

Event Title:

Difficult Client Scenarios: An Ethical Guide for Paralegals

Event Date and Time:

April 23, 2024 -- 03:00 PM EDT - 05:15 PM EDT

Event Agenda:

All times are shown in Eastern time.

I. What Can You Do? When Clients...

3:00 - 3:30, Peter L. Ostermiller

- A. Ask You for Legal Advice (UPL)
- B. Conceal Facts, Lie, or Make Questionable Representations
- C. Ask You to Do Something Illegal, Unethical, or Inappropriate
- D. Conflicting Duties: Reporting Wrongdoing vs. Preserving Confidentiality

II. Dealing With Common Client Problems

3:30 - 4:00, Peter L. Ostermiller

- A. Applicable Guidance and Relevant Rules
- B. Clients Who Expect a Response at 2:00 a.m.
- C. Clients With Unreasonable Expectations
- D. Clients Who Think They Know It All
- E. Clients Who Don't Communicate
- F. Bearing Bad News With Professionalism and Poise

III. Working With Clients Who Have Disabilities or Cultural Differences

4:15 - 4:45, Jan I. Berlage

IV. Avoiding Billing Disputes: Top 10 Tips for Paralegals

4:45 - 5:15, Jan I. Berlage

Event Description:

Never give legal advice, keep clients reasonably informed - you know the rules. But in the real world, things are rarely straightforward. In this program, knowledgeable faculty will reveal solutions to the ethical dilemmas you face every day. From handling unreasonable client requests to delivering bad news, get the guidance you need to avoid ethics pitfalls while also maintaining a high standard of client service. Register today!

- Discover how to respond to client inquiries without falling into the legal advice trap.
- Learn how to tactfully get honest answers out of the lying client.
- Ensure proper communications with clients, whether they're difficult to contact or calling multiple times a day.
- Uncover 10 simple yet effective tips for preventing billing disputes.

Who Should Attend:

This **intermediate level course** is designed to give paralegals the knowledge they need to ethically handle difficult clients and uncomfortable scenarios. Those who should attend include:

- Paralegals
- Legal Technicians
- Legal Assistants
- Legal Support Staff

Event Bio:

Jan I. Berlage is a partner with Gohn Hankey & Berlage LLP. His practice focuses on general business litigation, ranging from commercial disputes to bankruptcy to intellectual property. Mr. Berlage has extensive experience in trials, arbitrations, mediations, and administrative hearings, including arguments before the Maryland Court of Appeals and the U.S. Court of Appeals for the Third and Fourth circuits. He has secured major jury verdicts and large settlements for both businesses and individuals, as well as successfully defended against multi-million dollar claims in both state and federal court. Prior to private practice, Mr. Berlage served as law clerk to the Honorable E. Stephen Derby, U.S. Bankruptcy Court for the District of Maryland. He has taught pretrial litigation practice at the University of Maryland School of Law, and served on the Board of Governors for the Maryland State Bar Association and the U.S. Commission on Civil Rights, Maryland State Action Committee. Mr. Berlage is a fellow of both the American and Maryland State bar associations, presents regularly at CLE courses, and has been the chair of numerous committees at both the national and state level. He earned his B.A. degree, with honors, from Wesleyan University; his J.D. degree from the University of Virginia School of Law, where he served as executive editor of *The Journal of Law & Politics*; and is a member of Phi Beta Kappa.

Peter L. Ostermiller is a sole practitioner concentrating in legal ethics and professional responsibility matters. He represents attorneys in disciplinary and reinstatement proceedings, judges in judicial ethics matters, and bar exam applicants. Mr. Ostermiller has also represented parties in attorney's fee dispute proceedings, and attorneys in legal proceedings in which sanctions have been sought against the attorney; represented parties in attorney disqualification proceedings; and counseled lawyers and law firms in their respective rights, responsibilities and duties to other attorneys and their clients. He is a member of the Kentucky Bar Association, Louisville Bar Association and the Association of Professional Responsibility Lawyers. Mr. Ostermiller served on the Kentucky Bar Association's Ethics 2000 Committee, which proposed changes to the Rules of Professional Conduct to the KBA, and resulted in the July 2009 revisions to the ethics rules. He earned his B.A. and J.D. degrees from the University of Louisville.