

SEMINAR OUTLINE

I. INITIAL INTERVIEWS AND PLEADINGS

- 9:00 - 9:40, Hon. Susan E. Block
- Effective Screening and Conflict Checking Processes
 - Initial Interview and Fact Gathering
 - Assisting with Initial Pleadings and Motions

II. DISCOVERY GUIDELINES

- 9:40 - 10:20, Hon. Susan E. Block
- Formal and Informal Discovery Methods
 - Interrogatories and Request for Production of Documents
 - Answering Discovery Requests
 - Analysis and Summary of Documents

III. CASE MANAGEMENT TIPS

- 10:35 - 11:10, Sharon E. Cody and Michael C. Todt
- Creating a Comprehensive Divorce Checklist
 - Calendaring and Follow-Up Systems
 - Organizing, Indexing and Tracking Client Documents
 - Document Management Strategies for Produced Materials
 - Tips and Techniques for Effective Time and Task Management

IV. KEYS TO MANAGING FINANCIAL INFORMATION

- 11:10 - 12:00, Greg L. Roberts
- What Documents are Important?
 - Finding "Hidden" Information
 - Characterizing Assets and Liabilities
 - Financial Analysis and Balance Sheet Preparation
 - Real Property
 - Personal Property
 - Debts and Liabilities
 - Retirement Plans/Pensions
 - Investments
 - Business Interests
 - Other Key Assets and Liabilities
 - Working with Financial Experts
 - Drafting the Financial Disclosure Statement

V. CHILD SUPPORT AND CUSTODY ISSUES

- 1:00 - 1:45, Michael C. Todt
- Determining and Calculating Child Support
 - Preparing Child Support Worksheets
 - Arrearage Calculations and Wage Assignments
 - Working with Child Custody Experts
 - Drafting of Parenting Plans, Agreements and Schedules

VI. YOUR ROLE DURING SETTLEMENT AND TRIAL

- 1:45 - 2:30, Kirk C. Stange
- Initial Drafting of Legal Documents
 - Preparation of Trial Exhibits and Notebooks
 - Management of Experts and Lay Witnesses

VII. QUALIFIED DOMESTIC RELATIONS ORDERS (QDROs)

- 2:45 - 3:30, Sharon E. Cody
- What is a QDRO?
 - Why do We Need QDROs?
 - Why Retirement Accounts are Different from Other Assets?
 - What Can I do as a Paralegal to Help the Managing Attorney Prepare to Divide a Retirement Account?
 - Timing Issues and Helping the Client Get Their Money

VIII. ETHICAL QUESTIONS

- 3:30 - 4:30, Paola Arzu Stange
- Avoiding Situations That May Expose You to UPL
 - Evaluating Conflicts of Interest
 - Managing Issues of Privilege

*If needed, the above agenda may be changed to best accommodate all of our attendees.

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Divorce Cases From Start to Finish for Paralegals

70563

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A Paralegal's Guide

Divorce Cases From Start to Finish

» Build Your Skills to Confidently Take on These Cases

ST. LOUIS, MISSOURI
 November 5, 2015

FACULTY
 Hon. Susan E. Block
 Sharon E. Cody
 Greg L. Roberts
 Kirk C. Stange
 Paola Arzu Stange
 Michael C. Todt

CREDIT INFORMATION
 NALA - 6.0 (Incl. 1.0 ethics)
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