



# THE PARALEGAL RESOURCE

The Official Publication of the Cincinnati Paralegal Association

## Cultivating Excellence Through Collaboration & Community



In early August, the new Board of Directors gathered for a half-day retreat. It was a day filled with energy, laughter, learning, and planning for the year ahead. I am excited to share some highlights with you.

### Learning & Leadership

We took time to discuss (for the new folks) how our board meetings are run, clarify responsibilities of each role, and how to lead committee meetings, all to ensure that we are using our time effectively to make decisions affecting the membership.

### Building Connections

We engaged in a few fun games and team-building activities that helped us get to know one another on a more personal level. During "Board Member Bingo" we discovered who is bi-lingual, worked as a lifeguard, traveled abroad, has a garden, doesn't like tomatoes and so many more interesting items. Turns out, we have a lot in common, and learned a lot about each other, strengthening our bond as a new team.

### Crafting Our Theme

In breakout groups, we brainstormed, utilizing 20 inspiration words to get us started, to identify a unifying theme that reflects our mission. We agreed on:

***Cultivating Excellence Through Collaboration & Community***

The goal this year is to work on collaborating and partnering with each other, our local legal community, other associations, NALA at the national level, and the tri-state community, to support and promote the paralegal profession.

### A Day of Fun and Inspiration

Lunchtime featured a lively trivia game on law-related movies, ("My Cousin Vinny" is good for many hilarious quotes) which sparked a lot of laughter and prizes. We closed the day with a toast to the Cincinnati Paralegal Association and to our theme for the year ahead.

### Looking Ahead

By the end of the retreat, we all felt a renewed energy with a shared vision. We are excited to roll out our new initiatives, (like *Sidebar Sessions*), multiple fun social and professional events, and educational opportunities designed to help our members grow professionally and personally. We invite you to get involved, and attend our meetings and events. Here's to an exciting year of cultivating excellence through collaboration, and commUNITY!

Sincerely,

Cheryl Hufford,  
OSBA Certified Paralegal,  
President 2025-2026



### In this newsletter

Upcoming  
Meetings &  
Events

Legal News

Investigative  
Tips for  
Litigation  
Paralegals

Social Clubs,  
Volunteer  
Opportunities

Paralegal Jobs

Member News



# Upcoming Meetings & Events

## September General Membership Meeting: Changes to Ohio Notary Law

Join us on Thursday, **September 11, 2025** at 12 noon via ZOOM for important information about recent updates to notary laws. Whether you are a notary, have a desire to become a notary, or just want to learn, grab your lunch and hop on!

This meeting is pending credit for 1.0 hours of continuing legal education from the Ohio State Bar Association.

Any member may attend for free.

[Register Here](#) to receive the Zoom link

C. Allen Nichols, MLS, MBA, is the CEO & Executive Director of Ohio Notary Services in Akron will give a thorough overview of 2025 notary law updates. Ohio Notary Services is the only entity authorized to provide education and testing for remote online notary (RON) authorization in Ohio. Ohio Notary Services partners with the Akron, Cincinnati, Cleveland, Dayton and Toledo bar associations, and the Ohio State Bar Association.



### *Tip of the Month*

Clear, professional communication—both in writing and speaking—is one of the most valuable skills a paralegal can offer.

The words you choose and the grammar you use matter just as much as the message itself.

By ensuring your communications are accurate and polished, you reflect positively on both yourself and your firm, while gaining trust and respect from your attorneys and clients.

The more you read and write professional emails, the stronger your communication skills will become.



Here are some common mistakes and how to correct them:

Incorrect:

Here is a agenda/  
e-mail/investment/order.

Correct: Here is AN agenda...

Incorrect:

He/she don't know =  
he/she do not know.

Correct:

He/she DOESN'T know =  
he/she does not know.

Incorrect: I seen your e-mail.

Correct:

I SAW your e-mail or  
I HAVE SEEN your e-mail.

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# Upcoming Meetings & Events

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## October General Membership Meeting: Nursing Home Medicaid Planning: How to Help Your Parents

**October 7, 2025**, 12 noon via ZOOM

Many of us have aging parents or are already experiencing the difficult decisions that have to be made during their golden years. Attorney David D. Kammer of Niehaus Law Office on Cincinnati's West Side, will discuss rules for eligibility, goals of Medicaid planning, planning strategies, and why it's important for Medicaid applicants and spouses to be represented by an attorney. Mr. Kammer's practice areas include elder law, Medicaid planning, estate planning, and estate administration.

This meeting is pending credit for 1.0 hours of continuing legal education from the Ohio State Bar Association.

Any member may attend for free.  
[Register Here](#) to receive the Zoom link.



## November General Membership Meeting: The Ethics of Conflicts of Interest



**November 19, 2025**, 12 noon via ZOOM

Ellen Lockwood, ACP, RP, will cover some of the most common conflicts of interest in the paralegal profession and how to avoid them, ethical walls, and conflicts that pertain to notaries.

Ellen received her B.A. in Music from Southwestern University and her paralegal certificate from Southwestern Professional Institute. She is a past president of the Paralegal Division of the State Bar of Texas and Chair of the Professional Ethics Committee. Ellen is the lead author of the Division's *Paralegal Ethics Handbook* published by Thomson Reuters. She is a past president of the Alamo Area Paralegal Association and a frequent speaker and writer on paralegal ethics. In 2008, Ellen received the San Antonio Paralegal of the Year award and the Paralegal Division's Award of Excellence. She has over 30 years of paralegal experience, including 17 years in-house. Ellen currently works as a trademark paralegal with Schwegman, Lundberg & Woessner.

This meeting is pending credit for 1.0 CLE hour of Professional Conduct from the Ohio State Bar Association.

Any member may attend for free.  
[Register Here](#) to receive the Zoom link.

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# Upcoming Meetings & Events

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## American Alliance of Paralegals & CPA Co-Host Networking Event

The Cincinnati Paralegal Association is excited to announce its first in-person networking event co-hosted by the American Alliance of Paralegals, Inc., a national paralegal association! This special evening is designed to bring together paralegals and paralegal students from across the Greater Cincinnati area to connect, collaborate, and celebrate the profession.

Whether you're a member of either association or not, this event is free and open to all paralegals and students. Come enjoy drinks, hors d'oeuvres, and the chance to meet others who share your passion for the paralegal profession. We are honored to welcome Christian Gonzalez, Chief Legal Officer of Fifth Third Bank, National Association, and former Partner at Dinsmore & Shohl, LLP, who will share insights from his distinguished legal career and offer inspiration to paralegals at every stage of their professional journey.

**While the event is free, registration is required. Please register online [HERE](http://www.cincinnati-paralegals.org) or at [www.cincinnati-paralegals.org](http://www.cincinnati-paralegals.org).**

**Registration is now open.**

### Event Details

- Who: ALL Paralegals in the Greater Cincinnati Area – Membership in the American Alliance of Paralegals and/or Cincinnati Paralegal Association is not required
- What: Networking Event to Celebrate the Greater Cincinnati Paralegal Community
- When: **Tuesday, October 7, 2025**
  - Doors open at 5:30 p.m.
  - Speakers begin at 6:00 p.m.
- Where: Dinsmore & Shohl LLP, 255 E. Fifth Street, 19<sup>th</sup> Floor, Cincinnati, OH 45202

Be sure to visit with our sponsors and vendors during the event and stick around for a basket raffle at the end of the evening — great prizes and a fun way to wrap up the night! Grab your favorite paralegal teammates and join us for an evening of connection, conversation, and community. We look forward to seeing you there!



**American Alliance of Paralegals, Inc.**





# Legal News



## Federal court filing system hit in sweeping hack

The identities of confidential court informants are feared compromised in a series of breaches across multiple U.S. states.

 Politico / Aug 7



<https://www.politico.com/news/2025/08/06/federal-court-filing-system-pacer-hack-00496916>



## Overcoming Lawyers' Resistance to Adopting Legal Tech

Getting legal tech right is tough. Overcoming lawyers' resistance to adopting legal tech is tougher. Here's how to succeed at both.

 Today's General Counsel / Aug 15

[https://todaysgeneralcounsel.com/overcoming-lawyers-resistance-to-adopting-legal-tech/?utm\\_source=LGO-NL&utm\\_medium=email](https://todaysgeneralcounsel.com/overcoming-lawyers-resistance-to-adopting-legal-tech/?utm_source=LGO-NL&utm_medium=email)



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# Investigative Insights for Litigation Paralegals: A Private Investigator's Perspective

By Dean Boerger, Private Investigator

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Paralegals are the backbone of litigation teams. You gather records, draft pleadings, prepare exhibits, and keep the case machine running smoothly. But in the trenches of civil litigation, one tool often remains underused or misunderstood—the private investigator. After more than twenty-five years in the investigative field, I've seen paralegals transform their efficiency and case outcomes by learning how to integrate investigative resources effectively. This article is designed to give litigation paralegals practical tips, best practices, and cautionary notes from an investigator's perspective.

## The Paralegal-Investigator Connection

Attorneys frequently focus on legal strategy and courtroom presentation, but paralegals deal directly with the evidence: medical records, financial statements, deposition summaries, and witness lists. Investigators, on the other hand, specialize in uncovering facts outside the four corners of discovery. When paralegals understand how to leverage investigative services, the entire litigation team gains a sharper edge.

Your role is not to “do the investigation” but to coordinate, direct, and manage the flow of information. A skilled investigator becomes an extension of your work—developing facts, documenting findings, and producing material that integrates seamlessly into pleadings, depositions, and trial exhibits.

## When to Call in an Investigator

Many paralegals hesitate to involve investigators early, often waiting until discovery deadlines loom or a deposition is around the corner. From my experience, here are the critical points where your involvement with an investigator can be case-changing:

**1. Witness Location & Backgrounds** - Locating reluctant witnesses, verifying addresses, and assessing credibility through background investigations are tasks where an investigator saves weeks of wasted time.

**2. Surveillance for Civil Defense** - In personal injury cases, surveillance can make or break a defense strategy. But surveillance requires planning, proper legal boundaries, and integration with discovery deadlines.

**3. Social Media Investigations** - What people post online—photos, videos, check-ins—can contradict claims made in court. Investigators with tools for preserving metadata and authenticating social media provide evidence that withstands judicial scrutiny.

**4. Asset & Property Traces** - Whether in civil recovery or marital litigation, asset investigations reveal hidden ownership or transfers. This is an area where paralegals often benefit from investigators who can pull records from multiple jurisdictions.

**5. Testimonial Preparation** - Investigators often testify. Coordinating early allows you to shape reports and exhibits in ways that match courtroom needs.

## Practical Tips for Litigation Paralegals

### 1. Define the Assignment Clearly

The most common breakdown between paralegals and investigators is vague instructions. Instead of saying, “Can you check out this witness?” provide:

- The case caption and court.
- The specific questions you need answered.
- Deadlines aligned with discovery or trial.

An investigator works more efficiently when the scope is precise.

### 2. Preserve Chain of Communication, Not Chain of Custody

Paralegals often worry about whether investigators keep “chain of custody logs” like police departments. In civil litigation, that's usually unnecessary. What matters is proper documentation, secure storage of video/photos, and clear communication of how the material was obtained.

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### 3. Stay Ethical and Licensed

Never ask an investigator to cross legal or ethical boundaries. For example, accessing bank records without consent or using pretext to obtain phone records is unlawful. As a paralegal, always confirm the investigator is properly licensed and insured in your jurisdiction. Courts can—and do—exclude evidence tied to improper methods.

### 4. Make the Reports Court-Ready

A good investigative report should look like a deposition summary: neutral, factual, and free from argument. As a paralegal, insist on professional formatting. That way, you can drop it directly into exhibits, affidavits, or attorney trial notebooks.

### 5. Use Investigators for Pre-Deposition Prep

Imagine preparing for a deposition where you already know:

- The witness's criminal history.
- Their business affiliations.
- Their public social media statements about the case.
- Paralegals who integrate investigator findings into witness files give attorneys sharper questioning strategies.

### Case Studies: Lessons from the Field

#### The Personal Injury Plaintiff Who Posted Too Much

A plaintiff claimed permanent back injuries after a trucking accident. The paralegal requested a social media review. Within a week, my team documented the plaintiff lifting weights in a gym, dancing at a wedding, and traveling cross-country by car—all timestamped and preserved with metadata. At mediation, the case value dropped dramatically. The paralegal's foresight to request social media investigation early saved the defense hundreds of thousands in exposure.

### The Missing Witness in a Contract Dispute

In a multi-state business litigation case, a critical witness vanished. The paralegal supplied the old address, date of birth, and corporate affiliations. We traced utility records and property filings to find the witness had relocated across state lines. He was subpoenaed in time, and his deposition provided the missing piece of the defense strategy.

### Surveillance in Workers' Compensation

In one case, a claimant alleged total disability but was observed coaching youth sports, carrying equipment bags, and running drills. The paralegal coordinated surveillance schedules with discovery deadlines. When the claimant denied physical activity in deposition, video evidence was ready for impeachment.

These examples highlight how paralegals who engage investigators strategically elevate case outcomes.

### Common Pitfalls Paralegals Should Avoid

**1. Waiting Too Long** – Investigations rushed at the last minute lead to poor results. Build investigators into the litigation calendar early.

**2. Overreliance on Google** – While basic searches are useful, professional databases and fieldwork uncover much more. Don't try to substitute an investigator's resources with free searches.

**3. Improper Communication Channels** – Always funnel communications through secure methods. Don't text sensitive assignments or forward client social media links without context.

**4. Assuming Investigators "Know the Law"** – Some investigators lack courtroom experience. As a paralegal, you must confirm they understand civil rules of evidence and the standards for admissibility in your jurisdiction.

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## Building an Effective Working Relationship

From my perspective, the paralegals who get the best investigative results share certain traits:

- They treat investigators as part of the legal team rather than an outside vendor.
- They communicate deadlines clearly and explain how the evidence will be used.
- They respect professional limitations, never asking for shortcuts that risk ethical violations.
- They provide feedback, letting investigators know how reports and testimony played in court.

Over time, this builds a cycle of trust where the investigator tailors work product to the exact needs of your attorneys.

## The Bigger Picture: Why This Matters

Litigation is not just about legal arguments—it's about facts. Judges and juries respond to evidence that is credible, clear, and corroborated. Paralegals are uniquely positioned to bridge the legal theory developed by attorneys with the factual groundwork uncovered by investigators.

Think of investigators as your field team. You assemble the record; they supply the raw material that doesn't come from subpoenas or document production. Together, you create a case that is stronger, faster, and more efficient.

## Final Thoughts

Paralegals who master the integration of investigative resources stand out. You not only streamline attorney workloads but also safeguard your firm from weak or missing evidence. In today's litigation environment—where juries expect video, digital records, and hard proof—investigators are no longer optional; they are essential.

As an experienced investigator, I can say this without hesitation: the best paralegals I've worked with are the ones who know when to pick up the phone, give me the precise assignment, and fold my findings seamlessly into their litigation strategy. If you do that, you'll not only support your attorneys—you'll help shape the very outcomes of the cases you touch.

**DISCLAIMER:** *The information contained in this article is provided for informational and investigative support purposes only. It does not constitute legal advice. Any investigative actions or enforcement measures taken in relation to a litigated matter should be conducted in consultation with a licensed attorney. Boerger Investigative Services, LLC assumes no liability for the use or interpretation of this information outside of its intended litigation support role.*

*Dean Boerger is the Founder and Chief Investigator at Boerger Investigative Services, LLC, a licensed private investigation agency in Indiana, Ohio, West Virginia and Washington DC with national and international resources. For more information visit: [www.BoergerPI.com](http://www.BoergerPI.com) or contact Dean by email at [dean@boergerpi.com](mailto:dean@boergerpi.com)*

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# Volunteer Opportunity

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September 5 is the International Day of Charity.  
The CPA is partnering with Legal Aid Society of  
Greater Cincinnati to support the vital work they do  
for individuals and families in need.



The International Day of Charity is a United Nations-designated annual day on September 5th to recognize and encourage acts of giving and philanthropy worldwide, aimed at mobilizing people and organizations to work against poverty and human suffering. The date was chosen to commemorate the death anniversary of Mother Teresa, a globally recognized symbol of compassion and service to the poor.

## Here's how you can make a difference:

Donate \$5 (or any increment of \$5) to the cause. Together, our small contributions can create a big impact.

Every dollar raised will go directly to Cincinnati Legal Aid, helping ensure access to justice for those who need it most.

## [Donate Now](#)

Date and Time to Donate:

**Friday, September 5, 2025**

Through

**Monday, September 8, 2025**

Closes at 6:00 pm

<http://www.lascinti.org>



# Social Clubs



## Join The Foodie Club for Dinner!

**Come dine with us!** Are you in the mood for Italian? You're in luck. The foodie club will be meeting at

*Mama's*

621 Main Street  
Covington, KY 41011

**Tuesday, September 16<sup>th</sup>  
at 5:15 pm**

All are welcome  
Invite your friends and family

RSVP Here, on our website or  
email Sara Hosler  
[sara@debra-law.com](mailto:sara@debra-law.com)



## What The Book Club is Reading

**The August/September book is**

**Jane and Dan at the  
End of the World**

Discussion is Thursday, **September 25th at 6-6:30 p.m.**, via Zoom. [Click here](#) to join the meeting.

Download the Fable app then join the CPA's private book club using this [link](#). The app provides chapter-by-chapter comments, reactions, and notes. The Fable app is available on all devices.

All are welcome for fun and spirited conversation — even if you haven't finished the book!

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# Social Clubs

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The **Wellness Club** invites you to attend the Kroger Wellness Festival with us **on Friday, September 26!** Join the CPA's Wellness Club for a stroll down 5th street. We'll be walking the booths, getting tons of free samples, food, exploring wellness tips, and enjoying the vibrant energy of the Kroger Wellness Festival!

Connect with other CPA members, make new friends, enjoy meaningful conversations, and get your steps in along the way AND tons of FREEBIES!

## What is it?

A free festival focusing on health and wellness, plus a fun opportunity to showcase new brands, products and services through sampling and education.

## Where is it?

The festival is located in downtown Cincinnati on 5th Street. The festival starts at Main Street and ends on Columbia Parkway.

Our route: Meet us on the SW corner of 4th and Broadway, outside the Queen City Club, at 12:00PM. We will walk from Broadway to Sentinel. Come and go as you please during your lunch or make some extra time to spend with the CPA Wellness Club!

Be sure to **RSVP here** so we know to wait for you!



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# CPA Job Board

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## Positions Available

Today's job market is Hot! More job opportunities are available for fewer candidates, and the paralegal profession is no exception. The CPA Jobs Board is a great place to look for a new position. Check out these exciting opportunities in the Members Only section of the website at [cincinnati.paralegals.org](http://cincinnati.paralegals.org). New jobs are posted every month!

**These Positions Are Now Posted on the Job Board. Click the Job Board Button on our Website for Details and to Apply.**

## [Job Opportunities For You](#)

**Paralegal** - Newport, KY law firm

**Litigation Paralegal** - Cincinnati, OH Law Firm

**Paralegal** - Mason, Ohio



# Member News



## *Jena Rohan Promoted to Senior Paralegal*

We are proud to recognize CPA member and Events Coordinator, **Jena Rohan**, a valued member of Myriad Genetics' in-house legal team. Jena has been with Myriad for over five years and was recently promoted from Paralegal to Senior Paralegal. In her role, she provides critical support across a wide range of areas, including Litigation and Payor Market matters, as well as legal guidance for the Mental Health business unit and Compliance group. Her work spans contracting, marketing, materials review, and other essential legal needs that help strengthen Myriad's mission.

**About Myriad Genetics:** Myriad is a leading molecular diagnostics company dedicated to advancing genetic testing to improve the prevention, diagnosis, and treatment of disease. The company's innovations support patients and providers across hereditary cancer, prostate cancer, women's health, and mental health.

Congratulations, Jena!

## *Welcome New Member!*

Welcome new member, **Natalie Mosko**! Natalie is a student at the University of Cincinnati, Clermont College. Showing her smarts, Natalie made the great decision to join the CPA in August.



## *HAPPY BIRTHDAY!*



*September 6 - Alexandra (Ally) Guljas*

*September 8 - Kathleen Bohman*

*September 8 - Nancy Brooks*

*September 8 - Vicki Campbell*

*September 19 - Margaret (Meg) Wagner Piedel*

*September 28 - Hannah Need*



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# Thank You to Our Sustaining Members

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We ♥ our Sustaining Members! These entities support the CPA with their membership, donations, and many other contributions:



[Boerger Investigative Services](http://www.boergerpi.com)



[Greentree Legal Process Servers](http://www.greentreelegal.com)



<https://ohioreporters.com>



<https://ammannprocessservers.com/text>



<https://lawrencelaws.com>

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# Thank You to Our Sustaining Members

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<https://www.veritext.com/>



<https://zimmerlawfirm.com/>



<https://uslegalsupport.com>



<https://www.proofserve.com/>



[TP.One A Lexitas Company](https://www.lexipol.com/tp-one)

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# CPA Board

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Position	Name	Email
President	Cheryl Hufford	<a href="mailto:president@cincinnatiaparalegals.org">president@cincinnatiaparalegals.org</a>
Vice President & Director of Marketing & Events	Accepting Candidates	<a href="mailto:vp-marketing@cincinnatiaparalegals.org">vp-marketing@cincinnatiaparalegals.org</a>
Events Coordinator	Jena Rohan	<a href="mailto:events@cincinnatiaparalegals.org">events@cincinnatiaparalegals.org</a>
Vice President & Director of Membership	Sara Hosler	<a href="mailto:membership@cincinnatiaparalegals.org">membership@cincinnatiaparalegals.org</a>
Secretary	Leslie Adams	<a href="mailto:secretary@cincinnatiaparalegals.org">secretary@cincinnatiaparalegals.org</a>
Treasurer	Accepting Candidates	<a href="mailto:treasurer@cincinnatiaparalegals.org">treasurer@cincinnatiaparalegals.org</a>
Parliamentarian	Kelly Grace Hickey	<a href="mailto:parliamentarian@cincinnatiaparalegals.org">parliamentarian@cincinnatiaparalegals.org</a>
Professional Development	Paul McKibben	<a href="mailto:profdev@cincinnatiaparalegals.org">profdev@cincinnatiaparalegals.org</a>
Social Media & PR	Jackie Scheibenzuber	<a href="mailto:public_relations@cincinnatiaparalegals.org">public_relations@cincinnatiaparalegals.org</a>
Student Affairs	Accepting Candidates	<a href="mailto:student_affairs@cincinnatiaparalegals.org">student_affairs@cincinnatiaparalegals.org</a>
Website Administrator	Lauren Burgher	<a href="mailto:administrator@cincinnatiaparalegals.org">administrator@cincinnatiaparalegals.org</a>
Continuing Legal Education	Emily Cowles	<a href="mailto:cle@cincinnatiaparalegals.org">cle@cincinnatiaparalegals.org</a>
Newsletter	Angela Baker-Colyer	<a href="mailto:newsletter@cincinnatiaparalegals.org">newsletter@cincinnatiaparalegals.org</a>
Pro Bono & Volunteering	Kristen Guckenburger-Adams	<a href="mailto:probono@cincinnatiaparalegals.org">probono@cincinnatiaparalegals.org</a>

### Editor's Comment

The Cincinnati Paralegal Association, an Ohio nonprofit corporation, is committed to the professional development of the individual paralegal and the paralegal profession, the establishment and support of professional standards, and the advancement of paralegals as an integral and distinctive partner in the delivery of legal services.

The opinions expressed in The Paralegal Resource are those of the writers and not necessarily those of the Cincinnati Paralegal Association. Information in The Paralegal Resource is based solely on material submitted in writing. The Cincinnati Paralegal Association assumes no responsibility for verification of the information submitted. Paid advertisements appearing in The Paralegal Resource are not an endorsement of products or services.



### CINCINNATI PARALEGAL ASSOCIATION

[www.cincinnati-paralegals.org](http://www.cincinnati-paralegals.org)

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