

*Arizona Paralegals*  
**Taking on the  
Challenge of Change**



ARIZONA PARALEGAL ASSOCIATION

**2019 ANNUAL  
LEGAL CONFERENCE**

**FRIDAY, MAY 3, 2019**



245 E. Jackson Street  
Phoenix, AZ 85004



[www.AZParalegal.org](http://www.AZParalegal.org)

The APA is an affiliate of  
NALA, the Paralegal Association

## 2019 Conference Highlights

- Excellent speakers and three Breakout Sessions
- 5.0 hours of CLE credit (legal and ethics educational sessions)
- Vendor Fair (and prize drawings after lunch!)
- Networking opportunities
- Breakfast and refreshment breaks, unlimited all-day drinks
- Luncheon buffet and time to network and mingle—inside or outside
- Downloadable/printable speaker handouts
- Printed conference brochure
- APA and paralegal-branded merchandise available
- Don't worry about parking—we've got you covered
- FREE Wireless Internet
- MORE door prizes and giveaways at close of conference!

Events on Jackson is a unique urban venue located in the Warehouse District of downtown Phoenix. It has high-tech functionality with historic charm.

**EVENTS**  
on **JACKSON**

245 E. Jackson St.  
Phoenix, AZ 85004



Morning Keynote Speaker:



## Legal Ethics Through Popular Culture

**Maria Fernanda Hubbard, Esq.**

*Associate, Polsinelli*

This interactive presentation will take a hard look at the ethical obligations of attorneys and paralegals in today's technological age. During the presentation we will discuss common ethical pitfalls and will provide information for how to avoid them by examining the behaviors of attorneys and paralegals that society is exposed to through popular culture as well as examining real life examples. The presentation will provide attendees with practical information for how the ethical cannons are applied in everyday life.

**5.0 hours of CLE credit provided, including ethics credit**  
CLE certificates will be available at the conclusion of the conference.

**"The presenters were very interesting and engaging."**

**"Venue was excellent. Speakers were interesting."**

**"Great venue, great speakers, fabulous food."**

2018 APA Annual Legal Conference Survey Results





## Changing Rules, Changing Times: How the New Rules Are Working, and What You Need To Know

**Andrew Jacobs, Esq.**

*Partner, Snell & Wilmer*

Andrew will explain how the landscape of procedural rules changed from January 1, 2017 to January 1, 2019, a period of change almost without precedent in Arizona's civil law history, what you need to know to navigate the thicket of changes, and how the changes are working to this point.



## Intellectual Property: A Quick Primer on Patents and Trademarks and the Role of the Paralegal

**Ari M. Bai**

*Partner, Polsinelli*



**Timothy D. Fontes**

*Associate, Polsinelli*

This presentation will provide attendees with an overview of patent and trademark practice. Ari and Tim will emphasize on the role of the paralegal in a busy IP practice, including the paralegal's work with the United States Patent & Trademark Office, reviewing and maintaining a docket, conducting searches, trademark filings and domain name and designs. They will share what works for them and their paralegal staff to make their practice run smooth and how building a strong attorney/paralegal partnership in an IP practice is one of the keys to success. They will walk through examples of inquiries or requests for assistance generally asked of an IP paralegal and will provide examples of long-term projects and short term projects/tasks that the paralegal is expected to encounter. They will further provide specific examples dealing with "change"; i.e., examples of experiences to expect in view of recent USPTO changes and developments in IP generally.



## Finding, Vetting, and Retaining Technical Experts in Arizona

**James Swinyard**

*Robson Forensic*



**Mark Songer, FDE**

*Robson Forensic*

Finding the right expert can be cumbersome and time consuming but when equipped with the right tools you can save time, money, and make a better, more informed decision. Our discussion will include: (1) Discerningly Selecting Technical Experts, (2) Finding the Expert you Need, (3) Vetting Potential Experts, and (4) Tips for Retaining & Working with Experts.



## How Technology Is Changing Business and What Paralegals Need to Know About It

**Laura Rogal, Esq.**

*Partner, Jaburg Wilk*

Business tools are constantly evolving. As paralegals, you need to be aware of not only what tools are now available to a business, but how the business might use them. There are two layers to this knowledge base. First, in a litigation sense, understanding what technology exists and its purpose allows for more targeted discovery and access to information. Second, from a transactional and general business sense, you can use these tools to your advantage to become more efficient in the same manner as any other business. We will talk generally on what these technologies are, and how they can be used both for an investigative purpose and for general tasks.

### **DID YOU KNOW?**

**Non-Members: If you join the APA before the conference, you can save \$\$ on the conference fee, attend one CLE webinar for FREE in 2019 (\$25 value), and enjoy the additional benefits of being a member of the APA!**



## Jury Selection the Paralegal Way: Optimizing Your Contribution to the Voir Dire Process in Changing Times

**Karen O. Lisko, Ph.D.**  
*Senior Litigation Consultant*  
*Perkins Coie LLP*

Given how “harried and varied” the jury selection phase can be from jurisdiction to jurisdiction, the role you play can make all the difference in helping your trial team focus on strikes. Dr. Karen Lisko will take us through the process she uses to prepare for jury selection especially in light of shrinking oral voir dire time in many courts, the ways she collaborates with paralegals during the process, and some jury selection techniques you can take back to lead counsel.



## Start to Finish – The Paralegal’s Role in a Real Estate Purchase and Sale Transaction

**Lindsay A. Jewell, Esq.**  
*Partner, Perkins Coie LLP*



**Sean M. Berens, Esq.**  
*Associate, Perkins Coie LLP*

We’ll walk through chronologically the typical life cycle of a real estate transaction and provide some training as to the tasks and responsibilities a paralegal is typically asked to handle over the course of a deal.

# Schedule of Events

7:15-8:00 AM	<b>Registration, Breakfast, Vendor Fair</b>
8:00-8:15 AM	Welcome and Announcements
8:15-9:30 AM	<b>Morning General Session Keynote Presentation:</b> <b>"Legal Ethics Through Popular Culture,"</b> Maria Fernanda Hubbard, Esq., Polsinelli
9:30-9:45 AM	<b>Morning Break; classroom changes</b>
9:45-11:00 AM  Breakout Sessions	<b>A. "Changing Rules, Changing Times: How the New Rules Are Working, and What You Need To Know,"</b> Andrew M. Jacobs, Esq., Snell & Wilmer  <b>B. "Intellectual Property: A Quick Primer on Patents and Trademarks and the Role of the Paralegal,"</b> Ari M. Bai, Esq. and Timothy D. Fontes, Polsinelli
11:00-12:30 PM	<b>Buffet Luncheon, Networking time, and last visit to the Vendor Fair before Vendor Prize Drawings</b>
12:30-1:15	Afternoon Announcements and <b>Vendor Prize Drawings</b>
1:15-2:30 PM  Breakout Sessions	<b>A. "Finding, Vetting, and Retaining Technical Experts in Arizona,"</b> James Swinyard and Mark Songer, FDE, Robson Forensic  <b>B. "How Technology Is Changing Business and What Paralegals Need to Know About It ,"</b> Laura Rogal, Esq., Jaburg Wilk
2:30-3:00 PM	<b>Mid-Afternoon Break, refreshments</b>
3:00-4:15 PM  Breakout Sessions	<b>A. "Jury Selection the Paralegal Way: Optimizing Your Contribution to the Voir Dire Process in Changing Times,"</b> Karen O Lisko, Ph.D., Senior Litigation Consultant, Perkins Coie  <b>B. "Start to Finish – The Paralegal's Role in a Real Estate Purchase and Sale Transaction,"</b> Lindsay Jewell, Esq. and Sean Berens, Esq., Perkins Coie
4:15-5:15 PM	<b>Conference prize drawings</b>



**Ari M. Bai, Esq., Partner, Polsinelli**

A former patent examiner at the U.S. Patent & Trademark Office and an in-house patent counsel for a multimillion dollar company, Ari Bai brings unique perspective and experience for assisting clients in protecting and leveraging their proprietary technologies. With more than 20 years' experience navigating through the complexities of patent prosecution, clients rely on him to identify and protect disruptive technologies affecting the market, Ari is committed to delivering results for clients who need to protect their most important inventions. Ari has significant experience with identifying inventions that are suitable for patent protection, preparing and prosecuting patent applications before the U.S. Patent & Trademark Office to obtain patent protection on complex inventions, providing counsel on strategies for protecting inventions that will influence the market, and representing medical device companies in navigating the unique challenges of obtaining patent protection for this type of invention. Ari is a frequent educational speaker on topics critical to patent clients and remains abreast of legal trends that affect the potential patentability of clients' product lines. Ari was selected by *Arizona Business* magazine as a Leader in Law in Intellectual Property in 2019. He was also selected by *Arizona Business* magazine as Arizona's Top Lawyers – Intellectual Property, 2013, 2014.



**Sean M. Berens, Esq., Associate, Perkins Coie LLP**

Sean Berens is an associate with the Real Estate & Property Development practice. Sean focuses on leasing, financing, purchase and sale transactions and other matters related to commercial real estate. Before joining Perkins Coie, Sean was an associate in the New York office of Greenberg Traurig, where he provided land use advice to developers, lenders and building owners. Sean is active in pro bono matters, which have included representation of a victim of human trafficking and immigration representations.



**Timothy D. Fontes, Esq., Associate, Polsinelli**

Timothy Fontes draws upon his combined background of business and technology to pursue maximum value for the intellectual property of Polsinelli's clients. Whether through trademark, copyright, patent, or other forms of intellectual property law, Tim endeavors to provide a broad spectrum of guidance. He believes in listening carefully to clients with the goal of developing long-lasting relationships. Tim has worked with a broad range of technical areas including: Medical devices, Semiconductors, Analog and digital circuits, Audiology devices, Software, Networking and internet technology, Media technology, and various other computer, electrical, and mechanical devices.



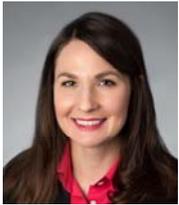
**Maria Fernanda Hubbard, Esq., Associate, Polsinelli**

Maria Fernanda Hubbard is a business litigation attorney with an emphasis in insurance recovery. She works with clients to proactively help them respond to insurance issues involving representation on property and casualty lines, product liability, toxic and mass torts, environmental and natural resources liabilities, errors and omission policies, captive insurance, and self-insured retentions. She was recently named by AZ Business Magazine as one of 12 Millennials to Watch in 2019, and was highlighted as one of tomorrow's leaders who is making an impact today. Hubbard is currently serving a three year term on the newly established Arizona Supreme Court Attorney Ethics Advisory Committee. She also serves on the Arizona Supreme Court Attorney Regulation Advisory Committee. Hubbard is active in Los Abogados and the Hispanic National Bar Association. She was recently named one of Arizona's Top 50 pro bono attorneys by the Arizona Foundation for Legal Services & Education. In 2017, Hubbard was one of 50 Latina attorneys selected nationally to participate in the Latina Leadership Academy. A graduate of the University of Arizona, Hubbard earned her B.A. in mathematics and went on to earn her J.D. summa cum laude from the James E. Rogers College of Law. Prior to joining Polsinelli, she clerked for the Honorable Ann A. Scott Timmer of the Arizona Supreme Court.



### **Andrew Jacobs, Partner, Snell & Wilmer**

Andrew Jacobs is a 1992 graduate of Harvard Law School, magna cum laude, is a partner at Snell & Wilmer and leads its appellate practice. He led the State Bar Civil Practice and Procedure Committee from 2014 to 2018 and was a major contributor to the 2017 and 2018 revisions to the Arizona Rules of Civil Procedure. He was named Member of the Year by the Arizona State Bar in 2016 along with two others. In March 2019, Andrew was one of five persons nominated by the Appellate Court Appointments Commission for Governor Ducey's consideration for the Arizona Supreme Court vacancy to be filled in April 2019.



### **Lindsay A. Jewell, Partner, Perkins Coie LLP**

Lindsay Jewell, a partner in the Real Estate & Land Use practice, is a deal lawyer who negotiates, documents and closes complex transactions on both the buyer's and seller's side in an efficient, proactive and organized manner. Lindsay works on local and multistate real estate transactions and has significant experience in the hospitality industry, including acquisitions, dispositions, hotel finance, REIT structuring, joint ventures, franchise and hotel management agreements, and development, asset management and operational matters. Additional areas of Lindsay's experience include retail and office lease negotiations, financing transactions on both the borrower's and lender's side, corporate governance, and complex title and survey review and similar due diligence matters. She also has counseled clients with respect to licensing and regulatory compliance under state and federal laws. Lindsay frequently works on various aspects of CMBS specially serviced commercial real estate loans, including loan modifications, forbearance agreements, discounted pay-offs, foreclosures and REO dispositions for a wide variety of commercial properties. These include retail centers, office complexes, industrial parks, hotels and multifamily buildings.



### **Karen Lisko, Ph.D., Senior Litigation Consultant, Perkins Coie**

Litigation consultant Karen Lisko, Ph.D., works with attorneys to make them more persuasive. Karen relies on 30 years of experience conducting mock trials and interviewing actual judges and juries to strategize with legal teams in civil and criminal litigation. Karen holds a doctorate in legal communication, a specialized degree attained by only a few consultants in the nation, and is the author of two books, *Patently Persuasive* and *Proven Jury Arguments and Evidence*.



### **Laura Rogal, Partner, Jaburg Wilk**

Laura is an attorney with the Phoenix law firm Jaburg Wilk. She assists clients with their commercial litigation and offers guidance in resolving disputes without court intervention. Her work focuses on intellectual property, employment, internet law, defamation, emerging business and technology. She has assisted a high profile Internet business, with heavily contested litigation in several states; grow by achieving successful resolution through motion practice, document intensive discovery, electronic discovery, negotiations and oral arguments. Being an active community member is important to Laura. She is a graduate of Scottsdale Leadership Class XXIII as well as being active in the State Bar of Arizona, as an Executive Committee Member at Large of the IP Section and Past Chair of the E-commerce and technology sections. She has been a mentor at SEED SPOT and has experience as both a support team member and an Event Team member for Ignite Phoenix. Laura is a CONNECT board member of Boys and Girls Club of Metro Phoenix. Additionally, she was previously the Southwest Region Chair of Women's Lacrosse Officials, US Lacrosse and is also an official in the Western Women's Lacrosse League. Offering a fresh perspective to her clients on not only the law, but also enhancing attorney client relationships through straightforward communications is a strong suit of Laura's. She has always been an athletic individual and finds that the same qualities which have helped her excel in sports also help her excel as an attorney, namely, discipline, concentration and a competitive spirit.



### **Mark Songer, Expert, Robson Forensic**

Mark Songer is a court qualified expert in Forensic Document Examinations. He provides investigations, reports, and testimony towards the resolution of matters involving disputed documents or signatures, including: wills, checks, contracts, deeds, account ledgers, medical records, and autograph authentication. Mark is a former FBI Special Agent and FBI Forensic Examiner, and was the designated handwriting expert for the Evidence Response Team-Los Angeles. During his tenure in the FBI, Mr. Songer instructed numerous law enforcement officers and examiners in handwriting identification, crime scene investigations and the collection of writing samples. He has also developed and implemented Criminal Justice and Forensic Science programs at several institutions of higher learning, including the University of California and La Sierra University. In addition, Mark is a former Adjunct Professor of Forensic Science at National University, San Diego, California. Mark served in both the U.S. Marine Corps and U.S. Army (ROTC), and is a life-time member of the Veterans of Foreign Wars.



### **James Swinyard, Business Development, Robson Forensic**

James Swinyard manages business development efforts across the Western Region of the United States, including the firm's involvement with regional legal organizations. Prior to joining Robson Forensic, James worked closely with engineers and architects in the Land Use Consulting and Green Architecture industries. This experience has contributed toward his understanding of construction and environmental issues. A graduate of Washington State University, where he majored in finance, James' education and professional experience have helped him to develop a nuanced understanding of the way codes, standards, and finance factor into litigation. When he isn't developing the western region, James enjoys exploring the local food scene and shedding the carbs on his snowboard.



## Charitable Fun to Benefit Maggie's Place



The APA has chosen Maggie's Place as its charity this year. Maggie's Place provides life-changing programs and services for pregnant and parenting women and their children by offering a warm and welcoming community, a safe place to live and learn, and on-going services to help them become self-sufficient.

Maggie's Place qualifies for the Arizona Charitable Tax Credit and is also seeking volunteers to keep its homes functioning and enriching the lives of the women and children it serves. Explore opportunities to serve at [www.maggiesplace.org](http://www.maggiesplace.org).



### Back to School Shoe Drive (in partnership with DISCO Cares)

APA sponsor DISCO has committed to providing 100 pairs of shoes for Maggie's Place's back to school shoe drive. DISCO has also promised to match whatever the APA contributes dollar for dollar. Maggie's Place is asking for monetary donations for this shoe drive—either cash, checks or gift cards. We will have a special place at our registration table for you to drop off donations. We are very excited to partner with DISCO Cares and Maggie's Place for this shoe drive.

**For every \$10 donated, you will receive a raffle ticket for a special prize drawing at the end of the day. This is separate from our regular end of the day prizes.**

The APA is participating in the Back to School event on Saturday, July 20th from 9:00—11:00 am at Maggie's Place located at 4001 N. 30th Street in Phoenix. We are looking for volunteers to help at the event. Come see how APA members are making a difference in our community!



### Handmade Quilt Raffle

This year the APA will be raffling off another beautifully handmade quilt (photo is not the one being offered). All proceeds of the raffle will go directly to Maggie's Place.



Miracle of Motherhood event is being held at The Clayton House in Scottsdale on Friday, September 27, 2019. See the event registration page on the Maggie's Place website for more details and to purchase tickets.

## Arizona Paralegal Association's Paperless Seminar

All speaker handouts will be available prior to the Seminar (a link will be emailed to all registrants). Download the materials to your device or print before the conference, or connect wirelessly during the conference!

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**Registration**



245 E. Jackson St.  
Phoenix, AZ 85004

**REGISTER ONLINE TODAY:**

<http://azparalegal.org/event-3285450>

**Deadline to Register: Wednesday, April 24, 2019**

**REGISTRATION PRICES:**

APA Member*	\$100
Non-Member NALA or NALA affiliated Association Member, or CP or ACP*	\$120
Non-Member*	\$200
APA Student Member* (w/ current student ID)	\$ 75
Student Non-Member* (w/ current student ID)	\$100

***We accept PayPal or Check***

*\*Prices above are per person and include entrance to full seminar, breakfast, Vendor Fair, breaks and luncheon, and access to online seminar materials.*



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**or contact:**

Teresa Romero, CP

[teresaromero.apa@gmail.com](mailto:teresaromero.apa@gmail.com)

For registration issues or questions, contact:

Teresa Romero, CP

[teresaromero.apa@gmail.com](mailto:teresaromero.apa@gmail.com)

**Cancellation Policy:** Registration fee will be refunded up to Friday, April 19, 2019. Thereafter, the registration fee, less a \$50 enrollment charge, will be refunded upon written cancellation received no later than Wednesday, April 24th. No refunds after April 26th. Thank you.

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The only way to make sense out of change is to plunge into it, move with it, and join the dance. ~ Alan W. Watts