

Agenda

Client Counseling and Interview Techniques	<i>A. Conley</i>
Overview of a Civil Trial Pre-trial procedure and scheduling orders Discovery control plan and discovery overview Pre-trial motion practice Anatomy of a trial	<i>J. Lervick</i>
Managing Evidence Types of evidence Rules for admissibility of evidence Preserving evidence	<i>R. Tappan</i>
Effectively Working with Opposing Counsel and Staff Analyzing methods of communication Standards for responding to emails Working with the courts Maintaining professionalism	<i>A. Fox</i>
Assembling and Using Trial Notebooks Essentials of a trial notebook Organization of a trial notebook Uses for a trial notebook before trial Uses of a trial notebook during trial	<i>B. Frederickson</i>
Litigation Ethics for Assistants and Paralegals Attorney and paralegal ethical rules Specific areas of concern for legal support staff <ul style="list-style-type: none">• Conflicts of interest• Confidentiality• Ex-parte communications Avoiding the unauthorized practice of law Working with clients, courts and opposing counsel	<i>B. Frederickson</i>



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Trial Preparation for Montana Legal Assistants

Live, Interactive Webinar - Tuesday, October 29, 2024

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Learning Objectives

- You'll be able to:**
- Learn** client counseling and interview techniques.
 - Explore** Montana civil procedure from discovery to trial.
 - Work** effectively with opposing counsel and with court personnel.
 - Identify** types of evidence and discuss rules for admissibility.
 - Assemble** and use trial notebooks before and during trial.
 - Comply** with ethics rules for attorneys and paralegals.



HalfMoon Education Inc., Your LIVE Education Leader Presents Trial Preparation for Montana Legal Assistants

Live, Interactive Webinar - Tuesday, October 29, 2024



- Learn** client counseling and interview techniques
- Discuss** the anatomy of a Montana civil trial
- Learn** techniques for managing evidence
- Work** effectively with opposing counsel and court staff
- Assemble** and use trial notebooks
- Handle** ethical issues that can arise during litigation

Continuing Education Credits

- Paralegals**
6.0 CLE Hours (Incl. 1.0 Ethics Hour)
- National Federation of Paralegal Associations (NFPA)**
6.0 CLE Credits (Incl. 1.0 Ethics Credit)



Webinar Information

Online - Tuesday, October 29, 2024

Log into Webinar 8:30 - 9:00 am MDT	Break 12:15 - 12:45 pm MDT
Morning Session 9:00 am - 12:15 pm MDT	Afternoon Session 12:45 - 4:00 pm MDT

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Faculty

Anna Conley is an assistant professor at the Alexander Blewett III School of Law. Her areas of expertise include civil litigation, comparative law, international law, and human rights. Professor Conley has a J.D. degree from the George Washington Law School, and an LL.M. and doctor of Civil Laws degree (D.C.L.) from the McGill University Faculty of Law. She has litigated many large-scale complex cases, participated in several rule of law initiatives, and published extensively in international and comparative law. Professor Conley was an adjunct professor at the University of Montana Department of Political Science teaching Constitutional Law, International Law and Comparative Law from 2017 to 2021. She also was an adjunct professor at the Alexander Blewett III School of Law teaching Global Perspectives on Law and Public International Law from 2007 to 2016. Professor Conley has taught various classes at the Montana Osher Life Long Learning Institute (MOLLI), including International Law: Foundations and Current Challenges, Judicial Power: A Historical, Comparative and Functional Inquiry; Incarceration in Montana; International Law; and Legal Traditions of the World.

Jeana Lervick is a seasoned litigator with Crowley Fleck in Billings who specializes in counseling and defense through every step of conflict prevention and resolution. She particularly focuses on supporting clients in the health care, employment, and local and state government sectors. Ms. Lervick has extensive experience in intellectual property, including both trademarks and patents, as well as the inner workings of local and state government, private businesses, school districts, a variety of health care providers. She litigated and prosecuted patents and trademarks for several years in Chicago, before returning home to Billings to raise her family. For the next decade, Ms. Lervick managed some of Montana's largest work forces as human resources executive director and in-house counsel, as well as chief of the civil department of Montana's largest county. At Crowley Fleck, her extensive real-world experiences have served her in counseling and defending clients large and small. She handles all aspects of employment management and defense, including contract negotiation and drafting, as well as appearing regularly in administrative proceedings before the Human Rights Bureau. Ms. Lervick is licensed in Illinois and Montana and is registered before a wide array of appellate and administrative courts and bodies across the U.S. She obtained her bachelor of science degree from the honors program at Montana State University and her juris doctor degree from DePaul University College of Law in Chicago.

Rick C. Tappan practices with Tappan Law Firm, PLLC, in Helena. He represents numerous clients from individual landowners with single-issue property disputes to large businesses with complex permitting and land-use demands. Mr. Tappan is admitted to practice before all Montana Courts, the United States District Court for the District of Montana, and the United States Ninth Circuit Court of Appeals. He practiced as an environmental consultant and professional geologist prior to practicing law. Mr. Tappan's main areas of practice include commercial litigation, property litigation, natural resource litigation, private and public lands issues and water law. He graduated from Gonzaga University School of Law with honors and was a member of the *Gonzaga Journal of International Law*. Mr. Tappan received his undergraduate degree in Geology from Northern Arizona University and practiced environmental consulting as a professional geologist before attending Gonzaga.

Andrea Fox is the owner of Fox Law Firm in Kalispell. She is an experienced Montana family law attorney, and has pioneered the only flat fee model family law practice in the state, specializing in divorces, child custody disputes, and working with domestic violence shelters. Ms. Fox has been a member of the Montana State Bar since 2011. She earned her undergraduate degree from the University of Montana, Missoula, and her J.D. degree from the University of Montana School of Law.

Bruce A. Fredrickson is an attorney with Rocky Mountain Law Partners in Kalispell. His legal experience spans over three decades and he has tried many cases, both jury and non-jury. Mr. Fredrickson is also a pharmacist and practiced in that profession for a number of years before entering the practice of law. His current practice focuses on all aspects of commercial, business, real estate and general civil litigation. He is also available for mediation and arbitration services. His experience and knowledge base is very broad. In addition to complex commercial contract and tort litigation, Mr. Fredrickson is also experienced in the areas of employment law, natural resources litigation, lender liability litigation, chemical and drug product liability litigation, pharmacy law issues and intellectual property litigation. He has served as lead trial counsel in all of those practice areas. Mr. Fredrickson has also served as lead counsel and has been admitted pro hac vice in cases in Wyoming, Colorado, Texas and California. He is admitted to practice law before all courts in Montana and North Dakota; the United States District Courts for the Districts of Montana, North Dakota and Colorado; the United States Court of Appeals for the Eighth and Ninth Circuit and the United States Supreme Court.

Credit Information

This webinar is open to the public and is designed to qualify for 6.0 CLE hours, including 1.0 ethics CLE hour, to paralegals and legal assistants in Montana. Paralegal certification is not required to participate in this course.

The National Federation of Paralegal Associations (NFPA) has approved this webinar for 6.0 total CLE credits which includes 5.0 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).

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