

Agenda

Basics of Law Office Management and Operation in Michigan *S. Bowman*

- Law office organization
- Staff roles and responsibilities
- Awareness of attorney regulation and ethics rules
- Managing contacts with potential clients and other law firms
- Participating in client intake process
- Creating, organizing and maintaining files
- Client communications
- Client billing and accounting practices

Locating Sources of Michigan Law *S. Bowman*

- Sources of Federal laws and regulations
- Sources of Michigan laws and regulations
- Finding case law
- Using secondary sources
- Evaluating sources and information obtained

Legal Ethics for Law Practice Management *T. Wernette*

- Attorney and paralegal ethical rules
- Specific areas of concern for legal support staff:
 - Conflicts of interest
 - Confidentiality
 - Ex-parte communications
- Avoiding the unauthorized practice of law
- Working with clients, courts and opposing counsel

Basics of Michigan State Civil Litigation *J. Savaya*

- Types of civil matters
- State court vs. federal court practice
- Prerequisites for litigation
- Alternatives to litigation: mediation, arbitration, negotiation
- The civil discovery process
- Preparing for trial
- Civil trials
- Post-judgment matters and appeals

Document Drafting and Editing *J. Savaya*

- Legal terminology
- Drafting legal documents
- Editing legal documents
- Updating legal references
- Proofreading skills

Can't Attend? Order the Webinar as an On-Demand Package!

Recordings of this webinar are available for purchase. See course listing online 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.

Fundamentals of Legal Assisting in Michigan

Live, Interactive Webinar - Thursday, February 1, 2024

NON-PROFIT
U.S. POSTAGE PAID
EAU CLAIRE, WI
PERMIT NO. 2016

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



Learning Objectives

You'll be able to:

- Manage** contacts with potential clients, current clients, and other law firms.
- Find** federal and Michigan statutes, regulations and case law.
- Review** ethics rules for attorneys and legal support staff and learn to avoid the unauthorized practice of law.
- Discuss** civil litigation practice and consider alternatives to litigation.
- Get** tips on document drafting, editing and proofreading.



HalfMoon Education Live Webinars

Fundamentals of Legal Assisting in Michigan

Live, Interactive Webinar - Thursday, February 1, 2024



- Explore** law office organization and standard practices
- Learn** to locate federal and Michigan laws and regulations
- Understand** the principles underlying ethics rules for attorneys and legal assistants
- Discuss** the basics of civil litigation in Michigan
- Get** tips on drafting documents

Continuing Education Credits

- Paralegals**
 - 6.5 CLE Hours (Incl. 1.0 Ethics Hour)
- National Association of Legal Assistants (NALA)**
 - 6.5 Total CLE Hours
 - 4.0 Substantive CLE Hours
 - 1.5 Non-substantive CLE Hour
 - 1.0 Ethics CLE Hour
- National Federation of Paralegal Associations (NFPA)**
 - 6.5 Total CLE Credits
 - 5.5 General CLE Credits
 - 1.0 Ethics CLE Credit



Webinar Information

Log into Webinar 8:00 - 8:30 am EST	Break 12:15 - 12:45 pm EST
Morning Session 8:30 am - 12:15 pm EST	Afternoon Session 12:45 - 4:00 pm EST

Tuition
\$319 for individual registration.
\$289 for two or more registrants from the same company at the same time.
Included with your registration: PDF seminar manual.

How to Register

- Visit us online at www.halfmoonseminars.org
- Call customer service at 715-835-5900

Webinars are presented via GoToWebinar. Instructions and login information will be provided in an email sent close to the date of the webinar. For more information, please visit our FAQ section of our website, or visit www.gotowebinar.com.

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

Learn More and Register:
www.halfmoonseminars.org
Customer Service (715) 835-5900 Ext. 1

or scan here



Can't Attend? Order the Webinar as an On-Demand Package!
Recordings of this webinar are available for purchase. See details online 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.

Faculty

Sara Bowman Paralegal Program Director, Oakland Community College
Ms. Bowman was born and raised in Farmington Hills, Michigan attending Farmington public schools. She next attended New York University and obtained a bachelor's degree. Upon returning to Farmington, she took classes at Oakland University, earning a post-bachelor Certificate in Paralegal Studies. After spending several years working in various practice areas, Ms. Bowman ultimately landed with the regional insurance defense firm Kopka Pinkus Dolin in 2005. Over her 18-year career with KPD, she transitioned from trial paralegal to Litigation Manager, and was ultimately the legal operations manager in which she oversaw three Michigan offices and managed 70 direct reports. Ms. Bowman began the next phase of her career in January 2023 where she now serves as the program director of Paralegal Studies at Oakland Community College. She served on the Farmington Planning Commission from 2008-2015 before being elected to the Farmington City Council in 2015. She served as mayor on the Council from 2019-2023. Ms. Bowman lives in Farmington with her husband of 23 years. They share a love of motorcycles, golf and travel. Their son is an explosive ordnance disposal technician in the United States Navy.

Tonia D. Wernette is director of the Paralegal Program at Oakland University in Rochester, Michigan, and teaches Ethics and Law Practice Management. Ms. Wernette is a dedicated public servant and educator with 30+ years of experience, including leadership roles in various settings. This includes positions as a middle school English and history teacher, manager for a multi-location healthcare company and paralegal at private law firms and Oakland Schools ISD supporting the legal needs of 28 school districts. Ms. Wernette has a bachelor's degree in English from Oakland University and an ABA paralegal certificate from Oakland Community College.

Janel Savaya *Litigation Manager with Seva Law Firm*
Born and raised in the suburbs of Detroit, Ms. Savaya has always had a passion for helping others. She attended Oakland Community College where she received her degree in Paralegal Studies in 2011. Shortly after, she began working in the legal field. Ms. Savaya has over 10 years of experience and knowledge working in civil litigation, criminal and traffic law, corporate transactional work, and Michigan no-fault litigation. She is hard-working, dedicated, and has a keen sense for organization. Ms. Savaya is committed to providing excellence both in and out of the workplace and loves what she does. She joined the Seva Law Firm in July 2016 with a primary focus on no-fault and bodily injury litigation. Ms. Savaya is the litigation manager at the Seva Law Firm, and in that role, she not only handles a full docket of cases, but also trains and teaches other paralegals how to handle their own dockets. On a given day, she will manage the firm's calendar and docket, resolve most motions for the entire firm, and communicate with clients and defense attorneys. In addition, she manages all appeals, reviews court transcripts, and prepares all appellate court filings. Ms. Savaya also handles all paralegal assistance for trials. She is also a leader in the MAJ paralegal association and is active in many other paralegal associations. Ms. Savaya has hosted lectures at paralegal seminars. She is on the advisory board for the Macomb Community College Paralegal Program, and she is the vice chair for the Oakland County Bar Association paralegal committee.

Credit Information

This webinar is open to the public and is designed to qualify for 6.0 CLE hours for paralegals in Michigan. Paralegal certification is not required to participate in this webinar.

The National Association of Legal Assistants (NALA) has approved this course for 6.5 total CLE hours, which includes 4.5 substantive CLE hours, 1.0 non-substantive CLE hour, and 1.0 legal ethics CLE hour.

The National Federation of Paralegal Associations (NFPA) has approved this course for 6.5 total CLE credits, which includes 5.5 general CLE credits and 1.0 ethics CLE credit.

Attendance will be monitored, and attendance certificates will be available after the webinar for those who attend the entire course and score a minimum 80% on the quiz that follows the course (multiple attempts allowed).

On-Demand Credits
The preceding credit information only applies to the live presentation. This course in an on-demand format may not be eligible for the same credits as the live presentation; please consult your licensing board(s) to ensure that a structured, asynchronous learning format is appropriate.