

Agenda

Assisting with Family Law Case Intake

L. Wilgis

Assisting with initial client interview
Preparing engagement letter, opening file
Collecting information

Preparing Pleadings and Assisting with Motion Practice

L. Wilgis

Preparing initial pleadings
Requesting temporary relief
Preparing for the temporary orders hearing
Preparing the temporary orders

Obtaining and Evaluating Financial Information

T. DeVallance

K. Kasin

Identifying relevant information on assets, debts, income and expenses
Obtaining financial information
Using financial information questionnaires
Using interrogatories, requests for production, deposition testimony, private investigators
Valuing assets
Evaluating the information you have obtained
Working with accountants and financial experts
Preparing financial statements

Working With Divorce Clients and Opposing Counsel

D. Sydney

Establishing and maintaining good communication with clients
Methods of communication and contents of communications
Guidelines for responding to client communications
Working with difficult clients
Working with the courts and opposing counsel
Maintaining professionalism

Assisting with Alternative Dispute Resolution

B. Tollefson

Assisting in family law mediation
Understanding and assisting in parenting plan mediation
Assisting in the child support arbitration and mediation

Handling Ethical Issues in Family Law Practice

R. Rolfe

Complying with rules of professional responsibility and ethics guidelines for attorneys and paralegals
Avoiding conflicts of interest
Maintaining client confidentiality
Avoiding the unauthorized practice of law
Working with the secretive or dishonest client
Handling allegations of abuse or neglect
Zealous (vs. over-zealous) representation
Fee agreements, retainers, and collection of unpaid fees

Washington Family Law Practice for Paralegals and LLLTs

Seattle, WA - Thursday, October 31, 2019



HalfMoon Education Inc.
PO Box 278
Altoona, WI 54720-0278

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Learning Objectives

You'll be able to:

Learn about assisting with family law case intake.

Prepare pleadings and assist with motion practice.

Obtain and **evaluate** financial information.

Work with divorce clients and opposing counsel.

Assist with alternative dispute resolution and handle ethical issues in family law practice.



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Continuing Education Credits

Paralegals

6.5 Washington CLE Hours (1.0 Ethics)
6.5 NFPA CLE Hours (1.0 Ethics)
6.5 NALA CLE Hours (1.0 Ethics)

Washington LLLTs

6.5 WSBA CLE Hours (1.0 Ethics)



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Faculty

Linda Wilgis *Integrative Family Law, PLLC*
Ms. Wilgis is a passionate advocate for her clients, representing children and families for over 25 years as an attorney in private practice, as a former Assistant Attorney General, and as a family and children’s Ombudsman for the State of Washington. Ms. Wilgis is committed to helping clients navigate difficult transitions in their lives through compassionate advice and skilled advocacy, both through negotiation and litigation.

Todd DeVallance *Tsai Law Company, PLLC*
Mr. DeVallance is the managing partner with Tsai Law Company, PLLC. He focuses his practice on complex family law matters, which include high asset dissolutions; cases involving business owners, partners, and shareholders; division of restricted stock units and tax deferred accounts; drafting of prenuptial and postnuptial agreements; and mediating family law matters. He is a frequent speaker at CLEs and seminars on the topic of tax consequences associated with divorce. Mr. DeVallance has appeared on *The Today Show*, Fox News *Fox & Friends*, *ABC News*, and *Anderson Cooper*, and he has provided legal analysis on national high-profile cases. He is licensed to practice before the United States Tax Court and the United States Supreme Court. Mr. DeVallance earned his B.S. degree, *magna cum laude*, from Chaminade University, his J.D. degree from Gonzaga University School of Law, and his LL.M. degree in Taxation from the University of Washington School of Law.

Kimberly Kasin *Tsai Law Company, PLLC*
Ms. Kasin is a senior associate attorney with Tsai Law Company, PLLC. Ms. Kasin dedicates her practice to family law, primarily in the areas of dissolution, child custody and support matters, and collaborative law. She has been recognized by her peers and was named a “Rising Star” by *Super Lawyers*. Ms. Kasin is a King County Neighborhood Clinic volunteer attorney where she provides consultations for individuals who are in need of family law legal services. Ms. Kasin formally served on the Board of Directors of Youth Eastside Services. She earned her B.A. degree in Business Finance from the University of Washington, and she earned her J.D. degree from Seattle University School of Law.

Seminar Information

Executive Inn 200 Taylor Avenue N. Seattle, WA 98109 (206) 448-9444	Registration 8:00 - 8:30 am Morning Session 8:30 am - 12:00 pm Lunch (On your own) 12:00 - 1:00 pm Afternoon Session 1:00 - 4:30 pm
Tuition \$289 for individual registration \$269 for three or more registrants from the same company at the same time.	
Included with your registration: <i>Complimentary continental breakfast and printed seminar manual.</i>	
Receive a reduced tuition rate of \$101 by registering to be our on-site coordinator for the day. For availability and job description, please visit www.halfmoonseminars.org .	

How to Register

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- Mail-in or fax the attached form to 715-835-6066
- Call customer service at 715-835-5900

Cancellations: Cancel at least 48 hours before the start of the seminar, and receive a full tuition refund, minus a \$39 service charge for each registrant. Cancellations within 48 hours will receive a credit toward another seminar or the self-study package. You may also send another person to take your place.

Dawn Sydney *Law Offices of Dawn Sydney, PLLC*
Ms. Sydney received her law degree from Washington University School of Law (St. Louis) in 1991. She has been licensed to practice law in the state of Washington since 2011. She was first introduced to Washington State family law as a paralegal with Skellenger Bender. Ms. Sydney started her own firm in September 2017. Prior to opening the Law Offices of Dawn Sydney, PLLC, Ms. Sydney was a family law attorney with Bucklin Evens, PLLC, on Mercer Island and the Law Offices of Michael W. Bugni & Associates in Seattle.

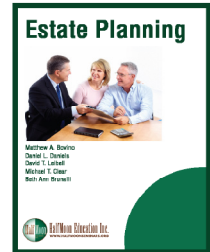
Brian Tollefson *Black Robe Dispute Resolution Services, PLLC*
Mr. Tollefson is a principal at Black Robe Dispute Resolution Services, PLLC. He also serves as a pro-tem judge for Pierce County Superior Court. Previously, he served as a judge for Pierce County Superior Court for more than 27 years. During his time on Superior Court, he was on the Executive Committee, served as presiding judge, and participated on a number of local Superior Court committees. He served on several committees in the Washington State Superior Court Judges Association and as a trustee on the Association’s board of trustees for five years.

Rhea J. Rolfe *Gilson-Moreau & Associates, P.S.*
Ms. Rhea J. Rolfe has been practicing law for over 35 years, primarily as a private solo practitioner. She has taught college-level law-related courses, including Women and the Law, Business Law, and Women of Color in America, and she has been a featured speaker for continuing legal education seminars. She has been an investigator for human rights agencies, and the Washington State Bar Association. Ms. Rolfe has been an arbitrator, mediator, and guardian ad litem for the courts, and a hearing examiner for the City of Seattle Civil Service Commission. She currently focuses her practice on family law, with a specialty in interstate and international custody and abduction issues (UCCJEA and Hague Convention). Ms. Rolfe was an editor for the WSBA *Family Law Deskbook*, and is on the YWCA Pathways for Women Displaced Homemakers’ Advisory Board, Operation Lookout Advisory Board, and the Washington Blues Society Board of Directors.

Estate Planning Manual

Included with each registration and written for HalfMoon Education Inc. by Matthew A. Bovino, Daniel L. Daniels, David T. Leibell, Michael T. Clear, and Beth Ann Brunalli.

In this comprehensive, 200+ page manual you’ll learn about federal tax law, estate planning, retirement asset planning, asset protection planning, charitable planning, and much more.



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Registration

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		Email address is required for credit card receipt, program changes, and notification of upcoming seminars and products. Your email will not be sold or transferred. () I need special accommodations. Please contact me.

Tuition () I will be attending the live seminar. Single Registrant - \$289.00 . Three or more registrants from the same company registering at the same time - \$269.00 each. () I am not attending. Please send me the self-study package: <input type="checkbox"/> Downloadable MP3 Audio/PDF Manual for \$269.00 . <input type="checkbox"/> CD/Manual Package for \$289.00 . (S&H included. Please allow five weeks from seminar date for delivery)
Checks: Make payable to HalfMoon Education Inc.
Credit Card: <i>Mastercard, Visa, American Express, or Discover</i> Credit Card Number: _____ Expiration Date: _____ CVV2 Code: _____ Cardholder Name: _____ Billing Address: _____ City: _____ State: _____ Zip: _____ Signature: _____ Email: _____