

# PBA FAMILY LAW SECTION

## *Winter Meeting*



Up to 9.5 hours of CLE  
credit, including  
2 ethics credits

Hospitality suite  
in the historic  
Montgomery House

Luncheon speaker on  
body language and projecting  
personal power

**JANUARY 16-18, 2015**  
**LANCASTER MARRIOTT AT PENN SQUARE,**  
**LANCASTER**



## PBA FAMILY LAW SECTION

# Winter Meeting



It is my honor to extend a warm invitation to each of you to the Pennsylvania Bar Association Family Law Section Winter Meeting, which takes place at the Lancaster Marriott at Penn Square, Jan. 16-18, 2015. The Lancaster Marriott sits in the hub of vibrant downtown Lancaster — a national historic district — near the Central Market, the Fulton Theatre and the Red Rose City's unique shopping and dining district. Although the full amenities offered by the Lancaster Marriott make it unnecessary to leave the hotel, you will want to take the opportunity to stroll through historic downtown Lancaster and experience the wonderful dining, shopping and cultural activities.

We will start a weekend of top-notch CLE with a presentation by the American Academy of Matrimonial Lawyers titled "Drinking from the Fire Hose," designed to help us cope with the onslaught of data we encounter in a modern family-law practice. We then kick off the weekend with our welcome reception on Friday evening. Our first plenary session on Saturday morning is a nontraditional program on "Memory Training." This will be followed by a presentation in which a panel of experienced family-law judges will discuss "Effective Courtroom Tactics and Techniques."

For Saturday's lunch, in keeping with our tradition of having a luncheon speaker, we will hear from William Acheson on projecting personal power and on nonverbal communication and body-language cues. In the afternoon we will have multiple breakout workshops, including sessions on alternative dispute resolution, challenging custody issues, finding foreign assets and our new and improved case law and rules updates.

Finally, on Sunday morning, we will have our business meeting, followed by a two-hour ethics potpourri plenary session titled "Ethics from the Bench and Beyond," to assist us in staying on the straight and narrow and in fulfilling the CLE ethics requirement.

The 2015 PBA Family Law Section Winter Meeting offers up to 9.5 hours of CLE credit. In addition, we are fortunate enough to be provided access to the Montgomery House, a historic brick home located inside the lobby of the Lancaster Marriott, for our hospitality suite on Saturday evening. Be sure to join us at this unique event.

Please do not miss this opportunity to be a part of a great meeting and to catch up and socialize with fellow practitioners from across the state. I look forward to spending this special January weekend with you in Lancaster.

*J. Paul Helvy, Esq.*  
PBA Family Law Chair



*J. Paul Helvy*



The Section gratefully acknowledges CBIZ for their generous support as a sponsor of our meetings.



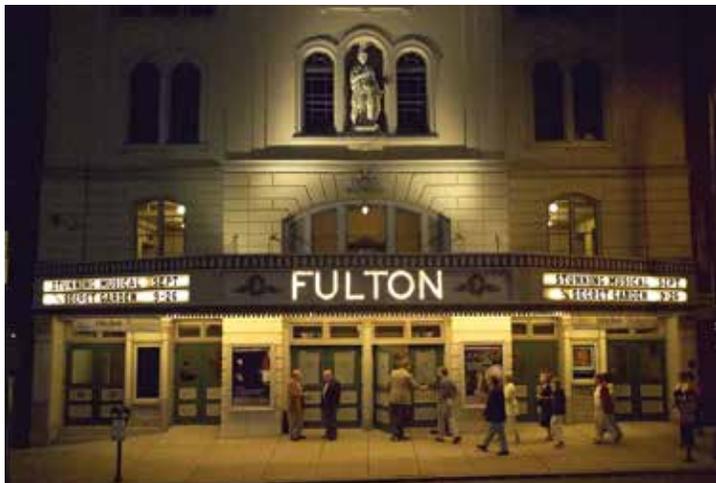
The Section gratefully acknowledges BNY Mellon Wealth Management for their generous support as the primary sponsor of our annual meetings.



The Section gratefully acknowledges McGladrey LLP for their generous support as a sponsor of our meeting.

## THE LANCASTER MARRIOTT AT PENN SQUARE HOTEL

The PBA Family Law Section Winter Meeting will be held at the Lancaster Marriott at Penn Square Hotel, located in downtown Lancaster (a National Historic District), near the Central Market, the Fulton Theatre and unique shopping and dining.



*photo courtesy padutchcountry.com*

### HOTEL AMENITIES

Artfully balancing old with new, the stylish Lancaster Marriott provides plenty of modern services and amenities for guests to enjoy.

- The Mandarin Rose Spa — inspired by the Red Rose City of Lancaster. Experience a signature massage and let your stresses melt away.
- An indoor pool, whirlpool and fitness center with cardiovascular equipment and free weights is complimentary to hotel guests.
- The Lancaster Marriott offers posh décor combined with comfortable, contemporary amenities, and luxury bedding.

### TRAVEL AND PARKING

The Lancaster Marriott at Penn Square is located in the heart of Lancaster, easily accessible by car. The hotel offers valet parking for \$30 per overnight and on-site garage parking for \$11 per night. For air travel, Lancaster is serviced by Harrisburg International Airport (MDT). For GPS directions to the hotel use 25 South Queen Street, Lancaster, and for the self-parking garage use 38 South Duke Street, Lancaster.

### HOTEL RESERVATIONS

The PBA has reserved a block of guest rooms at the Lancaster Marriott at Penn Square over the conference dates. Guest room reservations can be made directly with the hotel by calling 800-228-9290 and referencing Pennsylvania Bar Association Family Law Conference 2015 or by clicking [HERE](#) before Wednesday, Dec. 24, 2014. The group rate is \$121 per night, plus taxes, for standard room accommodations. Check-in time is 4 p.m., and check-out time is noon.

### ASSISTANCE WITH REGISTRATION FEES

The Joanne Ross Wilder Memorial Family Law Section Scholarship is available through the Membership Incentive Program to cover registration fees for the Family Law Section's 2015 Winter Meeting. Eligible recipients must be section members who are: a) young/new to the practice; b) from a solo practice or a small firm; c) from counties that have been under-represented at section meetings. Interested applicants should forward their CV and a brief statement as to why they are eligible for the scholarship to the attention of Pamela Kance at the Pennsylvania Bar Association, P.O. Box 186, Harrisburg, Pa. 17108, or [Pam.Kance@pabar.org](mailto:Pam.Kance@pabar.org). Application for this program must be made on or before Dec. 5, 2014.

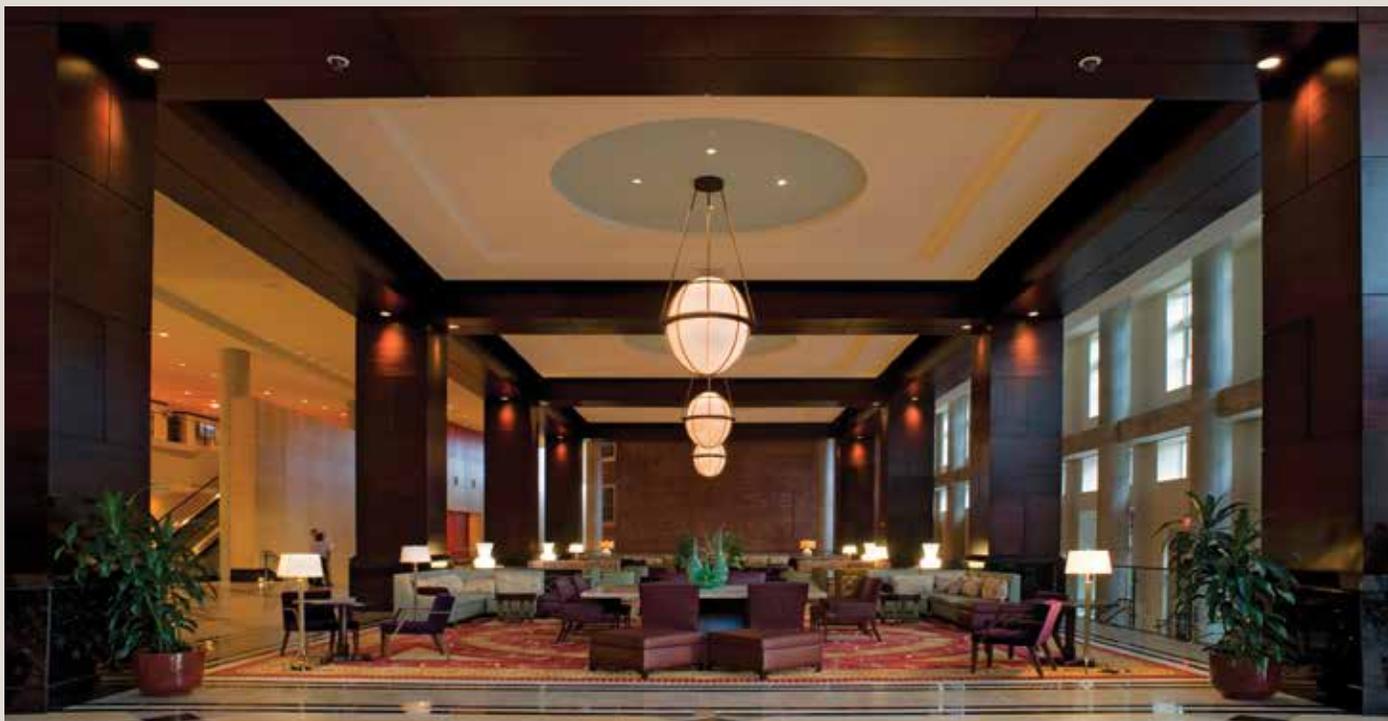


## LATE REGISTRATIONS

The registration deadline is close-of-business on Dec. 29, 2014. Registrations received after that date will be charged an additional \$50 late fee and will be accepted on a space-available basis only.

## CANCELLATION POLICY

Written cancellations must be received before close-of-business on Dec. 29, 2014. Upon receipt, a refund will be issued minus a \$75 administrative fee. Any cancellations received after 5 p.m. on Dec. 29, 2014, will not receive a refund.



## ONLINE REGISTRATION

To reach your PBA member personal dashboard to register for the meeting, go to [www.pabar.org](http://www.pabar.org) and click on the “Member Login” link at the upper right of the home page.

## COURSE MATERIALS

Covered by your registration fee, a URL secure link will be emailed to you prior to the meeting for you to download, view and print those materials you wish. A memory stick version is available for an additional fee of \$10. The traditional printed materials in book form will cost \$50. Memory sticks and books will be distributed at registration.

## PHOTOGRAPHY DISCLAIMER

The PBA photographs and videotapes some of its programs for later use. Your presence at PBA activities serves as your consent to use of your appearance

or likeness by the PBA and its licensees, designees or assignees in all media, worldwide, in perpetuity. Questions or concerns should be directed to the PBA Communications Department at 800-932-0311 or [communications@pabar.org](mailto:communications@pabar.org).

## CLE CREDITS

The Pennsylvania Bar Institute is approved by the Pennsylvania Supreme Court Continuing Legal Education Board as an accredited CLE provider. The PBA Family Law Section Winter Meeting has been approved by the Pennsylvania Continuing Legal Education Board for up to 9.5 hours of CLE credit. To receive credits, you must complete and submit the indicated forms following the program.

**PENNSYLVANIA BAR INSTITUTE**  
*Continuing Education Arm of the Pennsylvania Bar Association*  
BRINGING EXCELLENCE TO CLE

# SCHEDULE OF EVENTS

*(Current as of time of printing but subject to change)*

## Friday, January 16

1 p.m. – 7 p.m.

Registration/Exhibits

1:30 p.m. – 3 p.m.

AAML Program

### “Drinking from the Fire Hose: A Family Lawyer, Technology Consultant and Practice Management Consultant Discuss How to Cope with the Onslaught of Data You Encounter in a Modern Family Practice”

A modern family law practice requires that you keep up with hundreds of daily emails, voice messages, texts and attachments, all while meeting deadlines and unrealistic expectations. You must delegate effectively, monitor progress, build organizational knowledge, adapt to change, balance your work and life, provide outstanding client service and meet your ethical and professional responsibilities. In 90 minutes we can't teach you to do all this, but we can provide useful information and tips, including software and best practices.

*Moderator:* Brian C. Vertz

*Panelists:* Joel B. Bernbaum; Ellen Freedman, CLM, Freedman Consulting Inc.; Alicia Slade, Technology Consultant, Plummer Slade Inc.

*1.5 Substantive CLE Credits*

3:30 p.m. – 5:30 p.m.

Council Meeting

7 p.m. – 9 p.m.

Welcome Reception

## Saturday, January 17

7:30 a.m. – 5 p.m.

Registration/Exhibits

7:30 a.m. – 8:20 a.m.

Breakfast

*(Please note that breakfast is open only to meeting registrants and is not intended for family members or guests.)*

8:30 a.m. – 8:40 a.m.

Welcome & Introductions

8:45 a.m. – 10:15 a.m.

### Plenary Session: “Memory Training”

How to remember names and faces, presentations, to-do lists, key client information and important details from books, meetings and conversations.

*Speaker:* Matthew Goerke

*1.5 Substantive CLE Credits*



*Matthew Goerke*

10:15 a.m. – 10:30 a.m.

Break

10:30 a.m. – 12 p.m.

Plenary Session

### “Effective Courtroom Tactics and Techniques: How to Improve Your Presentation”

Do you ever wonder what judges really do and don't want to hear at trial? This is an opportunity to learn first-hand from our outstanding judicial panel exactly what matters most in custody, support, special-relief matters and more.

*Moderator:* David L. Ladov

*Panelists:* Hon. Linda A. Cartisano, Hon. Ann Marie Wheatcraft, Hon. David R. Workman, Hon. Margherita P. Worthington

*1.5 Substantive CLE Credits*

12 p.m. – 1:30 p.m.

Luncheon

*Keynote Speaker:*

William Acheson

### “Projecting Personal Power: Nonverbal Communication and Body-Language Cues”

To initiate and maintain long-term professional relationships with prospects and clients,

you must project three things: trustworthiness, competence and likeability. And not one of these can be projected verbally:

They are the product of nonverbal communication — body language. In our world, judgments are made almost instantaneously. In this session Bill will discuss how we project information about ourselves, and look at strategies for improving first impressions.



*William Acheson*



The Section gratefully acknowledges Savran Benson for their generous support of our luncheon.

## Saturday, January 17, continued

1:45 p.m. – 3:15 p.m.

### Workshops

#### A. “Unpredictable Yet Common Custody Issues”

In this day and age parents face many challenging issues relating to their children. Such challenges are tough for intact families but how do divorced parents make decisions when their opinions often differ? Who gets to decide what is right or wrong? Appropriate or inappropriate? At what age? This program will address thorny custody issues such as Internet safety and social-media use, home- and Internet schooling, drug and alcohol testing, traveling alone on an airplane, gun safety and more.

*Moderators:* Todd Begg, Julie E. Manser

*Panelists:* Hon. Joseph C. Adams, Hon. Leslie Gorbey, Hon. Robert J. Matthews

1.5 Substantive CLE Credits

#### B. “ADR: The Secrets to Having More Satisfied Clients and a Less Stressful Practice”

Three ADR practitioners will discuss how employing arbitration, mediation or collaborative law provides parties with the resources to resolve their cases with less acrimony. The program will also address how participating attorneys can arrive at creative solutions to challenging cases while emphasizing their role as counselor and maintaining control of their calendars.

*Moderator:* Mary Cushing Doherty

*Panelists:* Debra D. Cantor, Collaborative Law; Michael E. Fingerman, Arbitration; Selina J. Shultz, Mediation

1.5 Substantive CLE Credits

3:15 p.m. – 3:30 p.m.

### Refreshment Break

3:30 p.m. – 5 p.m.

### Workshops

#### C. “Finding Foreign Assets in Divorce: Using U.S. Tax Reporting Requirements as a Discovery Tool for Locating Foreign Assets”

The panelists will discuss new IRS reporting requirements relating to foreign investments. They will also discuss the crackdown on offshore tax evasion using secret bank accounts in various tax havens. Learn how to use the required disclosures to obtain information in a divorce by tailoring your discovery to locate offshore assets.

*Moderator:* Gerald L. Shoemaker Jr.

*Panelists:* G. Daniel Jones, CPA, CFF, Managing Director, CBIZ; Matthew D. Lee

1.5 Substantive CLE Credits

#### D. “Case Law, Rules and Legislative Updates”

A longtime favorite of attendees for updates on the recent case law developments in custody, support and equitable distribution, this interactive panel will offer their vast experience and provide practical pointers on how recent decisions may impact your daily practice. Chairs of the section’s Rules Committee and Legislative Committee will also provide up-to-date reports on recent rules from the Supreme Court and legislative activity on issues of importance to family law practitioners.

*Moderator:* Steven S. Hurvitz

*Panelists:* Hon. Jeannine Turgeon

Custody – Carla Schiff Donnelly, Steven S. Hurvitz

Equitable Distribution – Gail C. Calderwood, Adam H. Tanker

Support – Kristen B. Eberle, Ashley P. Murphy

Legislative – Pamela L. Purdy

Rules – David C. Schanbacher

1.5 Substantive CLE Credits

7 p.m. – 9 p.m.

### Farewell Reception

9 p.m. – 11 p.m.

### Dessert Hospitality



The Section gratefully acknowledges Brown Schultz Sheridan & Fritz for their generous support of our dessert hospitality.

## Sunday, January 18

8 a.m. – 10:45 a.m.

### Registration/Exhibits

8 a.m. – 8:30 a.m.

### Continental Breakfast/Section Meeting

8:30 a.m. – 9:30 a.m.

### Plenary Session

#### “Ethics from the Bench and Beyond”

The panel will discuss ethical aspects surrounding all areas of family law, including divorce, custody and support. The discussion will include both pre-trial, trial and post-trial ethical dilemmas encountered by counsel, with a perspective from the bench.

*Moderator:* Carol S. Mills McCarthy

*Panelists:* Hon. Thomas J. Doerr, Robert H. Davis Jr., Melaine S. Rothey

1.0 Ethics CLE Credit

9:30 a.m. – 9:45 a.m.

### Break

9:45 a.m. – 10:45 a.m.

### Plenary Session

#### “Ethics from the Bench and Beyond” (continued)

1.0 Ethics CLE Credit

# PBA FAMILY LAW SECTION WINTER MEETING

JANUARY 16-18, 2015 • LANCASTER MARRIOTT AT PENN SQUARE, LANCASTER

## REGISTRATION FORM

Name \_\_\_\_\_ Nickname or first name for badge \_\_\_\_\_

Address \_\_\_\_\_ Supreme Court ID # \_\_\_\_\_

Phone \_\_\_\_\_ FAX \_\_\_\_\_ Email \_\_\_\_\_

Name (and preferred nickname for badge) of Spouse/Guest(s) \_\_\_\_\_

Children Name(s) and Age(s) if attending events \_\_\_\_\_

Please check here if you or any of your guests require special services, including any special dietary needs. Please attach a written description of needs that includes the name of the individual.

Please check here if you are a first-time attendee.

### REGISTRATION FEE (Please check one):

Includes up to 9.5 hours of CLE credit; link to download course materials; Friday welcome reception; Saturday breakfast, lunch, reception and dessert hospitality; breakfast on Sunday.

PBA Section Member \$495                       PBA Member, Non-Section Member \$615 (includes Section membership for 2015)  
 Non-PBA Member \$715                       Judges & Judicial Law Clerks and those in practice 3 years or less \$320  
 PBA FLS Joanne Ross Wilder Scholarship Applicant \$0                      Amount Due \_\_\_\_\_

**LATE REGISTRATION FEE:** For registrations placed December 29, 2014, or later \$50                      Amount Due \_\_\_\_\_

### COURSE MATERIALS OPTION: In addition to URL link with course materials,

I would like to purchase a Memory Stick for \$10                      Amount Due \_\_\_\_\_  
 I would like to purchase a PBI "Blue Book" for \$50                      Amount Due \_\_\_\_\_

### CLE PROGRAMS: (Included in registration fee. Please check preference. Choice is used for planning purposes and is non-binding.)

Friday, 1:30 - 3 p.m.  AAML Program: Drinking from the Fire Hose  
Saturday, 8:45 - 10:15 a.m.  Memory Training                      10:30 a.m. - noon  Effective Courtroom Tactics and Techniques  
Saturday, 1:45- 3:15 p.m. Workshops:  A — Unpredictable Custody Issues OR  B — ADR  
Saturday, 3:30 - 5 p.m. Workshops:  C — Finding Foreign Assets in Divorce OR  D — Updates  
Sunday, 8:30 -10:45 a.m.  Ethics from the Bench and Beyond

### EVENING MEAL FUNCTIONS: (Registrant included in registration fee but, for planning purposes, please indicate the receptions you will attend.)

Friday Reception                       Saturday Reception & Dessert Hospitality  
Spouse/Guest:  
Friday: \$80 per person                      # of tickets \_\_\_\_\_ x \$80                      Amount Due \_\_\_\_\_  
Saturday: \$80 per person                      # of tickets \_\_\_\_\_ x \$80                      Amount Due \_\_\_\_\_  
Spouse/Guest attending parties are welcome to attend the Saturday Hospitality as guests of the Section.

### SATURDAY LUNCH: (Registrant included in registration fee but, for planning purposes, please indicate if attending.)

Saturday Lunch  
Spouse/Guest:  
Saturday Lunch: \$40 per person                      # of tickets \_\_\_\_\_ x \$40                      Amount Due \_\_\_\_\_

### METHOD OF PAYMENT:

A check, payable to PBA, is enclosed. Or charge my:  Master Card                       Visa                       AMEX                       Discover  
Account # \_\_\_\_\_ Exp. Date \_\_\_\_\_ Authorized Amount \_\_\_\_\_  
Billing Address \_\_\_\_\_

**REGISTRATION DEADLINE AND CANCELLATION POLICY:** Registration deadline for the meeting is December 29, 2014. After that date, all registrations will be accepted on a space-available basis and will incur a late fee of \$50. Written cancellations must be received before the close of business on December 29, 2014. Upon receipt, a refund will be issued, minus a \$75 administrative fee. After December 29, 2014, no refunds will be issued.

### RETURN COMPLETED REGISTRATION FORM AND PAYMENT BY DECEMBER 29, 2014 TO:

PBA Meetings Department, 100 South Street, Harrisburg, Pa. 17108

FAX CREDIT CARD REGISTRATIONS TO 717-213-2507

For more information, call the PBA Member Services Center at 800-932-0311

**Registrations will not be processed without payment.**

PBA FAMILY LAW SECTION

# Winter Meeting

JANUARY 16-18, 2015

LANCASTER MARRIOTT AT PENN SQUARE,  
LANCASTER



Non-Profit Org.  
U.S. Postage  
**PAID**  
Harrisburg, Pa.  
Permit No. 472

ADDRESS SERVICE REQUESTED

Pennsylvania Bar Association  
100 South St., PO Box 186  
Harrisburg, Pa. 17108

Your Other Partner

