

Event Title:

A Paralegal's Guide to the Ultimate Trial Notebook

Event Date and Time:

May 30, 2024 -- 03:00 PM EDT - 06:15 PM EDT

Event Agenda:

All times are shown in Eastern time.

I. Early Preparation Strategies

3:00 - 3:45, Lisa Szyg

- A. Starting Point - Trial Order/Court Scheduling Order
- B. Ideal Timeline for Trial Notebook Prep
- C. Strategic Structure: Litigation vs. Chronological
- D. What Essential Elements to Include - Working With Your Trial Counsel
- E. Collecting Vital Case-Related Materials
- F. Using the Notebook as a Trial Preparation Tool
- G. Other Critical Items - Office Supplies, Contact Lists, Redundant Paper and Electronic Copies

II. Checklists and Organization Techniques

3:45 - 4:30, Lisa Szyg

- A. Checklist: What is Needed for a Comprehensive Trial Notebook (and Materials That Should be Left Out)
- B. Critical Sections and Their Development
- C. Organization Pointers
- D. Cross-Referencing for Seamless Navigation
- E. Common Pitfalls in Trial Notebook Organization

III. Mastering Electronic Trial Notebooks

4:45 - 5:30, Michelle Arty

- A. Comparing Software Options: Cost, Security, Features, and Functionality
- B. Building and Managing Electronic Trial Notebooks
- C. Streamlining Organization
- D. Using Tags, Bookmarks, and Indexes for Quick Reference and Navigation
- E. Collaborating and Coordinating Use With the Rest of the Litigation Team and the Court

IV. Maximizing Trial Notebook Utility in the Courtroom

5:30 - 6:15, Michelle Arty

- A. Leveraging Trial Notebooks for Effective Presentation and Navigation During Courtroom Proceedings
- B. Anticipating Unexpected Challenges in the Courtroom - Managing Trial Logistics
- C. Troubleshooting in Real-Time
- D. Updating and Maintaining the Trial Notebook Throughout the Trial Process

Event Description:

A poorly put together trial notebook can leave your attorney desperately fumbling for

information, documents, and evidence in the heat of trial. A truly outstanding one will leave them looking quick on their feet, confident, and competent. This guide will show how to create a notebook that is not just good but exceptional. Learn the keys to fashioning a trial notebook that will enhance - not hamper - your attorney's courtroom impact. Register today!

- Discover the most effective ways to structure and organize trial notebooks.
- Blend best practices with your attorney's individual style and needs.
- Minimize clutter while ensuring nothing vital is left out of the trial notebook.
- Learn how to make the most of electronic trial notebooks.
- Find out how to maintain the trial notebook throughout the trial process.

This program was designed in conjunction with NBI's esteemed 2023-2024 Content Advisory Committee Member James Susag.

**Any mention of specific products in this program is intended as part of a general overview and does not constitute IPE's endorsement or recommendation of any specific product or provider. This program is not sponsored by any technology or electronics provider.*

Who Should Attend:

This **intermediate level course** is designed to teach attendees how to prepare an effective trial notebook. Those who should attend include:

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

Event Bio:

[**Michelle Arty**](#) is a litigation paralegal with Shendell & Pollock, PL in Boca Raton, Florida. She is involved in all aspects of trial and appellate work, including client and witness interviews; communicating with clients/parties, opposing counsel and staff, and outside professionals and organizations; discovery, both review and analysis of incoming and outgoing discovery requests and working with clients to compile and draft responses to same; scheduling; attendance at mediations, hearings and trials; legal research; drafting pleadings from initial filing through appeal; and maintaining files. Ms. Arty is a certified paralegal, having received her advanced certifications in both trial practice and e-discovery. She is also a Florida registered paralegal. Ms. Arty is currently serving her second term on The Florida Bar's FRP Enrichment Committee. She is a member of the Paralegal Association of Florida and is serving as president of its Palm Beach Chapter. She received her A.A.S. degree in legal assisting from Tallahassee Community College and her A.A. degree from Florida State University.

[**Lisa Szyk**](#) is an attorney at Backus Burden, where she has dedicated her career to assisting criminal defendants in their legal defense. Ms. Szyk has practiced in family law, including assisting families with child custody, child support and divorce matters. She has also focuses part of her time to veterans, assisting local veterans with a myriad of legal

needs including Veteran's Affairs claims. Ms. Szyc is licensed to practice in the Ninth Circuit Court of Appeals. She earned her B.A. degree from University of Nevada at Las Vegas and her J.D. degree from North Carolina Central University School of Law.