



Photos Provided by PCVB

# ABA Section of Family Law FALL CLE CONFERENCE

Four Seasons Hotel Philadelphia  
Philadelphia, PA  
October 10-13, 2012















TOP 10



## REASONS TO COME TO PHILADELPHIA

### FOR THE 2012 FALL CLE CONFERENCE

-  Liberty Bell
-  Philly Cheesesteaks
-  Barnes Museum
-  Run the Stairs like Rocky
-  Tastykakes
-  Great Colleagues
-  Lions vs. Eagles (Sunday, October 14)
-  Shane Confectionery
-  Fantastic CLE
-  Birthplace of Freedom and American Bandstand

#### SECTION CHAIR

Maryann Foley, Anchorage, AK

#### CLE COMMITTEE CO-CHAIRS

Melissa Avery, Indianapolis, IN  
Peter Walzer, Woodland Hills, CA

#### HOST COMMITTEE MEMBERS

David Hofstein, Co-Chair  
Mary Vidas, Co-Chair  
Lynne Gold-Bikin  
Lewis Becker  
Richard DeMichelle

# CONFERENCE SPONSORS

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# GENERAL INFORMATION

## AIRLINE ARRANGEMENTS

Discounted fares are available from ABA Orbitz for Business; take advantage of ABA-negotiated discounts on American, United and Virgin America Airlines. To book online, go to [www.americanbar.org/travel](http://www.americanbar.org/travel), then click the Orbitz for Business logo. Discounts can also be obtained directly from the carrier. American: Call 800.433.1790 code A7112TT; United: Call 800.426.1122, agreement code 648816 and z code ZMVB; Virgin America: Use promo code VXABA online at [www.virginamerica.com](http://www.virginamerica.com). The American Airlines discount code is not valid on their website; all other discounts are available online via the ABA Orbitz for Business site. For assistance with reservations, call toll free 877.222.4185.

## NEARBY AIRPORTS & TRANSPORTATION

Philadelphia is served by most major airlines through the Philadelphia International Airport (PHL). The airport is approximately ten miles (25 minutes) from the hotel. A taxi ride is estimated to cost \$35 one way.

## ROOM RESERVATIONS & HOTEL INFORMATION

Accommodations will be provided by the Four Seasons Hotel Philadelphia. Reservations should be made directly with the Four Seasons Hotel Philadelphia by calling 215.963.1500 or 866.516.1100 prior to **Tuesday, September 18, 2012, 5:00 pm Central**. Be sure to mention that you are attending the ABA Family Law Fall CLE Conference in order to receive the discounted room rate of \$225 per night. The room rate of \$225 includes internet in the guest rooms. (Discounted rooms are subject to availability, so be sure to reserve early.)

Feel free to visit the hotel website at: [www.fourseasons.com/philadelphia](http://www.fourseasons.com/philadelphia).

## CONFERENCE REGISTRATION

The early bird registration fee, postmarked by August 31, is \$465 for ABA Section of Family Law members. This fee covers all CLE programs, access to downloadable materials prior to the conference, breakfast each day, the networking reception on Wednesday evening, and the Chair's Suite receptions on Wednesday, Thursday, and Saturday evenings. Registration increases to \$540 after August 31.

The non-lawyer spouse or guest registration fee is \$135. This registration fee allows your guest to attend the morning breakfasts and the non-ticketed evening receptions. All attendees, including guests, will be required to wear a name badge to all events. Registration fees for children 12 and under are complimentary; however, tickets must be purchased for all children over the age of four who plan to attend ticketed events.

We encourage participation by all individuals. If you are a person with a disability, giving us advance notification of any special needs will help us accommodate you better.

## CANCELLATION POLICY

To receive a full refund, minus a \$50 administrative fee, a written request must be received on or before **September 3, 2012**. No refunds will be issued after that date. Event tickets are non-refundable. Questions about cancellations can be directed to Section staff at 312.988.5145.

## TUITION ASSISTANCE

A limited number of scholarships to defray registration fees may be available for government employees, public interest lawyers employed with nonprofits, academics and law students, as well as unemployed attorneys. To apply, send a letter outlining the basis for your fee waiver request to: [familylaw@americanbar.org](mailto:familylaw@americanbar.org). All requests must be received by **August 22, 2012**.

## OBTAINING CLE CREDIT

CLE credit has been requested from MCLE states. Those seeking credit in Pennsylvania and Louisiana must submit a certificate and pay fees to those states. The ABA pays applicable fees in other states. Each state has its own rules and regulations, including its definition of CLE. You may wish to check with your state for confirmation of a program's approval. Many states require a Uniform Certificate of Attendance; these certificates, as well as the sign-in sheets, will be available on-site in the back of each CLE program room. You must sign in ONCE throughout the entire conference to receive credit.

## MEETING MATERIALS

Conference materials will be disseminated via email to all registrants prior to the conference. **Please be sure you have an email address on file with the ABA or one is indicated on your registration form.**

If you are unable to attend the conference, but would like to purchase course materials and/or audiotapes, please check the Section's website approximately three weeks after the conference for more information: [www.ambar.org/famlawevents](http://www.ambar.org/famlawevents) (click on "Past Event Info & Materials").

## SECTION OF FAMILY LAW BOOKS AVAILABLE



While at the conference, please visit the Section of Family Law book table in the Hospitality Room to take advantage of special meeting discounts on Family Law publications. Section of Family Law books can also be purchased online at the ABA Web Store at [www.shopaba.org](http://www.shopaba.org).

**Four Seasons Hotel Philadelphia**  
**One Logan Square**  
**Philadelphia, PA 19103-6933**  
**215.963.1500**

## HOLIDAY HAPPINESS FOR A CHILD

Please help the Section donate 200 new toys to the **Philadelphia Marines Toys for Tots**. Donations can be dropped off during Hospitality Room hours through Friday and will be presented during the *American Bandstand* event. If you're unable to attend, please send your toys to: Blank Rome LLP, c/o Mary Vidas, One Logan Square, Philadelphia, PA 19103-6998. If you have any questions, please contact Kendra Randall Jolivet at [Kendra@randallsonnier.com](mailto:Kendra@randallsonnier.com). Thank you for your support and participation!

## Wednesday October 10, 2012

8:00am-5:00pm

### Family Advocate Board of Editors Meeting

Boardroom 361

2:00-4:00pm

### Officers Meeting

Boardroom 461

4:00-5:00pm

### Finance Committee Meeting

Boardroom 461

5:00-6:30pm

### Registration & Welcome Reception

Ballroom Foyer

7:00pm

### Dine-Arounds

With tables reserved at some of the best eateries in Philadelphia, this fun "Dutch treat" event is an excellent opportunity to enjoy dinner at fabulous restaurants while networking with conference attendees. Sign up at the registration desk.

9:30-11:00pm

### Chair's Suite Reception

## Thursday October 11, 2012

7:00-11:30am

### Registration and Hospitality Room

Ballroom Foyer and Washington

7:00-9:30am

### Breakfast

Ballroom Foyer and Washington

7:15-8:00am

### Meeting of the Committee Chairs and Vice-Chairs

Ballroom South

7:30-8:15am

### Newcomers Meeting

Madison

New to the scene? First time attending? Come meet the Section leaders for an

informative overview of the conference and the Section of Family Law.

8:30-9:45am

### SIMULTANEOUS COMMITTEE CLE PROGRAMS

#### Self-Represented Litigants as Opposing Parties: What To Do, What To Do!

Adams

With the economic downturn, there has been an increase in self-represented/ pro se litigants, especially in the family law arena. Come listen and participate in a panel discussion regarding this upturn in self-represented litigants and its impact on the courts. Learn some practical ways to use alternative dispute resolution processes, including mediation, as a way to assist your client in obtaining a resolution when the opposing party is self-represented. Some ethical considerations when dealing with self-represented litigants will be explored as well.

**Moderator:** Cecilia Paizs, Esq.,  
Ellicott City, MD

**Speakers:** Honorable James Eyster,  
Annapolis, MD  
Honorable Holly Ford,  
Philadelphia, PA

#### A World of Trouble, A World of Divorce: Helping Clients in an International Divorce Case

Jefferson

Panelists will discuss creative strategies for international divorce, including a discussion of the impact of international divorce jurisdiction; international prenuptial and postnuptial agreements; the treatment of asset division and spousal maintenance laws and practices in different jurisdictions; and obtaining child support awards and enforcing them between jurisdictions.

**Moderator:** Kathryn Root, Esq.,  
Portland, OR

**Speakers:** Gary Caswell, Esq.,  
San Antonio, TX  
Jeremy Morley, Esq.,  
New York, NY

#### Keeping the Court Awake: How to Effectively Present Tax Evidence at Trial

Ballroom North

A lawyer's understanding of the various tax issues that arise in a matrimonial case is important. But how do you translate the evidence so that the court understands it and makes the decisions you want? And how do you present the evidence in a way that keeps the court's attention? This program will address some common (and not so common) tax issues confronted by a practitioner in a divorce case; how to find and use tax evidence; and how to present that evidence persuasively to the court.

**Moderator:** Michelle Piscopo, Esq.,  
Philadelphia, PA

**Speakers:** Livia DeFillipis Barndollar, Esq.,  
Westport, CT  
James Godbout, ASA, AVA,  
CDFE, CFE,  
Chicago, IL

9:00-10:00am

### Scope & Correlation Committee Meeting

Boardroom 703

9:00-11:00am

### Drafting Meeting for Third Party Access

Boardroom 361

9:50am

### Announcements

10:00-12:00pm

### PLENARY SESSION

Ballroom

#### Financial and Other Hot Tips from the Experts

A fast-paced seminar guaranteed to give practitioners valuable hot tips and/or practice pointers from experts in the field, including, but not limited to, forensic accountants, financial wealth managers, certified financial and divorce planners, private investigators, business valuers, and even a few lawyers!

**Moderator:** Cheryl Young, Esq.,  
Norristown, PA

**Speakers:** Mitchell Benson, CPA, MT, CFF,  
Savran Benson, LLP  
Anne Bucciarelli,  
Bernstein Global Wealth  
Management  
Gregory Cowhey,  
CBIZ, Inc.  
Joan Crain,  
BNY Mellon Wealth Management  
Sarinia Feinman, Esq.,  
King of Prussia, PA  
Joseph Gill,  
Gill & Associates  
Lynne Gold-Bikin, Esq.,  
Norristown, PA  
Nicholas Himonidis, Esq., CFE, CCFS  
T&M Protection Resources, LLC  
Lyman Hopper,  
Signature Information  
Solutions, LLC  
G. Daniel Jones,  
CBIZ, Inc.  
Charles Meyer, Esq.,  
Philadelphia, PA  
Brandon Park,  
UBS Financial Services  
Barbara Shapiro, CFP/CFS/CDFIA,  
HMS Financial  
Pamela Sloan, Esq.,  
New York, NY  
Jeffrey Williams, Esq.,  
Doylestown, PA



10:30-11:30am

**Member Benefit Development Committee Meeting**

Boardroom 703

12:15-1:30pm

**Committee Meetings and Working Lunch**

Swann Restaurant

Committee meetings are open to all Family Law Section members and allow you to learn more about a specific practice area. Committee membership is an excellent member benefit and a great way to meet other conference attendees while learning about committee activities. **Alimony, Alternative Families, Bankruptcy, Courts Dealing with Families, Custody, Ethics, LPM/Technology, Marital Property, Military, and Vulnerable Adults & Special Needs Families** Committees will meet today.

**Tickets:** \$35

5:00-6:30pm

**Networking Reception**

Ballroom Foyer

Please join us for hors d'oeuvres and drinks while getting to know your fellow attendees.

7:00pm

**Dine-Arounds**

With tables reserved at some of the best eateries in Philadelphia, this fun "Dutch treat" event is an excellent opportunity to enjoy dinner at fabulous restaurants while networking with conference attendees. Sign up at the registration desk.

7:00pm

**Newcomers Dinner**

Estia

1405 Locust Street

Join other newcomers and Section officers in an atmosphere reminiscent of a warm, inviting Mediterranean home.

**Tickets:** \$60

(Advance ticket purchase required.)

9:30-11:00pm

**Chair's Suite Reception**

**Friday**

**October 12, 2012**

7:30-11:30am

**Registration and Hospitality Room**

Ballroom Foyer and Washington

7:30-9:30am

**Breakfast**

Ballroom Foyer and Washington

8:00am-12:00pm

**Family Law Quarterly Meeting**

Jefferson

8:20am

**Announcements**

8:30am-12:00pm

**PLENARY SESSION**

Ballroom

**Everything You Wanted to Know but Were Afraid to Ask about...Ethics!**

This powerhouse ethics program will include a presentation by the ABA Ethics 20/20 Commission regarding model ethics rules, a rare discussion with malpractice defense counsel, and valuable insight from the bench on how to make ethics and civility go hand in hand.

**Moderator:** David Hofstein, Esq., Philadelphia, PA

**Speakers:** Professor Stephen Gillers, New York, NY  
Honorable Marie Lihotz, Trenton, NJ  
William O'Connor, Jr., Esq., Morristown, NJ  
Honorable Katherine Platt, West Chester, PA  
Thomas Wilkinson, Jr., Esq., Philadelphia, PA

**ART TRACK PROGRAMS\***

8:30-9:45am

**Surrogacy and Employment Law: When It's Not Your Pregnancy, Is It Your Leave of Absence?**

Monroe

Medical science has split genetic motherhood, gestational motherhood, and legal motherhood. This program will educate the audience as to how the law regarding leave of absence is applied where there can be argued to be multiple "mothers."

**Speakers:** Cynthia Fruchtmann, Esq., Santa Monica, CA  
Victoria Gelfand, Tel Aviv, Israel  
Colin Rogerson, Solicitor, London, England

10:00am-12:00pm

**The Hague Convention on Surrogacy: Should We Agree to Disagree?**

Monroe

The Hague is considering a new international convention to determine rules for and parentage in international surrogacy matters. This presentation will

educate the audience as to whether The Hague is the right entity to promulgate such regulations and if so, how it should do so.

**Speakers:** Bruce Hale, Chestnut Hill, MA  
Anne-Marie Hutchinson, Solicitor, London, England  
Mark Reder, Esq., Indianapolis, IN  
Professor Louise Ellen Teitz, The Hague, Netherlands

\* Assisted Reproductive Technologies

9:00-10:00am

**Diversity Committee Meeting**

Boardroom 361

10:30-11:30am

**Sponsorship and Fundraising Committee Meeting**

Boardroom 361

2:00-4:30pm

**Council Meeting**

Ballroom

Stop by the Section's Council Meeting to learn more about Section activities—all are welcome!

7:00-10:00pm

**American Bandstand Event**

Ballroom

Hip-Hopper? Greaser? Disco Queen? Shake your booty as FLS does *American Bandstand!* Wear casual clothes or your favorite dance era attire.

Toys donated for the **Philadelphia Marines Toys for Tots** will be presented to a representative at this event.

**Tickets:** Adults \$85 (prior to 8/31/12); Adults \$100 (after 8/31/12); Kids \$50 (ages 4-12) (Discounted ticket prices made possible by BNY Mellon.)

**Saturday**

**October 13, 2012**

7:00-11:30am

**Registration and Hospitality Room**

Ballroom Foyer and Washington

7:00-9:30am

**Breakfast**

Ballroom Foyer and Washington

7:30-8:30am

**Meeting of Past Chairs and Current Officers**

Madison

8:00am-12:00pm

## Publications Development Board Meeting

Boardroom 703

8:30-9:30am

## Bylaws Committee Meeting

Boardroom 803

8:30-9:45am

## SIMULTANEOUS COMMITTEE CLE PROGRAMS

### Valuation and Distribution of Non-Transferable Limited Partnership and Other Business Investment Entities and Interest

Ballroom North

This seminar will discuss why usual valuation methodologies do not always work when valuing limited partnership and other business investment entities and interests. Various distribution scenarios will be discussed when the business interest is non-transferable; sample distribution language for presentation to the court and/or inclusion in the marital settlement agreement will also be provided.

**Moderator:** James McGuire,  
Seattle, WA

**Speakers:** Stacy Collins, CPA/ABV, CFF,  
Bala Cynwyd, PA  
Sandra Klevan, CPA/ABV, CFF,  
Bala Cynwyd, PA  
Gerald Shoemaker, Esq.,  
Norristown, PA

### Divorce and Trusts: How to Effectively Represent Your Client

Jefferson

This program will cover complicated issues such as: whether assets held in trust can be considered marital property if they are subject to distribution; whether a spouse can be compelled to pay alimony or child support because they are the beneficiary of a trust; and whether a trust itself can be compelled to make the payments. When these issues arise in divorce, they can have a significant impact on the outcome of the matter. This program will give practitioners the necessary tools to conform the treatment of trusts in divorce.

**Moderator:** Joo Park, Esq.,  
Norristown, PA

**Speaker:** Jonathan Wolfe, Esq.,  
Livingston, NJ

### Unraveling the Mysteries of Social Security

Adams

Social Security benefits create issues in establishing the need for and amount of alimony and child support. It is important that practitioners understand the law in this area to advise their clients when a Social

Security issue arises and to plan ahead for the future. Find out the Social Security Act definition of who makes up a "family," who qualifies for benefits, the types of benefits, and the allocation of Social Security benefits in the family law context. Get a comparison of the credit rules and plan ahead for the impact of Social Security benefits in alimony and child support cases.

**Moderator:** Craig Treneff, Esq.,  
Westerville, OH

**Speakers:** Paula Kirby, Esq.,  
Scottsdale, AZ  
Laura Morgan, Esq.,  
Charlottesville, VA  
Kate Vetrano, Esq.,  
King of Prussia, PA

9:50am

## Announcements

10:00am-12:00pm

## PLENARY SESSION

Ballroom

### Extraordinary Issues for Extraordinary Kids—A Primer on the Financial Issues When Special Needs Children Are Involved in the Divorce

In part one of a two-part program discussing divorce cases involving children with special needs and special talents, the speakers will cover financial issues, such as how to evaluate a special needs case; quantifying, evaluating and illustrating special needs or opportunities; reviewing documents necessary for such cases; relevant terms and statutes; government benefits and outside funding sources available for special needs cases and the steps needed to preserve those benefits; health and life insurance, guardianship issues, and supplemental needs trusts. The second part of the program will take place at the Spring CLE conference in Anchorage, AK, and address parenting, custody, and time-sharing issues unique to children with special needs and special talents.

**Moderator:** Stephanie Brinkley, Esq.,  
Charleston, SC

**Speakers:** Kim Fetrow, Esq.,  
West Conshohocken, PA  
Michelle Smith, CDFAs, CFP,  
New York, NY

## ART TRACK PROGRAMS

8:30-9:45am

### What Every ART Lawyer Should Know about Estate Planning

Monroe

ART lawyers help their clients create and store genetics material and use it across international borders. This program will focus on estate planning issues related to those activities of which every ART lawyer should be aware.

**Speakers:** Carole Bass, Esq.,  
New York, NY  
Irit Rosenblum,  
Tel Aviv, Israel  
Richard Vaughn, Esq.,  
Los Angeles, CA  
Steven Weissman, Esq.,  
New York, NY

10:00am-12:00pm

### Insurance Issues in ART: Obamacare, Medicare, and Other International Insurance Mysteries

Monroe

Parents are crossing borders to have children on a regular basis. This panel will discuss how both U.S. and international insurance options may (or may not) apply to the medical expenses incurred in such cases.

**Moderator:** Diane Hinson, Esq.,  
Chevy Chase, MD

**Speakers:** Virginia Hart,  
Valencia, CA  
Shirley Levitan, Solicitor,  
Toronto, Ontario  
Lee Ruben Collins, Esq.,  
Natick, MA

12:15-1:30pm

### Committee Meetings and Working Lunch

Swann Restaurant

Committee meetings are open to all Family Law Section members and allow you to learn more about a specific practice area. Committee membership is an excellent member benefit and a great way to meet other conference attendees while learning about committee activities. **Adoption, Alternative Dispute Resolution, Child Support, Domestic Violence, Governmental Relations, International Law, Taxation, Trial Practice & Techniques, and Young Lawyers** Committees will meet today.

**Tickets:** \$35

1:45-4:00pm

### Assisted Reproductive Technology Model Act & Committee Meeting

Boardroom 461

7:00pm

### Dine-Arounds

With tables reserved at some of the best eateries in Philadelphia, this fun "Dutch treat" event is an excellent opportunity to enjoy dinner at fabulous restaurants while networking with conference attendees. Sign up in the Hospitality Room before 11:30am.

9:30-11:00pm

### Chair's Suite Reception