

# Agenda

**Assisting with Family Law Case Intake** *J. Cohen*

- Performing conflicts checks
- Assisting with initial client interview
- Preparing engagement letter, opening file
- Collecting information

**Preparing Pleadings and Assisting with Motion Practice** *J. Cohen*

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

**Obtaining and Evaluating Financial Information** *L. Canales*

- 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

**Assisting with Child Custody and Visitation Issues** *M. Lowry*

- Current status of custody law in Texas
- Obtaining relevant information
  - Client interview, custody questionnaires, authorizations for disclosure, using formal discovery
- Working with guardian-ad-litem
- Working with experts
- Drafting and reviewing parenting plans

**Enforcing and Modifying Family Law Orders and Decrees** *M. Wise*

- Implementing divorce decrees and orders
  - Preparing and filing the decree
  - Preparing other necessary documents
  - Enforcing judgments and orders
- Modifying decrees and orders
  - Determining which parts of a decree or order are subject to modification, deciding when to seek modification
- Assisting in modification actions

**Handling Ethical Issues in Family Law Practice** *A. Kennedy*

- 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

## Texas Family Law Practice for Paralegals

Houston, TX - Tuesday, January 21, 2020



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## Learning Objectives

**You'll be able to:**

**Assist** with initial client interviews, conflicts checks and client intake.

**Work** on preparing family law pleadings and on preparing for temporary orders hearings.

**Obtain** and **evaluate** financial information, work on valuing assets, and work on financial issues with accountants and other financial experts.

**Assist** with child custody and visitation issues, and work on parenting plans.

**Handle** ethical issues in family law and avoid the unauthorized practice of law.



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# Texas Family Law Practice for Paralegals

Houston, TX - Tuesday, January 21, 2020



**Learn** about assisting with family law case intake

**Prepare** pleadings and assist with motion practice

**Obtain** and evaluate financial information

**Assist** with child custody and visitation issues

**Learn** about modification of family law orders and handling ethical issues in family law practice

**Continuing Education Credits**

**Texas Certified Paralegals**  
6.5 Family Law Hours  
6.5 Civil Trial Law Hours

**NALA & NFPA**  
6.5 CLE Hours (1.0 Ethics)



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Faculty

**Jacob D. Cohen** *Associate Attorney with The Rainwater Firm in Houston*  
Mr. Cohen has been practicing family law in Texas since graduating from South Texas College of Law in 2011. He joined the Law Office of Robert S. Hoffman, P.L.L.C., in September of 2013 as an associate and spent over four years working on cases with complex property issues and highly contentious child custody matters. During his time with Mr. Hoffman, he sat second chair in jury trials and binding arbitrations. He attended, defended and took numerous depositions, and he represented clients at mediations and ancillary hearings. In February of 2018, Mr. Cohen joined the newly created Rainwater Firm. His strengths include advocating the best interests of children and working on cases with complex property issues and highly contentious child custody matters. Mr. Cohen is a native Houstonian, a seventh-generation Texan, and a second-generation Harris County family law attorney.

**Loren Canales** *Associate attorney at Schlanger Silver LLP in Houston*  
A native Houstonian, Ms. Canales earned her B.A. degree in Philosophy from the University of Texas at Austin in December 2012. After graduating, she attended South Texas College of Law while also working for a small family law firm in Pearland, Texas. During law school, Ms. Canales gained practice-ready skills in both the Family Law Advanced Clinic and Domestic Violence Clinic. She is a second-generation family law attorney and grew up wanting to help people navigate what is often the most difficult time of their lives. After being admitted to practice law in November 2016, Ms. Canales began her legal career at Burgower Law, LLP in January 2017 and remained there until joining Schlanger Silver LLP in January 2020. She handles a variety of family law matters including adoptions, divorces, child custody disputes, enforcements, marital agreements, and modification actions..

**Maria S. Lowry** *Attorney with Law Office of Maria Lowry PLLC in Houston*  
Ms. Lowry represents clients in transition or planning for life changes. Many of these are family law matters, focusing on pre-nuptial agreements, post-nuptial agreements, divorce, adoptions, child custody and support, and modifications of custody and support orders. A portion of her practice is also devoted the preparation of wills, powers of attorney, and advance directives, as well as assisting clients in probate administration or obtaining guardianship of incapacitated relatives. Ms. Lowry

completed her undergraduate education at the University of Texas at Austin, and she earned her law degree from the University of Houston Law Center. She is a member of the State Bar of Texas and is a 2020 director of the Family Law Section of the Houston Bar Association. Ms. Lowry also contributes her time and talent to the Houston Volunteer Lawyers Program and Fort Bend Lawyers Care, which provide legal services to low-income citizens. Prior to becoming an attorney, Ms. Lowry was a classroom teacher for several years. Her experience and training working with children, as well as her ability to understand their needs, add depth and insight to her work with families going through difficult times.

**Mari L. Wise** *Attorney with The Wise Law Firm in Houston*  
Ms. Wise is a board certified family law attorney practicing family law in Harris County, Fort Bend County, Montgomery County, Waller County, Brazoria County and surrounding counties. Most frequently, she serves clients in Houston, Katy, Sugarland, Richmond, and throughout the surrounding areas. Ms. Wise helps clients in all divorce and family law related matters, including child custody and child support, spousal maintenance, property division, post-divorce modifications and appeals. She also assists clients in other areas of family law, such as adoptions and paternity proceedings. Ms. Wise was admitted to the practice of law in Texas in 2000 and was admitted to the United State District Court for the Southern District of Texas in 2004. She completed her undergraduate studies at the University of Texas at Austin with honors, majoring in Psychology, and she earned her J.D. degree from South Texas College of Law in Houston. Ms. Wise is a member of the State Bar of Texas, State Bar of Texas Family Law Division, College of the State Bar of Texas, the Houston Bar Association and Houston Bar Association Family Law Division, as well as the Fort Bend County Bar Association.

**Anne E. Kennedy** *Attorney At Law in Houston*  
Ms. Kennedy was born and raised in Houston. She graduated from Rice University in 1997. She received her law degree from the University of Kentucky in 2002. She was licensed to practice law in Texas in 2002 and Louisiana in 2005. In 2006, Ms. Kennedy opened her own law office, providing legal advice to a variety of clients. The main areas of her legal practice are family law and immigration. Ms. Kennedy is a certified mediator in general civil and family law. She is a member of the Better Business Bureau and the American Immigration Lawyer’s Association.

Seminar Information

**Crowne Plaza Houston Galleria Area**  
7611 Katy Freeway  
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(713) 680-2222

**Tuition**  
**\$289** for individual registration  
**\$269** for three or more registrants from the same company at the same time.

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• Visit us online at [www.halfmoonseminars.org](http://www.halfmoonseminars.org)  
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**Continuing Education Credit Information**  
This seminar is open to the public and has been approved by the Texas Board of Legal Specialization for 6.5 CLE hours for certified paralegals in the areas of Family Law and Civil Trial Law.  
  
The National Association of Legal Assistants and the National Federation of Paralegal Associations have each approved this program for 6.5 CLE hours, including 1.0 ethics hour.  
  
Attendance will be monitored, and attendance certificates will be available after the seminar for most individuals who complete the entire event. Attendance certificates not available at the seminar will be mailed to participants within fifteen business days.

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Audio recordings of this seminar are available for purchase starting at \$269. See registration panel for more information and please refer to specific state licensing rules or certification requirements to determine if this learning method is eligible for continuing education credit.

Additional Learning

**Discovery and Evidence for Paralegals**  
*Houston, TX - Wednesday, December 18, 2019*

- *Learn* to comply with the rules of professional conduct and ethics during litigation
- *Understand* what evidence is admissible and what is not
- *Discuss* assisting with formal discovery
- *Learn* the difference between eDiscovery and forensics
- *Discuss* records management and litigation

**Presented by:**  
Jonathon Hance  
*Partner, Bracewell LLP, Law Firm, Houston, TX*

Margie Putman  
*CP, NCPM, Putman, LLC, Sugar Land, Texas*

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Registration  
Texas Family Law Practice for Paralegals

Houston, TX - Tuesday, January 21, 2020

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<b>Complete the entire form.</b> Attach duplicates if necessary.		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
( ) <b>I will be attending the live seminar.</b> Single Registrant - <b>\$289.00</b> . Three or more registrants from the same company registering at the same time - <b>\$269.00</b> each.
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