Jen Lee</b> Independence AB, 4th Floor
	6:30 PM - 7:30 PM	<b>Closing Session</b> America Ballroom South, 4th Floor

# Virtual Schedule - Day 1

Wednesday, July 12, 2023 

7:00 AM - 7:45 AM  
Eastern Time

Final 2022 - 2023 Board of Directors Meeting

9:00 AM - 11:00 AM  
Eastern Time

Opening Session and Keynote

11:30 AM - 12:30 PM  
Eastern Time

Ethical Considerations in Criminal Law Cases, Presenter: Amy McGuigan,CP, CEDS  
1 CLE Intermediate/Legal Ethics

OR-

11:30 AM - 12:30 PM  
Eastern Time

CP Review - Legal Ethics, Presenter: Kelly LaGrave, ACP  
1 CLE Basic/Legal Ethics

1:00 PM - 2:30 PM  
Eastern Time

Lunch and Annual Membership Meeting & Awards

3:00 PM - 4:30 PM  
Eastern Time

NALA Leadership Panel

5:00 PM - 6:30 PM  
Eastern Time

Affiliated Associations Annual Meeting & Awards



# Virtual Schedule - Day 2

Thursday, July 13, 2023 **LIVE**

8:30 AM - 9:30 AM  
Eastern Time

CP Review - Criminal Law and Procedure, Presenter: Mekka Crawford-Franklin

9:00 AM - 10:30 AM  
Eastern Time

**CLE Sessions - Choose One**

5th and 14th Amendments - John A. Bermingham, Jr. Esq.  
1.5 CLE Basic/Substantive

Defending Elder Law Fraud Claims - Jean Gustafson  
1.5 CLE Advanced/Substantive

10:00 AM - 11:00 AM  
Eastern Time

CP Review - Contract Law, Presenter: Mekka Crawford-Franklin

11:00 AM - 12:30 PM  
Eastern Time

**CLE Sessions - Choose One**

*Roe v. Wade* - John A. Bermingham, Jr. Esq.  
1.5 CLE Basic/Substantive

A Paralegal's Guide to Best Billing Practices - Kendal Cantrell, ACP  
1.5 CLE Basic/Non-Substantive

11:30 AM - 12:30 PM  
Eastern Time

CP Review - Estate Planning and Probate, Presenter: Glenn A. Leier

2:30 PM - 3:30 PM  
Eastern Time

CP Review - Critical Thinking (Skills), Glenn A. Leier

2:30 PM - 4:00 PM  
Eastern Time

**CLE Sessions - Choose One**

The Post Pandemic Real Estate Paralegal . . . Beginning Years - Jeremy Holley  
1.5 CLE Basic/Substantive

Smoke and Mirrors: Constitutional Ideals . . . - Mbilike Mwafulirwa  
1.5 CLE Intermediate/Substantive

4:00 PM - 5:30 PM  
Eastern Time

CP Review - Corporate and Commercial, Presenter: Kelly A. LaGrave, ACP

4:30 PM - 6:00 PM  
Eastern Time

**CLE Sessions - Choose One**

The Post Pandemic Real Estate Paralegal-The Seasoned One - Jeremy Holley  
1.5 CLE Intermediate/Substantive

Info. Governance, Data Privacy, and In-House Compliance - Carl Morrison, ACP  
1.5 CLE Intermediate/Substantive

# Virtual Schedule - Day 3

Friday, July 14, 2023 

7:00 AM - 7:45 AM  
Eastern Time

First 2023 - 2024 Board of Directors Meeting

8:30 AM - 9:30 AM  
Eastern Time

CP Review - US Legal System, Presenter: Mary Mayer, ACP

9:00 AM - 10:30 PM  
Eastern Time

**CLE Sessions - Choose One**

The A-Z's of Foreign Subpoenas - Kendal Cantrell, ACP  
1.5 CLE Intermediate/Substantive

Sibling Rivalry: . . . Troublemakers in the Family - Jean Gustafson  
1.5 CLE Advanced/Substantive

10:00 AM - 11:00 AM  
Eastern Time

CP Review - Civil Litigation, Presenter: Jill I. Francisco, ACP

11:00 AM - 12:30 PM  
Eastern Time

**CLE Sessions - Choose One**

Correctional Use of Force in Prisons - Joseph Koenig  
1.5 CLE Advanced/Substantive

Advanced Chapter 13 Topics - Jen Lee  
1.5 CLE Advanced/Substantive

11:30 AM - 12:30 PM  
Eastern Time

CP Review - Torts, Presenter: Jill I. Francisco, ACP

2:30 PM - 3:30 PM  
Eastern Time

CP Review - Real Estate and Property, Presenter: Glenn A. Leier

2:30 PM - 4:00 PM  
Eastern Time

**CLE Sessions - Choose One**

Text and Smartphone Evidence from ID to Production - Amy McGuigan, CP, CEDS  
1.5 CLE Intermediate/Substantive

Rules of Evidence - Mary Mayer, ACP  
1.5 CLE Basic/Substantive

4:00 PM - 5:00 PM  
Eastern Time

CP Review - Bankruptcy 101, Presenter: Jen Lee

4:30 PM - 6:00 PM  
Eastern Time

**CLE Sessions - Choose One**

Assisting at Trial - Amy McGuigan, CP, CEDS  
1.5 CLE Intermediate/Non-Substantive

Police Use of Force - Joseph Koenig  
1.5 CLE Advanced/Substantive

# Conference Sessions

## *5th and 14th Amendments*

John A. Bermingham, Jr., Esq.

CLE 1.5 • Substantive • Basic

**Description:** This session will discuss the meanings of the 5th and 14th Amendments. Specific attention will be paid to the Due Process Clause of both amendments, while analyzing historic Supreme Court cases decided under the 5th and 14th Amendments and the individual sections of both amendments.

## *Advanced Chapter 13 Topics*

Jen Lee

CLE 1.5 • Substantive • Advanced

**Description:** This session is designed as an advanced dive into Chapter 13 practice. An overview of Chapter 13 is provided to understand the types of debts and assets commonly dealt with in Chapter 13. Then we dig into how Chapter 13 plans are crafted, what types of provisions can be included, and how payments are calculated. Once the plan is filed, all kinds of motions and objections can be filed. Understanding how Chapter 13 winds its way through the court system helps to spot issues and draft pleadings often needed in complicated reorganization cases.

## *A Paralegal's Guide to Best Billing Practices*

Kendal Cantrell, ACP

CLE 1.5 • Non-substantive • Basic

**Description:** How do you get paid while maximizing profitability and keeping the client happy? Proper and ethical billing techniques are vital to the success of any law firm and do not have to be as daunting as they may seem. Let us face it – time is money! This course will teach you the ethics of legal billing, the importance of timely billing and invoicing, and best billing practices and strategies for becoming a savvy timekeeper.

## *Assisting at Trial*

Amy McGuigan, CP, CEDS

CLE 1.5 • Non-substantive • Intermediate

**Description:** This course will help you set yourself up for a seamless trial from the beginning, including how to prepare for trial and assist in one at the counsel table.

### *Correctional Use of Force in Prisons*

Joseph Koenig

CLE 1.5 • Substantive • Advanced

**Description:** This session will explore Eighth Amendment standards governing correctional uses of force as interpreted by the court in *Whitley v. Albers* (1986) and *Hudson v. McMillian* (1992), as well as the concept of deliberate indifference and federal statutes that prohibit unnecessary or excessive uses of force. Upon completion, attendees should have a working knowledge of differences in assessing law enforcement uses of force and correctional uses of force, the Eighth Amendment's cruel and unusual standard, elements considered by the court in assessing a correctional use of force, the concept of deliberate indifference applied to correctional uses of force, and elements of an excessive force action under 42 U.S.C. § 1983.

### *CP Review - Civil Litigation*

Jill I. Francisco, ACP

CLE 1 • Substantive • Basic

**Description:** This session assists those preparing for the Certified Paralegal Exam review for the civil litigation portion of the Knowledge Exam. The session offers a broad and basic view of the fundamentals of civil litigation. It will include discussions in the following areas: (1) jurisdiction (2) the federal rules of civil procedure (3) pleadings (4) discovery (5) motion practice (6) trial process and (7) appeal process.

### *CP Review - Bankruptcy 101*

Jen Lee

CLE 1.5 • Substantive • Basic

**Description:** This session is designed for professionals who want to better understand bankruptcy and the bankruptcy process. An overview is provided of the most recent update to bankruptcy law, the types of debt handled in different kinds of bankruptcies, and the differences between Chapter 7 and Chapter 13 for individual and sole proprietor debtors. We will review the intake process and the required disclosures as a debt relief agency under the bankruptcy code. In addition, we will review the types of documents to be collected, signing and filing a bankruptcy case, and what happens after filing for both chapters of bankruptcy. A brief discussion at the end will review the discharge and automatic stay issues that come up when handling bankruptcy cases and bankruptcy litigation.

### *CP Review - Contract Law*

Mekka Crawford-Franklin  
CLE 1 • Substantive • Basic

**Description:** This course is designed to examine contract basics by explaining what a contract is and the various contract types. Key elements to most contracts are covered, along with an explanation of how US law governs contractual activity, including enforcement and dispute resolution options and the three requirements of a contract (offer, consideration, and acceptance). The course also examines who can enter a contract, how to approach negotiation, designing a written contract, unfair and improper contracts, contract termination, breach, voiding and rescission claims, and details on special contract situations, including real estate, financing, social contracts, and internet use.

### *CP Review - Criminal Law and Procedure*

Mekka Crawford-Franklin  
CLE 1 • Substantive • Basic

**Description:** This course is an introduction to substantive and criminal law that includes criminal statutes, search and seizure, arrest, confessions, citizens' rights, court functions, admissible evidence, and investigative techniques. Emphasis is placed on the practical uses in assisting defense attorneys, including procedural issues for arrest warrants, probable cause hearings, grand juries, and trial issues.

### *CP Review - Corporate and Commercial*

Kelly A. LaGrave, ACP  
CLE 1.5 • Substantive • Basic

**Description:** This session assists those preparing for the Certified Paralegal Exam, focusing on review for the corporate/commercial law portion of the Knowledge Exam. The session offers a broad and basic view of the fundamentals of corporate and commercial law and will include discussions in the following areas: (1) Basic concepts of various types of business entities, including formation, issues of capitalization, management, ownership, public vs. private, and tax implications; (2) Fiduciary duty, duty of care, duty of loyalty, and the business judgment rule; (3) Mergers, acquisitions, joint ventures, consolidation, and dissolution; and (4) Anti-trust issues.



### *CP Review - Critical Thinking (Skills)*

Glenn A. Leier

CLE 1 • Substantive • Basic

**Description:** This session is a review of a legal memorandum for the CP Skills Exam, the second exam required for obtaining paralegal certification from NALA. Although a keyword list and more than 30 sample multiple-choice questions will be provided, they will not be the focus of the session. The discussion will touch on the importance of proper grammar and clear writing, as well as the need to practice writing memoranda to prepare for the Skills Exam. This course introduces the required format of a memorandum to pass the CP Skills Exam and a step-by-step approach to writing the memorandum. The session will focus on facts, issues, discussion/analysis, and conclusions. The presentation will discuss a facts scenario, hypothetical statutes for writing the memorandum, and a sample memorandum based on the scenario. The sample memorandum will be dissected showing the different parts and format of the memorandum.

### *CP Review - Estate Planning and Probate*

Glenn A. Leier

CLE 1 • Substantive • Basic

**Description:** This session is a review of the estate planning and probate section of the CP Knowledge Exam. The course will focus on keywords and an outline of this area of law. Bonus materials will include more than 30 sample multiple-choice questions and answer explanations. This course is structured and organized to provide a guide for studying for the CP Knowledge Exam, including keywords, outline, and sample questions. The session will introduce the main estate planning tools such as wills, trusts, powers of attorney, advance directives, and non-probate transfers and the basic requirements of each. Probate administration will be discussed for testate succession and intestate succession.

### *CP Review - Legal Ethics*

Kelly A. LaGrave, ACP

CLE 1 • Legal Ethics • Basic

**Description:** This session will assist those preparing for the Certified Paralegal Exam, focusing on review for the ethics portion of the Knowledge Exam. The session will focus on the following: (1) ethical responsibilities centering on performance of delegated work (2) paralegal professional responsibility (3) professional relationships (4) client and public contracts and (5) attorney code of ethics and discipline.

### *CP Review - Real Estate and Property*

Glenn A. Leier

CLE 1 • Substantive • Basic

**Description:** This session is a review of the real estate and property section of the CP Knowledge Exam. The presentation will be an outline focusing on the keywords in this area of law. Participants will also receive more than 30 sample multiple-choice questions and answer explanations. This course introduces a structure to organize participants' study structure for the CP Knowledge Exam, starting with keywords, supplementing with an outline, and then studying multiple-choice questions. The review course will include a discussion of types of ownership and leases that evolved to present-day real estate interests. The discussion includes the main types of property (real property, personal property, and fixtures) and why the law distinguishes the different types of property. The course introduces offers to buy real estate, financing, surveys, legal descriptions, easements, public and private controls on real estate, deeds, residential and commercial leases, and types of lawsuits involving real estate.

### *CP Review - Torts*

Jill I. Francisco, ACP

CLE 1 • Substantive • Basic

**Description:** This session assists those preparing for the Certified Paralegal Exam to review for the torts portion of the Knowledge Exam. Learning objectives include the following: (1) knowing the definition of a tort, including the difference between a tort and a criminal act (2) understanding how and where different types of cases are filed and tried (3) understanding intentional torts, negligence, and strict liability (4) studying the Federal Torts Claim Act, and (5) understanding how common law and state statutory law define the boundaries of tort law.

### *CP Review - US Legal System*

Mary Katherine Mayer, ACP

CLE 1 • Substantive • Basic

**Description:** This session will provide a better understanding of the origins of the U.S. legal system and what is contained within the legal system in hopes that students will pass the CP Exam.

### *Defending Elder Law Fraud Claims*

Jean Gustafson

CLE 1.5 • Substantive • Advanced

**Description:** Participants will learn how to better assist attorneys during complicated appeals of allegations in criminal law, elder law, fraud, misrepresentation, and elder abuse.

### *Ethical Considerations in Criminal Law Cases*

Amy McGuigan, CP, CEDS

CLE 1 • Legal Ethics • Intermediate

**Description:** This session will cover best practices for avoiding ethical violations and UPL and protecting yourself (and your attorney) from violations of the protective order.

### *Information Governance, Data Privacy, and In-House Compliance*

Carl Morrison, ACP

CLE 1.5 • Substantive • Intermediate

**Description:** One of these things is not like the other – or is it? In-house legal operations professionals and paralegals understand that more and more data is created and maintained every day. How do you manage the ever-growing mound of data? What happens when that data contains personal and confidential information for your customers, your employees, and your business clients? What laws and regulatory bodies govern this data, and how do you protect it? In this session, Carl will help you understand the challenges around maintaining this Gordian Knot of data, creating a successful information governance program, and understanding what laws can affect that data.

### *Police Use of Force*

Joseph Koenig

CLE 1.5 • Substantive • Advanced

**Description:** This session will explore Fourth Amendment standards governing police uses of force as interpreted by the court in *Tennessee v. Garner* (1985) and *Graham v. Connor* (1989) and federal statutes that prohibit the unnecessary or excessive use of force. Upon completion, attendees should have a working knowledge of the objective reasonableness standard in assessing police uses of force, lethal force used to prevent the escape of a fleeing suspect, elements of an excessive force action under 42 U.S.C. § 1983, the concept of under color of law in excessive force prosecution, and the concept of qualified immunity in excessive force defense.

### *Roe v. Wade*

John A. Bermingham, Jr., Esq.

CLE 1.5 • Substantive • Basic

**Description:** This session will discuss the evolution of the right to privacy and how the Constitution inferred that the right to privacy is a fundamental right. Additionally, the attendees will be introduced to the Supreme Court cases that led to the *Roe v. Wade* decision and how the right to privacy played a key role in the Supreme Court's ruling. Furthermore, attendees will understand how *Roe v. Wade* became the groundwork for other privacy rights that were constitutionally protected. An analysis will be done on what eventually led to the *Dobbs v. Jackson Women's Health Organization* case and why the Supreme Court overturned *Roe v. Wade*. Lastly, the discussion will revolve around recognizing where the future is headed and what states are doing now that *Roe v. Wade* is no longer law.

### *Rules of Evidence*

Mary Katherine Mayer, ACP  
CLE 1.5 • Substantive • Basic

**Description:** There will be a discussion about the Federal Rules of Evidence, when they started, why, and when they were updated. Another discussion will focus on hearsay, authentication, and relevance. Participants should come away with a grasp of the way in which evidence is introduced, reasons for many evidentiary limitations, and how the evidentiary rules are applied. They will be more effective in helping prepare for litigation and have a better understanding of what information can make it to the jury.

### *Sibling Rivalry: How to Successfully Manage a Case Against Troublemakers in the Family*

Jean Gustafson  
CLE 1.5 • Substantive • Advanced

**Description:** Attendees will learn the motives behind family members suing each other and how to successfully bring and defend a guardianship or trustee action for the client's best outcome.

### *Smart Assistants and the Constitutional Expectations in the Smart Age*

Mbilike Mwafulirwa  
CLE 1.5 • Substantive • Intermediate

**Description:** Every day, smart assistants like Siri and Alexa respond to routine requests. They call Uber, order pizza, and so on. What about this request: "Alexa, who killed John?" Is that request going too far? No, actually. That very question was the subject of a murder prosecution in Arkansas. A victim died in a home that had Alexa operational. The police suggested that, while recording its user's voice commands, Alexa also captured other background sounds—possibly the critical moments of a crime. The police demanded the user's Alexa data from Amazon. In another case, the FBI wanted to access a user's iPhone, so it asked a court to force Apple to create software to break into the iPhone. Considered together, those two cases compel us to consider and answer two questions. Can the government compel disclosure of a user's data in their smart devices? If so, under what circumstances?

### *Smoke and Mirrors: Constitutional Ideals When Fact and Fiction Can't Be Separated*

Mbilike Mwafulirwa

CLE 1.5 • Substantive • Intermediate

**Description:** You have heard a thing or two about fake news, but have you heard about deepfakes? Deepfakes are fake video and audio, mostly posted and shared online, that make any person appear to do or say something they did not. A major premise of our concept of truth depends on believing and accepting what we see or hear. So profound is that premise that our entire justice system desperately depends on it. In litigation, whether civil or criminal, audio and video evidence is now standard. Thus, the questions this course explores are what do we do as a people, as a society, and as key participants in the legal system if we can no longer believe and trust what we see or hear? What legal tools are there to deal with deepfakes?

### *Taming the Legal Spend Beast: Outside Counsel Management Through Effective & Efficient Methods*

Carl Morrison, ACP

CLE 1.5 • Non-substantive • Intermediate

**Description:** How do legal operations leaders balance the demands of corporate finance when our background consists primarily of law firm experience? In-house legal operations leaders rely on data and efficiency when making outside counsel decisions, but that does not mean the cost is becoming less important. In this session, Carl Morrison will discuss the most common hurdles to effective outside counsel management from both sides of the legal coin (in-house and law firm) and how best to determine whether to stay in-house or use external support. Now more than ever, legal operations has a crucial role in outside counsel management and adds strategic value. Let us explore measuring performance, outcomes, and return on investment against legal spending and matter management.

### *Text and Smartphone Evidence from Identification to Production*

Amy McGuigan, CP, CEDS

CLE 1.5 • Substantive • Intermediate

**Description:** This course will cover how to collect text messages and other information from a cell phone, when you should do it yourself, and when an expert needs to be called in.



### *The A-Z's of Foreign Subpoenas*

Kendal Cantrell, ACP

CLE 1.5 • Substantive • Intermediate

**Description:** Almost all litigation will involve the issuance of a subpoena at some point in time. Quite often, the need arises to issue a subpoena in another state.

Understanding the ins and outs of the foreign subpoena process is critical to achieving success in getting the subpoenas issued, served, and ultimately complied with by the responding party. This course will help you become more confident in your foreign subpoena skills and set you up for becoming the go-to source in your firm for issuing out-of-state subpoenas.

### *The Post Pandemic Real Estate Paralegal - The Seasoned One*

Jeremy Holley

CLE 1.5 • Substantive • Intermediate

**Description:** The intermediate post-pandemic real estate paralegal will receive an in-depth explanation of some of the most standard title industry matters.

### *The Post Pandemic Real Estate Paralegal - Your Beginning Years*

Jeremy Holley

CLE 1.5 • Substantive • Basic

**Description:** The beginner post-pandemic real estate paralegal will receive an overall explanation of many standard title industry topics and commonly used terms for billable hours.

# Conference FAQs

We are happy to answer any questions you have about the 2023 NALA Conference & Expo. For your convenience, we have listed some frequently asked questions below. For a full list of conference FAQs, visit our [website](#).

## Top 5 Conference FAQs

**Where do I go to pick up my name badge?**

The Registration/Help Desk will have everything you need to enjoy the conference. Just give us your full name, and leave the rest to us.

**What are some networking opportunities?**

Some of the greatest benefits of attending the conference in person are the vast opportunities to network with your paralegal peers. You will want to be sure to attend all of the NALA events and receptions and bring your business cards. There will also be a conference attendee Facebook group for both in-person and virtual attendees.

**Where do I go if I have questions?**

The NALA staff located at the Registration/Help Desk can help answer any questions you may have.

**How many CLE can I earn?**

There will be an opportunity to earn up to 13 CLE during the live conference.

**When will the conference recording bundle be available for purchase?**

It is currently available for purchase, but it will not be accessible until September or October.



# 2024 NALA Conference & Expo

July 11-13, 2024  
Louisville Marriott Downtown,  
Louisville, KY

*SAVE THE DATE*

2023 NALA CONFERENCE & EXPO

[nala.org](http://nala.org)

# EVENT PLATFORM

Enhance your NALA Conference experience with the app and event platform.

***You can make your conference game plan on the go and update it as needed. It is a tool designed to simplify and improve your conference experience. It keeps everyone connected, no matter how you choose to attend.***

The NALA 2023 Conference & Expo's app and online event platform will elevate your experience. You can access it from your mobile device or computer, but for in-person attendees a mobile device is recommended for ease of access throughout the conference.

Before the conference, you can use the app and platform to explore sessions, set your schedule, view the lineup of exhibitors, and message fellow attendees.

During the conference, you will be able to make appointments to chat with other attendees, exhibitors, and NALA staff. You can access handouts from all of our educational sessions, take interactive polls, and respond to survey questions about your session experiences.

The app and platform will allow you to see which sessions are available, when, and where. It will give you information about the speakers, exhibitors, and sponsors. With the included map of the Westin Copley Place, Boston, you will know exactly where to go and how to get there.



2023 NALA CONFERENCE & EXPO

[nala.org](http://nala.org)



# Contact Us & Resources

## Contact NALA

Phone: 918.587.6828

Fax: 918.582.6772

Email: [nalanet@nala.org](mailto:nalanet@nala.org)

In-person: 6450 S. Lewis Avenue, Suite 250, Tulsa, OK 74136

## Ready to Register?

You can register for the 2023 NALA Conference & Expo by clicking [here](#) and selecting virtual, in-person, or single day pass.

If you need additional assistance, you can call NALA. We are happy to help. If you are an active type member and would like to use your \$80 education voucher toward registration, give us a call.

## Be a NALA Sponsor

If you are interested in advertising with NALA or becoming a sponsor or exhibitor at the 2023 NALA Conference & Expo, check out our [2023 Media Kit](#).

## Still Have Questions?

For a full list of FAQs, visit our [website](#).







## CANCELTATION POLICY

**IN-PERSON ATTENDEES**, including single day pass holders, who cancel their registration by June 23, 2023, will receive a 100% refund. Cancellations made after June 23rd will be charged a \$100 processing fee. There will be no refunds after July 7th.

**VIRTUAL ATTENDEES** who cancel seven or more days prior to conference (by July 5, 2023) will receive a 100% refund. There will be no virtual refunds after July 5th.

## COVID-19 POLICY AGREEMENT

- By registering for this event, I am acknowledging that I have read and agree to *NALA'S COVID-19 Safety & Conference Policies*, as outlined at [www.nala.org](http://www.nala.org).

## BILLING & PAYMENT INFORMATION

Check enclosed for \$\_\_\_\_\_ (Make checks payable to NALA)

- I authorize NALA to charge \$\_\_\_\_\_ to my

VISA  Mastercard  American Express  Discover

Credit Card # \_\_\_\_\_

Expiration Date \_\_\_\_\_

Billing Address \_\_\_\_\_

Name as it appears on card \_\_\_\_\_

Signature \_\_\_\_\_

Contributions or gifts to NALA-The Paralegal Association are not deductible as charitable contributions for federal income tax purposes; however, payments may qualify as ordinary and necessary business expenses. By registering for the 2023 NALA Conference & Expo, you grant NALA-The Paralegal Association permission to take, use, reuse, and publish photographs and/or videos of attendees in any and all of its publications and in any and all other media, including but not limited to use and publication on the internet, webpages, magazines, and social media accounts. By registering for conference, your information may be shared with conference Active type member and partners. \*DISCLAIMER: Your interactions with vendors associated with the NALA Expo Hall, including payment and delivery of goods or services, and any other terms, conditions, warranties, or representations associated with such dealings, are solely between you and such organizations and/or individuals. You should conduct whatever research you feel necessary or appropriate before proceeding with any online or offline transactions with any of these third parties. By registering for conference, you agree that NALA-The Paralegal Association is not responsible or liable for any loss or damage of any sort incurred as the result of any such dealings. If there is a dispute between you and a exhibitor, you understand and agree that NALA-The Paralegal Association is under no obligation to become involved. In the event of dispute, you hereby release NALA-The Paralegal Association and its officers and employees in rights from claims, demands, and damages (actual and consequential) of every kind of nature, known or unknown, suspected or unsuspected, disclosed and undisclosed, from any such disputes.

Return this form with payment to NALA 6450 S Lewis Ave, Suite 250, Tulsa, OK 74136.  
Fax this form with payment to 918-582-6772, or register online at [www.nala.org](http://www.nala.org).

# COVID-19 SAFETY POLICY

In light of the COVID-19 pandemic, NALA is committed to keeping our conference guests healthy and safe. We remain up to date on the guidelines and mandates that are designed with safety in mind. While we do not currently require masks or social distancing, we do encourage them. For more information about our COVID-19 Safety & Conference Policies and what the Westin Copley Place, Boston is doing to keep its guests safe, visit [nala.org](http://nala.org).



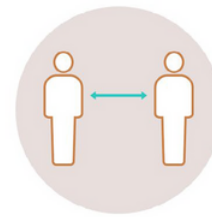
**Wear a Mask**



**Wash Your Hands**



**Use Hand Sanitizer**



**Social Distance**

May 31, 2023 V.10

2023 NALA CONFERENCE & EXPO

[nala.org](http://nala.org)