

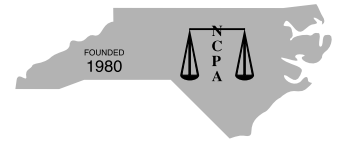


Spring 2015

North Carolina Paralegal Association, Inc.

# Forum

*noun* [C]; *för-əm*  
an occasion or a place for talking about a matter of public interest



# NCPA

March 19th, 2015 - March 21, 2015

**35TH ANNUAL MEETING & SEMINAR**

**Holiday Inn Resort**

**Wrightsville Beach, North Carolina**



## IN THIS ISSUE...

- (Almost) Everything You Need to Know About the Finances of Family Law
- 35th Annual Meeting and Seminar
- “Meet the Candidates” NCPA Nominations & Elections
- Protecting Your Client by Adding ID Verification Enforcement to Your Deposition Scheduling Checklist



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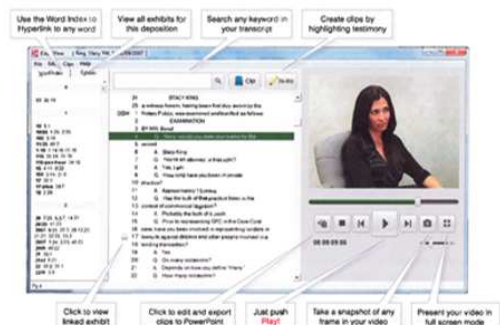


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Opinions expressed in articles and features herein are those of the author, and do not necessarily reflect the views of NCPA. The Editor strongly encourages the submission of materials for publication. The Editor reserves the right to edit material and accept or reject materials submitted.



## Table of Contents

President's Message .....	2
Chairman's Message .....	2
Editor's Court .....	2
Calendar of Events .....	4
Report of the 2nd Vice President (Membership) .....	4
(Almost) Everything You Need to Know About the Finances of Family Law .....	5-9
Protecting Your Client by Adding ID Verification Enforcement to Your Deposition Statement .....	10-11
AMICUS - District Directors' Report .....	12-13
"Meet the Candidates" NCPA Nominations & Elections .....	14-15
NCPA 35th Annual Meeting & Seminar Schedule .....	16-21
NALA News .....	22-29
NCPA Contact List .....	30

# Moving?

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## President's Message

Patricia F. Clapper, ACP, NCCP



Our Education Committee has done a wonderful job of putting together a great speaker lineup for our 35th Annual Seminar and Meeting. Be sure to visit our website to register for this seminar, to be held March 19-21, 2015 at the Holiday Inn Sunspree in Wrightsville Beach. We have some unique entertainment lined up for Friday night, I heard that may be a "murder" and we will need your help to solve it!

It is also time for membership renewal. If you do not renew by Feb 28th, you will be marked inactive and you will have to complete a new membership application. You can renew (and join) online or via a paper application. Send an email to [membership@ncparalegal.org](mailto:membership@ncparalegal.org) if you have questions about your membership or joining NCPA.

Have you thought about volunteering with NCPA but weren't sure what to do or if you would have time to volunteer? If so, I encourage you to visit our website and read the information on the various committee positions. Joining a committee is a great way to begin volunteering with NCPA. We have positions that require little time and some that require more time. If you will contact us, we will find something to fit your schedule and area of interest.

As I close this message, my last one as NCPA's President, I want to say that it has been an honor and privilege to serve as President of one of the best paralegal associations in the nation. NCPA is well thought of by other paralegal associations across the country. You should be proud to be a member of NCPA, I am certainly proud to have had the opportunity to serve as its President.

I hope to see all of you in March!

*Patricia F. Clapper, ACP, NCCP*

President

## Chairman's Message

Karen F. England, NCCP



NCPA's 2015 Annual Seminar is almost here! I hope everyone is making plans to attend Annual this year, which is March 19-21, 2015 at the beautiful Holiday Inn Resort in Wrightsville Beach. Registration is open, so reserve your spot and let's see you at the beach. I have heard some of the plans, and I know you won't be disappointed this year. I've even heard something about a murder mystery!!! You won't want to miss this year's Friday night banquet!

If you have been thinking about getting more involved in NCPA, this is the best time of year to do it. Just let either Patti Clapper or me know; there are plenty of places to put your special talents to work for your association.

This will be my last column as Chairman of the Board, and I can't believe how fast time goes by. The last two years have been very busy, eventful, full of ups, downs and everywhere in between. I have truly enjoyed every minute, and I would like to thank Patti Clapper for giving me this opportunity to serve as NCPA's Chairman of the Board. I look forward to the coming year and all the new possibilities it holds.

*Karen F. England, NCCP*

Karen F. England, NCCP  
Chairman of the Board



## Editor's Court

Charity L. Inglis,  
ACP, NCCP

I would like to thank everyone at the North Carolina Paralegal Association for all the help and support they have shown me during my transition period into the position of Senior Editor of the FORUM. I also would like to thank my team members, Sharon Gittin, NCCP and Mary Moore, NCCP for their hard work this past year and look forward to another great year with an

awesome NCPA Forum Editorial Staff. As always, please ensure you check out the Calendar of Events, and don't forget to register for our 35th Annual Meeting and Seminar, coming up on March 19-21 at the Holiday Inn Resort in Wrightsville Beach. The schedule of events and registration forms are in this issue. It should be a great weekend. I hope to see everyone there!

*Charity L. Inglis, ACP, NCCP*

Senior Editor, NCPA FORUM



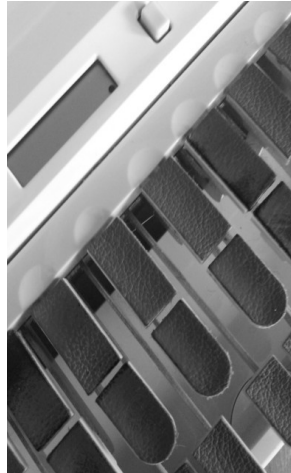
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## Report of Second Vice President

Martha Blackman-Hughes, ACP, NCCP

The current membership breakdown as of February 11, 2015 is as follows:

General members:	215
Associate members:	51
Student members:	217
Sustaining Members:	15
Affiliate members:	2
<u>Educational Program members:</u>	<u>4</u>
Total	504

NCPA is proud to recognize the following Sustaining members:

Case-Closed Investigations, CaseWorks Inc., Chapel Hill Court Reporting, Chaplin & Associates, Inc. CourtLogic, Incorporating Services, Ltd., Lawyers Mutual Liability Insurance Co., Legal Media Experts, LLC, National Digital Forensics, Inc., Ruffin Consulting, Inc. and Triad Land Surveying, P.C.

NCPA would also like to recognize our Affiliate and Educational Program members:

Alamance County Paralegal Association, Caldwell Community College and Technical Institute, Carteret Community College Paralegal Technology Program, Cumberland County Paralegal Association, Guilford Technical Community College and Southwestern Community College.

Memberships in NCPA expire on January 31st and are removed on February 28th. Please renew your membership before February 28th by visiting our website and renewing online or downloading a paper application and mailing it in.

*Martha L. Blackman-Hughes, ACP, NCCP*

Martha Blackman-Hughes, ACP, NCCP  
Second Vice President, Membership Chair

## CALENDAR OF EVENTS

### MARCH

March 19-21, 2015

NCPA's 35nd Annual Meeting and Seminar  
in Wrightsville Beach, NC

### April

April 1, 2015

Deadline to register for May 2015

CLA/CP Exam

April 2015

NCCP Examination

April 10, 2015

Late Application Deadline to Register for  
May 2015 CLA/CP Exam (\$25 late filing fee)

April 25, 2015

Orientation/Board/EC Meeting

10:00AM

High Point, NC

### May

May 1-31, 2015

Testing window for NALA CLA/CP Exam

### July

July 22-24, 2015

NALA 40th Annual Convention, Institutes,  
and Exhibition

## **(Almost) Everything You Need to Know About the Finances of Family Law**

Elizabeth Vance, ACP, NCCP

As a veteran family law paralegal, there are two things I have learned that almost always surprise our married but recently-separated clients: first, how pervasive financial issues are in the legal process of separation and divorce, and second, how extensive, deeply personal, and even invasive the examination is of their financial affairs. People going through a separation are focused on, and rightly so, the daily concerns of the well-being of their children, of suddenly sharing custody of their children, of having to adjust to life without a live-in spouse, of finding a new residence, and of having to communicate with an estranged spouse. To add to this long list of concerns, the recently separated must endure the daunting process of gathering their financial documents and handing them over to an attorney and a paralegal for review and analysis. The process can be overwhelming, but is a necessary part of family law litigation. After the financial documents are reviewed and a support obligation established, the party then must be concerned with payment and enforcement of the support obligation. This series of articles will address some of the financial aspects of child support, postseparation support, and alimony claims.

### **Part I – Child Support**

This article does not address the specific procedures for IV-D child support cases or cases involving third party payors and payees; it only pertains to civil child support actions between a minor child's biological parents.

#### *Guidelines – applicable or not?*

In North Carolina, child support cases range from relatively simple to quite complex. For a typical family living on two modest salaries and having no children with special needs, the North Carolina Child Support Guidelines would most likely apply. The guidelines “are intended to provide adequate awards of child support that are equitable to the child and both of the child's parents.”

The guidelines apply to families with a combined gross monthly income of less than \$25,000 and consider the gross monthly income of each parent, child care expenses, cost of medical insurance premiums, and any extraordinary expenses the children may have, such as educational expenses necessary to meet the child's needs, or travel expenses back and forth between the parents' homes. The guidelines also consider a situation in which one or both parents have a child support obligation for children born of a previous or subsequent relationship.

For a family in which only one parent works, the court may find that the nonworking parent's unemployment (or underemployment) is an attempt to avoid paying child support. The court can impute (assign) an estimated income to the unemployed parent. The court can determine an amount based on the parent's recent work history, his/her qualifications and the local job market, or based upon a 40 hour work week earning minimum wage. There are cases that allow a trial court to impute income where a parent shows a naive indifference to his/her financial obligation to the child. Payments on a parent's behalf can be treated as income. For example, if another family member is paying the father's rent of \$500 per month, the court can add \$500 to the father's monthly income and this higher amount is used to compute the father's child support obligation. See the endnotes for a link to the newest guidelines revision, effective as of January 1, 2015, and a child support calculator based on these guidelines.



Using the child support calculator, one can compute the child support each parent is expected to contribute. Different worksheets can be generated based on the time the child spends with each parent – Worksheet A is for cases in which one parent has primary physical custody, Worksheet B is for cases in which the parents share equal or nearly equal physical custody, and Worksheet C is for cases in which one or more children reside primarily with the mother and another child (or children) reside primarily with the father. The Child Support Guidelines require each parent to provide the other with verification of current income for the period of one month and a copy of his/her most recent tax return to show income over a longer period of time. Some counties have adopted local rules that require more extensive financial documentation, such as financial statements (such as a credit application) they have provided to a bank or other lender within a stated period of time, two or more years of income tax returns, several months of bank account statements, and verification of income for the past several months. Most of us can readily find, or get online access to, these documents. Most North Carolinians would have a guidelines child support case and would not encounter the complexities and challenges of a non-guidelines case.

The guidelines provide that “the court upon its own motion or upon motion of a party may deviate from the guidelines if, after hearing evidence and making findings regarding the reasonable needs of the child for support and the relative ability of each parent to provide support, it finds by the greater weight of the evidence that application of the guidelines would not meet, or would exceed, the reasonable needs of the child . . . or would otherwise be unjust or inappropriate.” If the court decides to deviate, he/she must make specific written findings supporting the decision.

For families in which the combined gross monthly income of the parents exceeds \$25,000, a child support case can get very complicated, as the guidelines do not apply. When the court deviates from the guidelines or when it is a high-income case, the reasonable needs of the minor child are the first consideration for a judge in setting an amount of support; the judge must also consider the net estate of each parent, the income of each parent, and the standard of living of the parents and the minor child prior to the parents' separation. To determine the child's reasonable needs and the standard of living of the parents and child, attorneys will usually want to collect and analyze the parties' financial records for at least a year prior to separation, and from separation forward to the child support hearing. These records may include checking, savings, money market, and credit card statements; tax returns; documentation of private school tuition, medical expenses, costs of extra-curricular activities, child care, summer camps, and any other expenses incurred for the child. Many attorneys use financial software such as Quicken to enter the parties' expenses and generate reports of average monthly expenses based on categories, such as clothing, food, entertainment, etc.

In many high income cases, one or both parents may have an irregular income (such as those who are self-employed or who work on a commission basis) or may have an income that is difficult to quantify (i.e., sources of income include car allowances, stock options, or performance based bonuses). In these instances, the parties' business records must also be required, including business income tax returns, accounting ledgers, profit and loss statements, balance sheets, and income projections. Depending on the volatility of a business, these records may be needed for a period of three or more years. Analyzing these documents helps the attorneys, expert witnesses, and judges determine income trends over time, the parties' past income, and the potential future income of the parties. The judge must balance the needs and standard of living of the child with the money the payor parent has available after the payment of his/her own reasonable living expenses and financial obligations.

*Formalizing child support conditions*

continued on next page



Once an amount of support is determined, it may be formalized in one of three ways. If the two parents agree on an amount of support to be paid by one to the other, they may commit to the terms in a private child support agreement, in which they can set out how much money is paid, how long the payments will continue, and under what circumstances the amount can be increased or decreased. The parties have significant freedom in the specifics of the agreement – as long as they both agree in writing. Another option, if the parties have agreed to the terms of child support, is for them to submit a Consent Order to a judge for approval. If the parties could not agree on child support terms, they would have a hearing in front of a District Court judge. The judge would then enter an order determining how much one parent must pay to the other, how long the support must be paid, and in which manner the support is paid. Once an order is entered by the court, its terms can only be changed by a subsequent court order. In guidelines cases, a parent can request the order be reviewed and revised by the Court after three years if there has been a “substantial change of circumstances.” If the difference between the original child support and the new child support according to the guidelines is more than 15%, the court presumes a substantial change of circumstances. If this condition is not met, a parent may still move to increase or decrease the child support, but the court would have the discretion to determine if the change is “substantial.” There are many appellate cases addressing this topic.

#### *Other considerations:*

##### *Medical expenses*

For ordinary medical expenses, such as wellness and sick child visits, prescriptions, mental health counseling, dental care and orthodontics, the guidelines provide that the parent receiving child support pay the first \$250 of the child's expenses for each year. The court can order that any expenses over \$250 be paid by a particular parent, or can order that the parties split the rest of the expenses on a percentage basis. (If the father earns 80% of the parties' combined income, the court could decide that the father will pay 80% of the expenses, leaving the mother responsible for the remaining 20%.) For children with special medical needs, one of the parties may move to deviate from the child support guidelines to allow a judge to address the child's individual needs.

##### *College expenses*

In North Carolina, there is no statutory requirement that a parent support a child beyond the age of 18 years or the date of high school graduation (whichever occurs last), with a limited exception. A judge cannot order a parent to pay for a child's college education, regardless of the income of the parties or the needs and wishes of the child. If, however, the parties agree to the terms of paying college expenses, they can include these terms in a private child support agreement. Again, as long as both parties agree, they can include as much detail or as many conditions as they wish. For example, both parents may contribute a certain percentage of the educational expenses, a parent may only be willing to pay for an education at a public college or university, or a parent may contribute more money if the child attends that parent's *alma mater*.

##### *Bankruptcy of the payor parent*

Once a parent has been ordered to pay child support, he or she must continue to do so until a newer, superseding order is entered, or until the child turns 18 or graduates high school (again, whichever occurs last). Many payor parents assume that filing for bankruptcy will extinguish their child support obligation. These parents would be mistaken. Upon a debtor's application to a U.S. Bankruptcy Court under either Chapter 7, 12, or 13, there are certain creditors who must stay their collection actions against the party. The exceptions to these creditors are set out in 11 U.S.C. §362(b), and they do not include payee parents of child support.

As a Bankruptcy Court judge considers whether to discharge certain debts, the payor parent may look forward to a discharge (release from personal liability) of his/her child support obligation, including any attorney's fees he/she has been ordered to pay for the payee parent. However, the payor parent is once again going to be disappointed. There are 19 categories of debt eligible for discharge in proceedings under Chapters 7 and 12. Child support obligations are not among the 19 categories. (See 11 USC § 523a for a complete list.) The categories of dischargeable debt are also limited for Chapter 13 proceedings; however, child support and attorney's fees obligations are not eligible for discharge under Chapter 13, either.

### *Collection of child support*

Some parties can agree that child support will be paid by check or by direct deposit or electronic transfer to the payee parent's bank account. The primary benefit of these forms of payment is the speed with which the money can be transferred from one parent to the other. It is up to the payee parent to keep track of payments received and of delinquent, missing, or insufficient payments. The receiving parent may have to sue and take the payor parent to court to enforce the agreement. The payor parent could be required by the court to make the past due payments and even to reimburse the other parent for his/her attorney's fees and costs. The payor parent would also have to pay his/her own attorney for representation through the court process. Non-compliance can be very expensive!

When a child support order is entered, a judge can issue an Income Withholding Order or can order that the payor send payments through North Carolina Child Support Centralized Collections (NCCSCC). With an Income Withholding Order, the payor's employer withholds the payment from wages and transmits the funds to NCCSCC. If a parent makes payments directly to NCCSCC, he/she sends a payment by check, credit card, or automatic draft from his/her bank account. NCCSCC staff document the date and amount of the payment, then direct an electronic transfer to the payee parent's bank account. The payee parent may also elect to have the payment loaded onto a Visa debit card called an "NCKIDSCARD." Payments going through NCCSCC take longer to get from one parent to the other than a transfer directly between the parents. However, the NCCSCC system documents and tracks the payments and both parents can log in to the NCCSCC website to check the status of each payment and the arrears, if any. The NCCSCC's neutral documentation system may also prevent the payee parent from falsely accusing the payor parent of not making timely and accurate payments.

### *Non-payment of child support – other consequences*

Besides the possibility of being held in contempt and ordered to pay arrears and attorney's fees, the payor parent in arrears could have his/her wages garnished or an occupational, professional, driving, hunting, fishing, or other license revoked until he/she gets current with payments. Depending on the extent of the arrearages, his/her income tax refunds could be intercepted, liens placed on his/her property, or bank accounts seized. The delinquent parent may also face proceedings for civil or criminal contempt and is at risk to serve jail time.

### *- - and non-consequences*

It is commonly believed that one parent can legally withhold access to the children when the payor parent does not pay child support. However, in North Carolina, the payor parent is entitled to share custody and to have visitation rights, even when he/she does not pay child support or is delinquent with payments.

### *Links to Additional Resources*

[North Carolina General Statutes Chapter 50](#)

[North Carolina Child Support Guidelines & Calculator](#)

continued on next page

[NC Administrative Office of the Courts – forms and court contact information](#)  
[North Carolina Child Support Centralized Collections](#)  
[US Bankruptcy Court – the Basics](#)

*This article is not intended to be, and is not, a substitute for the advice of competent legal counsel, nor is it a step-by-step guide for filing or defending a child support action. Neither the author nor the North Carolina Paralegal Association, Inc. can provide legal advice. Such advice may be obtained from a competent attorney. Refer to the North Carolina Bar Association's Lawyer Referral Service.*

*Elizabeth Vance, ACP, NCCP, has been a family law paralegal at Wyatt Early Harris Wheeler, LLP, in High Point for 12 years. She received her paralegal certificate from the American Institute for Paralegal Studies, Inc. She earned her Certified Paralegal designation from NALA in 2006 and completed the Advanced Paralegal Certification Course on Family Law - Child Support, Custody and Visitation in 2013. She has been a North Carolina Certified Paralegal since 2006. Elizabeth currently serves as the Affiliate Director and is a past Secretary of the North Carolina Paralegal Association, Inc.; is a current member and a past President of Guilford Paralegal Association and is a member of the National Association of Legal Assistants.*



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## **Protecting Your Client by Adding ID Verification Enforcement to Your Deposition Scheduling Checklist**

Bonnie Ruffin, NCCP & Jennifer Bruce, NCCP  
Ruffin Consulting, Inc. Litigation Support Services

Many paralegals have to schedule depositions for their attorneys as part of their job duties. Depositions are usually needed as part of the discovery process and for trial. There are several types of witnesses who may be deposed: plaintiffs, defendants, treating physicians, expert witnesses and lay witnesses, to name a few. The paralegal's duties for scheduling depositions often include obtaining dates the witness will be available to be deposed, coordinating those dates with the schedules of their attorney and opposing counsel and securing a location. Once the date and location are set, the next step is to hire a court reporter to obtain the testimony of the witness, by oral or stenographic means, and to produce a verbatim transcript of the record.

### **Court Reporters Responsibility**

Court reporters are responsible for swearing or affirming the witness before the testimony can begin. Court reporters working in North Carolina are required to earn a notary commission to enable them to administer such oaths or affirmations. As public officers, notaries perform these duties under the authority of the Notary Act which requires their full and strict compliance to its provisions (G.S. §10B-3(13)).

The North Carolina Verbatim Reporters Association (NCVRA) and Ozzie Stallworth, Electronic Notarization and Notary Enforcement Director for the State of North Carolina/Department of the Secretary of State, issued a statement to all North Carolina court reporters recently outlining the notary laws in NC Statute §10B concerning witness identification (ID) and penalties resulting from not checking ID.

Having the reporter confirm the witness' ID at the deposition protects you, your client and your attorneys. Of course, it's also imperative that the person testifying be the person that the attorneys think they are, too. The oath reporters give to a witness is, in effect, asking: "Do you, whoever you are, swear (or affirm) that you will tell the truth?" In the courtroom, the clerk is authorized to have the witness swear they will tell the truth; then the first thing the witness is asked by the attorney -- or is supposed to be asked is to state their name for the record. If they lie about who they are when asked, they are committing perjury. The clerks can do that because they are officials of the court. Freelance reporters are not, and therefore have no authority to do anything like that. Instead, reporters must become notaries and work within those rules.

### **Paralegals Responsibility**

You may be wondering what this statement issued to court reporters must do with paralegals. If the witness being deposed does not have his/her ID at the deposition, the court reporter, by law, cannot take their testimony and the deposition may have to be re-scheduled for a time when the witness has proper ID present. Having to re-schedule the deposition for this reason could cause appearance fees charged by the reporter, and billable hours incurred by the attorney and travel costs, charged to the client.

If paralegals instruct the witnesses being deposed to bring ID to the deposition as part of their "deposition scheduling checklist," they are ensuring the correct identity of the witness and are preventing the deposition from possibly having to be rescheduled.



For more information, a few of the statutes are listed below:

**§ 10B-3 (22) Satisfactory evidence.** - Identification of an individual based on either of the following:

- a. At least one current document issued by a federal, state, or federal or state-recognized tribal government agency bearing the photographic image of the individual's face and either the signature or a physical description of the individual.

**§ 10B-20(c)** A notary shall not perform a notarial act if any of the following apply:

*(2) The principal or subscribing witness is not personally known to the notary or identified by the notary through satisfactory evidence.*

(2a) A notary shall not perform a notarial act if any of the following apply: The credible witness is not personally known to the notary.

**§ 10B-60(a)** The Secretary may issue a warning to a notary or restrict, suspend, or revoke a notarial commission for a violation of this Chapter and on any ground for which an application for a commission may be denied under this Chapter. Any period of restriction, suspension, or revocation shall not extend the expiration date of a commission.

**§ 10B-60(c)** A notary shall be guilty of a Class 1 misdemeanor if the notary does any of the following:

- (3) Takes an acknowledgment or administers an oath or affirmation without personal knowledge or satisfactory evidence of the identity of the principal.

**§ 10B-60(j)** Any person who knowingly solicits, coerces, or in any material way influences a notary to commit official misconduct, is guilty as an aider and abettor and is subject to the same level of punishment as the notary.



**NCPA  
FORUM  
NEEDS  
YOU!**

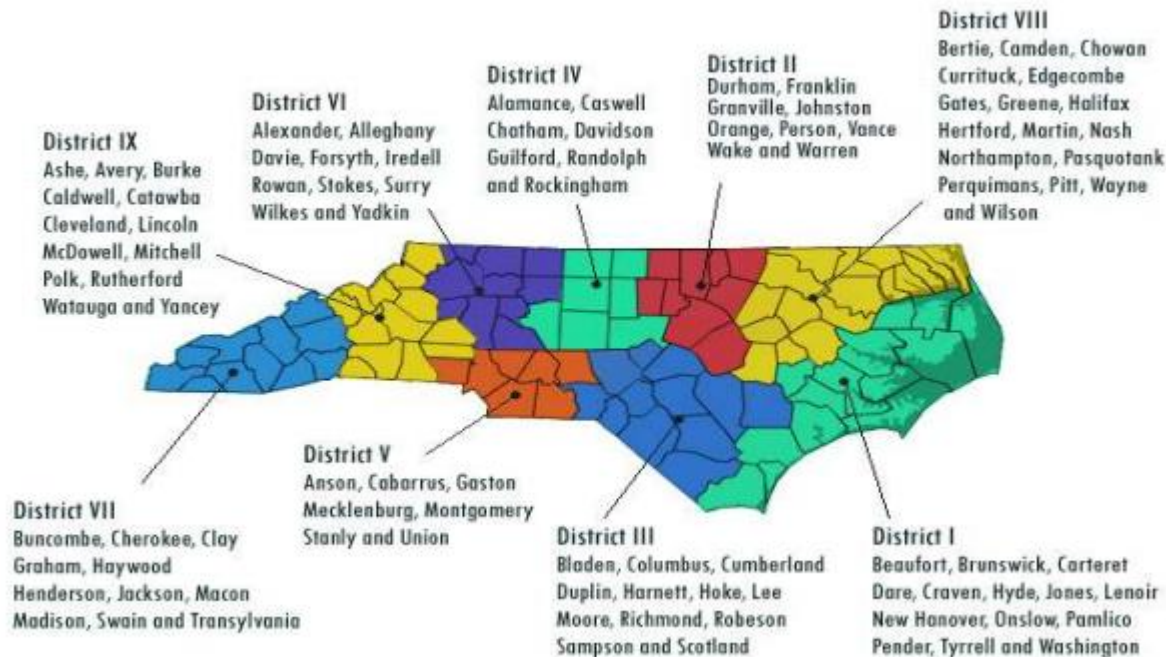
Short articles in the following areas are welcome: Tips and How-to's; Legal Updates; Ethics Corner; News Articles; Short essays; Professional Profiles; Member announcements and/or achievements; Suggestions for reprints.

Pitch, write and publish articles that show what you know! It's a fantastic way to make contacts, build your professional network and when a potential employer Googles you, they'll find not only a list of your social media profiles, but your credits and expertise as well!

Contact the NCPA Forum ([ncpaforum@gmail.com](mailto:ncpaforum@gmail.com)) if you'd like to contribute to future issues of the Forum, or if you simply have announcements or suggestions.

# AMICUS THE Director's Chair

Want to know what is going on in your district and which district you belong to? See below!



District I has 44 members. We are excited about the jump in membership numbers that District I has experienced over the last quarter. We've had welcome interest from the paralegal club at Cape Fear Community College and are looking forward to the excitement and ambition these students will bring to the association. NCPA's Annual Meeting & Seminar will once again be held in District I, in beautiful Wrightsville Beach. Hope to see everyone there! Any members interested in getting together for a meet and greet please contact Heather Padgett, District Director – [padgett.hn@gmail.com](mailto:padgett.hn@gmail.com)

District II has 170 members. In Spring of 2015 District II members would like to partner with the Pro Bono Chairperson to do more in the community this year. This will be something each person can do in their own areas and won't have to travel far. We'll designate a day or week for NCPA District II members to complete a community service, representing NCPA. This could entail donating clothes to the Goodwill or food to a homeless shelter. This will be something we can do to give back to our individual community. More information and requests for ideas to come. We also hope to schedule a time for a meet and greet in early April. The anticipated location would be Durham Tech and the speaker would be Atty. Joel White of the National Labor Relations Board.

District III has 39 members. District III is in need of a director. If you are interested, please send an email to [info@ncparalegal.org](mailto:info@ncparalegal.org).

District IV has 77 members. On December 8, 2014, District IV and District VI held a joint meet & greet/Holiday Dinner at Logan's Roadhouse in Greensboro. Everyone there had a great time and many prizes were given away thanks to The Fresh Market, Case-Closed Investigations and The Human Resource, and our District VI Director who donated some Mary Kay products. We were also pleased to have two representatives of CaseWorks present as well. For more information, please contact Karen England, District

continued on next page

**AMICUS - continued**

Director - [kengland@wehlaw.com](mailto:kengland@wehlaw.com). The Alamance County Paralegal Association meets the third Tuesday of each month at 12:30 p.m. The location is at a restaurant at the county seat in Graham, North Carolina. There is usually an educational speaker. On February 21, 2014 the Association will hold their spring seminar at the Vernon Law Firm in Burlington, North Carolina beginning at 9:00 a.m. The seminar is free to the membership and \$25.00 for non-members. The topics are Child Custody, Equitable Distribution, Bonds/Forfeitures, Criminal Procedures, Changes in the Ethics Laws and Notary Public Issues. Contact Katharine Kuczkowski at [kk@walkerbullard.com](mailto:kk@walkerbullard.com) to register or for more information on the association.

District V has 68 members. Members interested in getting together for a meet and greet please contact Stephanie B. Elliott, District Director - [selliott@gastonlegal.com](mailto:selliott@gastonlegal.com).

District VI has 56 members. 2014 was a pretty good year for District VI. We have had all of our Meet and Greets jointly with District IV and that has worked out really well. Our first Meet and Greet of the year was held on February 8, 2014. Lisa Rouchard from Human Resource of the Triad, Inc. was our guest speaker. Her topic was "Job Seeking 101". She gave great advice on resume drafting and on how to approach job interviews. Our second Meet and Greet was held and Leroy Everhart of Case Closed Investigations was our guest speaker. He gave a great presentation on conducting private investigations. On December 8, 2014, Districts IV & VI had combined holiday party at Logan's Roadhouse in Greensboro, North Carolina. There were several great door prizes given out, great food, and lots of fun. Once the NCPA Annual Meeting is over, we will be planning another joint Meet and Greet and will be looking for different ways to engage our student members. For more information, please contact Toni Morgan, District Director - [tonimorgan@thefreshmarket.com](mailto:tonimorgan@thefreshmarket.com).

District VII has 16 members. Members interested in getting together for a meet and greet please contact Stephanie B. Elliot, At Large Director - [selliott@gastonlegal.com](mailto:selliott@gastonlegal.com). District VII is in need of a director. If you are interested, please send an email to [info@ncparalegal.org](mailto:info@ncparalegal.org)

District VIII has 8 members. District VIII started an email group and plans to integrate the email group participants into a Facebook Group. If you live or work in the following counties, please contact Bonnie so you can be added. District VIII plans on having a Meet and Greet soon after the seminar in Wrightsville Beach. There will be a sign up sheet at the seminar or you can email me. District VIII includes the counties of Bertie, Camden, Chowan, Currituck, Edgecombe, Gates, Greene, Halifax, Hertford, Martin, Nash, Northampton, Pasquotank, Perquimans, Pitt, Wayne, and Wilson. Please email [BonnieR@RuffinConsultingInc.com](mailto:BonnieR@RuffinConsultingInc.com) to be included or if you know someone who lives in one of these areas, please pass this information along to them. Please email [BonnieR@RuffinConsultingInc.com](mailto:BonnieR@RuffinConsultingInc.com) to be added to the email list.

District IX has 26 members. A Meet & Greet is in the planning stages for after the Annual. Watch your inbox for full details. If you have any suggestions for activities for District IX contact Beverly K. Moore, NCCP, District Director at [bev@tissuelaw.com](mailto:bev@tissuelaw.com).

Affiliations Director – Correspondence has been sent to several local paralegal associations in North Carolina not currently NCPA affiliates. Anyone interested in your local associations becoming an NCPA affiliate, please contact Elizabeth Vance, ACP, NCCP, District Director at [evance@wehlaw.com](mailto:evance@wehlaw.com).

Chairman of the Board – Our districts still need to become more involved in holding meet & greets during the year. Some districts need directors. If you are interested in becoming a director or have ideas for a meet and greet, please send an email to [info@ncparalegal.org](mailto:info@ncparalegal.org).



## BEVERLY K. MOORE, NCCP

### CANDIDATE FOR PRESIDENT

Beverly King Moore is a paralegal for Tissue Law Offices, PLLC, in Charlotte, NC dealing with commercial real estate, and business organizations. She received her Paralegal Certificate from King's College in December 1995 and her NCCP designation in December 2005.

Beverly joined NCPA and NALA while studying at King's College. She currently serves NCPA as First Vice President and District IX Director. Other positions she has held in NCPA are: Chairman of the Board, Student/School Relations Chair, Second Vice President and Parliamentarian. Aside from her membership and positions in NCPA, she has been an active member of the Metrolina Paralegal Association (MPA) where she has held such offices as Third Vice-President, NALA Liaison, Patron Membership Chair and Social Committee Chair and Catawba Valley Paralegal Association (CVPA) and served as Law Update Committee Chair. She also serves as Site Coordinator for the Wade Edwards High School Mock Trial regional competition in Charlotte.

## KAREN F. ENGLAND, NCCP

### CANDIDATE FOR FIRST VICE PRESIDENT

I began my career as a legal secretary in 1978, and have worked in several law firms through the years in different capacities, from a small four-attorney firm to a firm with over 50 attorneys. I have been with the High Point firm of Wyatt Early Harris Wheeler for 21 years. My supervising attorneys are Bill Wheeler, John Bryson and Jonathan Keeler, and we work in the area of general litigation, estate litigation, complex business litigation, foreclosures and criminal law. I was Historian with NCPA for six years and District IV Director for the past six years, as well as Chairman of the Board for the past two years. In addition to being active in NCPA, I am also a member of Guilford Paralegal Association and currently serve as NCPA Liaison and NALA Liaison. I have previously served as GPA's Vice President, Secretary, past Historian and past Parliamentarian. In my spare time I like to scrapbook with my friends, accompany my husband on nature photography trips and travel. I am very excited to serve, if elected, as NCPA's First Vice President.



## PATTI CLAPPER, ACP, NCCP

### CANDIDATE FOR SECOND VICE PRESIDENT

My name is Patti Clapper and I am the candidate for NCPA's Second Vice President / Membership Chair. I am serving my 2nd term as President and have recently stepped into the Coordinator position. I have been an active member of the North Carolina Paralegal Association since 1996. I have served as the FORUM editor, District II Director, Treasurer, 1st Vice President and President. It seems only logical to step to fill a position I have not volunteered for yet.

I graduated from CCCC in 1993 with my AAS degree in Paralegal Technology. I have worked at the general practice firm of Levine & Stewart in Chapel Hill since 1995. I am a NALA Certified Legal Assistant with my specialization in civil litigation, and am certified by the North Carolina State Bar. I also serve on the curriculum advisory board for the paralegal program at Central Carolina Community College in Sanford and am an adjunct instructor there. I also serve on the NC State Bar Board of Paralegal Certification.

NCPA is a unique organization in that it is run BY paralegals FOR paralegals. I believe, for that reason, NCPA is the best paralegal organization in the State and you should be proud to be a member. I was proud to serve as its President for 3 years and am looking forward to serving the members of NCPA as Second Vice President.







**CHARITY INGLIS, ACP, NCCP**  
CANDIDATE FOR NALA LIAISON



My name is Charity Inglis and I am the candidate for NALA Liaison. My commitment to the paralegal profession has resulted in my participation in numerous paralegal professional organizations. I am a member of the North Carolina Paralegal Association (NCPA), North Carolina State Bar Association Paralegal Division, National Association of Legal Assistants (NALA), and the Research Triangle Paralegal Association (RTPA). I have held responsible positions in the NCPA as its Articles/Association News Editor for the NCPA Forum from 2013-2014 and currently serve as the NCPA's Senior Editor of the NCPA Forum. I also serve as a board member of the NC State Bar Board of Paralegal Certification.

I attended Johnston County Community College and attained my associate degree in paralegal technology in 2003. While working full time as a paralegal, being a mom and a wife, I attended Mount Olive College in RTP in the evenings and obtained my bachelors degree in Business Administration-Mgt & Organizational Development in 2008. Last year I returned to school to work towards a Masters in Human Resource Management and have an estimated graduation date of Spring 2016. I earned my North Carolina Certified Paralegal (NCCP) designation in 2006, my CLA designation from NALA in 2013, and my ACP designation from NALA in 2014. I would be honored to serve as NCPA's NALA Liaison.

**DIANE L. TALLY, NCCP**

CANDIDATE FOR PARLIAMENTARIAN

Diane L. Tally, NCCP. I began my career as a Paralegal in 2004 after graduating from Woodbury College in Montpelier, Vermont with my BS in Paralegal Studies. My first job was at a small law firm in Winston-Salem where I worked in different capacities. I then went to the High Point firm of Wyatt Early Harris Wheeler. While at this firm I assisted four litigation attorneys in the areas of employment, personal injury, contract, workers' compensation, wrongful death, environmental, business, banking, land condemnation and real estate law. I have been with this firm for 10 years and recently left to join BB&T as a Paralegal in the Commercial Fulfillment Department as a Document Specialist.

I became North Carolina State Bar Certified Paralegal in 2006. I am a member of the North Carolina Advocates for Justice since 2008 and a member of North Carolina Paralegal Association since 2004 where I have served as Secretary, First Vice-President and Parliamentarian.

In my spare time I love to spend time with my family and friends. I enjoy taking my two dogs on hikes and I love to sew and scrapbook. I am proud to serve as Parliamentarian for North Carolina Paralegal Association.

**MARTHA BLACKMAN-HUGHES, ACP, NCCP**  
CANDIDATE FOR SECRETARY

I am pleased to be considered for the office of Secretary. I have been a member of the NCPA for many years and have served the NCPA membership in various capacities during that time: Convention Coordinator (2010), Advertising Editor for the FORUM (2010-2012), Treasurer (2011-2014) and Second Vice President (2014-present). Holding these positions has allowed me to work closely with the Executive Committee and Board of Directors (EC/BD), and to observe and learn the duties required of other positions. I have a good working relationship with my fellow EC/BD members, a clear understanding of NCPA's goals and mission, and the commitment to the hard work and compromise necessary to make the NCPA a valuable resource for its members. I will bring that experience to bear on the office of Secretary.

I am a North Carolina State Bar Certified Paralegal, a NALA Advanced Certified Paralegal, and a graduate of the 2012 NALA Leadership Enhancement and Advancement Program. I have worked as a paralegal since 2001, and have experience in the areas of legal research, catastrophic personal injury and medical malpractice, real property, creditors' rights, and intellectual property. I am currently employed as a litigation paralegal for the intellectual property firm of Coats and Bennett, PLLC, in Cary.



# NORTH CAROLINA PARALEGAL ASSOCIATION, INC.

**35th ANNUAL MEETING & SEMINAR**  
**March 19, 2015 – March 21, 2015**



**HOLIDAY INN RESORT**  
**WRIGHTSVILLE BEACH, NORTH CAROLINA**



1706 N. Lumina Avenue  
Wrightsville Beach, NC 28480  
(910)-256-2231 or 1-877-330-5050

<http://www.wrightsville.sunspreeresorts.com/>

To attend, complete this registration form OR  
register for the seminar online at

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

continued on next page

## SCHEDULE OF EVENTS

### Thursday, March 19, 2015

6:00 p.m. - 8:00 p.m.

### **Early Registration & Exhibitor Exposition**

*Join us in welcoming our Exhibitors with light hors d'oeuvres and drinks (cash bar).*

### Friday, March 20, 2015

7:30 a.m. - 8:15 a.m.

### **Registration & Continental Breakfast**

8:15 a.m. - 8:30 a.m.

### **Welcome Remarks**

*Patricia F. Clapper, ACP, NCCP, NCPA President*

8:30 a.m. - 9:30 a.m.

### **GENERAL SESSION**

*Leadership For Paralegals in the 21<sup>st</sup> Century*  
*Bruce Robinson*  
*Virtu*

9:30 a.m. - 9:45 a.m.

### **Break - Visit with Exhibitors**

9:45 a.m. - 10:45 a.m.

### **CONCURRENT SESSION A**

*Contracts 101 (Part One)*  
*Marvin Genzer*

### **CONCURRENT SESSION B**

*10 Things a Superior Court Judge Wants You to Know...*  
*Judge Ola Lewis*

10:45 a.m. - 11:00 a.m.

### **Break – Visit with Exhibitors**

11:00 a.m. - 12:00 p.m.

### **CONCURRENT SESSION A**

*Contracts 101 (Part Two – Continuation of Session A Above)*  
*Marvin Genzer*

### **CONCURRENT SESSION B**

*Business Court*  
*Benjamin R. Norman*  
*Brooks Pierce*

12:00 p.m. - 1:30 p.m.

### **LUNCH & LEARN**

12:15 p.m. – 1:30 p.m.

*Joy Belk – NC State Bar - Certification (Optional)*

1:30 p.m. - 2:30 p.m.

### **GENERAL SESSION**

*Diversity and EEO Awareness*  
*Travis Nicholson*  
*U.S. Equal Employment Opportunity Commission*

2:30 p.m. - 3:00 p.m.

### **Break/Set Up for Annual Meeting**

continued on next page

3:00 p.m. - 3:15 p.m.	<b>Registration for Annual Meeting</b>
3:15 p.m. - 5:30 p.m.	<b>Annual Meeting – Election of Officers</b>
6:30 p.m. - 8:30 p.m.	<b>Murder Mystery Dinner &amp; Introduction of Officers</b> <i>Please join us for dinner and a chance to win a FREE registration to NCPA's 2016 Annual Seminar</i>

**Saturday, March 21, 2015**

8:00 a.m. - 9:00 a.m.	<b>CLA/CP Breakfast</b> <b>(NALA Certified CLAs and CPs only)</b> <i>Kelly A. LaGrave, ACP</i> <i>NALA President</i>
8:30 a.m. - 9:00 a.m.	<b>Continental Breakfast</b>
9:00 a.m. - 10:00 a.m.	<b>CONCURRENT SESSION A</b> <i>"The Corporate Sandwich"</i> <i>Kim Sharpe</i> <i>Incorporating Services, Ltd.</i>
	<b>CONCURRENT SESSION B</b> <i>What Does CFPB Stand For (and What the CFPB Will Not Stand For!)</i> <i>Jonathan Biggs</i> <i>Investors Title</i>
10:00 a.m. - 10:15 a.m.	<b>Break</b>
10:15 a.m. - 11:15 a.m.	<b>CONCURRENT SESSION A</b> <i>Dealing with Emotional Impact of Crimes on Victims</i> <i>Karen Scott</i> <i>Wake County District Attorney's Office</i>
	<b>CONCURRENT SESSION B</b> <i>Integrated Disclosure: Know Before You Show</i> <i>Jonathan Biggs</i> <i>Investors Title</i>
11:15 a.m. - 11:45 a.m.	<b>Break (Hotel Checkout)</b>
11:45 a.m. - 12:45 p.m.	<b>GENERAL SESSION (Ethics)</b> <i>Are you Doing Your Ethical Due Diligence?</i> <i>Crystal S. Carlisle, Esq.</i> <i>The Brocker Law Firm, P.A.</i>
12:45 p.m. - 1:00 p.m.	<b>Closing Remarks and Door Prizes</b> <b>(must be present to win)</b>

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**CONTINUING LEGAL ASSISTANT EDUCATION CREDIT:****National Association of Legal Assistants, Inc. (NALA):**

This seminar is pending the requirements of the Certifying Board of the National Association of Legal Assistants, Inc. for 7 hours (including 1 hours of Ethic) of Continuing Legal Education units toward maintenance of the Certified Legal Assistant credential.

**North Carolina State Bar Board of Paralegal Certification (NCCP):**

This seminar is pending approval by the North Carolina State Bar Board of Paralegal Certification for Continuing Paralegal Education in the amount of 6 hours of general CPE credits including 1 hour professional responsibility CPE credits. Any NC certification questions should be directed to the North Carolina State Bar's Paralegal Certification Board.

**REFUNDS:**

- If we receive your request by March 13, 2015, we will issue you a full refund, less a \$10.00 cancellation fee.
- If we receive your request between March 13, 2015 and March 17, 2015, we will issue a 50% refund.
- If we receive your request on or after March 18, 2015, no refund will be issued.
- You must notify the 1<sup>st</sup> Vice President, Beverly Moore, NCCP at 704-321-4745
- Refunds are not issued until after the seminar is completed.

**DISCOUNTS:**

Law offices or corporations with three (3) or more paralegals attending the seminar, or three (3) or more paralegal students registering simultaneously, will be entitled to receive a 10% discount on the registration fee only. Discount does not apply to additional lunch or dinner tickets, CLA breakfast, or manuscript purchase.

**Registration forms and fees must be received simultaneously to ensure proper credit for discount.** Online registration is **not** eligible for the discount – you must submit paper registration forms.

**MANUSCRIPTS:**

Manuscripts will be provided to you in one of two options:

1. You may choose the download option (where you receive a link with a password upon successful registration and payment). With this option, you are responsible for downloading the manuscript and either bringing a printed copy with you to Annual or bringing your computer. There will be NO copies available to you at the registration table;
2. You may choose to receive a printed manual upon check in for an additional \$25, which is the price of the manuscripts we sell on our website.

**HOTEL INFORMATION:**

**Room Rates:** Rooms rates are \$119.00 (for a standard room) and \$139.00 (for an oceanfront room), plus tax; deadline for hotel reservations is **February 24, 2015**. When calling to make a reservation, please be sure to designate that you are attending the NCPA Seminar to receive the discounted rate. After the deadline, you are not guaranteed this rate.

**Please make your own hotel reservations:**

**Via telephone:** Please call (910)-256-2231 or 1-877-330-5050 to make your reservation. Be sure to designate that you are attending the NCPA Seminar to receive the group rate. After **February 24<sup>th</sup>**, we cannot guarantee you a room or the group rate.

**On Line:** Go to <http://www.wrightsville.sunspreeresorts.com> and enter the code PAR to receive the group rate.

**DIRECTIONS:**

- |            |   |
|------------|---|
| From I-40  | Exit US 74 East, go approximately 5 miles, cross Intracoastal Waterway Bridge, remain on US 74, turn left on Lumina Avenue, located approx. ½ mile on the right |
| From US 74 | Follow US 74 to US 76; proceed East, cross Intracoastal Waterway Bridge, bear left on US 74, turn left on Lumina Avenue, located approx. ½ mile on the right    |
| From US 76 | Follow US 76 East, cross Intracoastal Waterway Bridge, bear left on US 74, turn left on Lumina Avenue, located approx. ½ mile on the right                      |
| From US 17 | Exit US 74 East, go approximately 5 miles, cross Intracoastal Waterway Bridge, remain on US 74, turn left on Lumina Avenue, located approx. ½ mile on the right |

**FOR MORE INFORMATION, CONTACT**

Beverly K. Moore, NCCP  
1<sup>st</sup> Vice President  
[education@ncparalegal.org](mailto:education@ncparalegal.org) or [bev@tissuelaw.com](mailto:bev@tissuelaw.com)

Michele A. Bryant, CLA, NCCP  
Annual Seminar Co-Chair  
[mtuttle@wakehealth.edu](mailto:mtuttle@wakehealth.edu)

Crystal L. Robinson, NCSB/CP  
Annual Seminar Co-Chair, Patron & Sustaining Chair  
[crystal@levineandstewart.com](mailto:crystal@levineandstewart.com)

Join us in celebrating the North Carolina Paralegal Association, Inc.'s  
35th Annual Meeting & Seminar at the Holiday Inn Resort.

Mail in your registration form today!

**REGISTRATION FORM**

NCPA's 35th Annual Meeting and Seminar  
March 19, 2015 – March 21, 2015 - Holiday Inn Resort, Wrightsville Beach

Registration deadline is March 6, 2015. Please add the late fee if your registration is postmarked on or after this date. Walk-ins are welcome the day of the seminar. Checks should be made payable to NCPA for the total amount of all applicable fees. Your check or credit card statement is your receipt. **We do not send confirmations.** This registration form must be completed and accompany your payment.

Return this form and your payment to:

Chreatha A. Alston, NCCP  
NCPA, Registration Chair  
PO Box 8680  
Greensboro, NC 27419

NAME: \_\_\_\_\_  
(This is how your name will appear on your name tag - please be sure to include any credentials such as CP or NCCP.)

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

TELEPHONE: \_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_

CHECK NO.: \_\_\_\_\_ ENCLOSED: \$ \_\_\_\_\_

Is this your first NCPA Seminar?

\_\_\_\_\_ yes \_\_\_\_\_ no

**CHECK THE CONCURRENT SESSIONS YOU WILL ATTEND:**

Friday, 9:45 a.m.	Session A _____	Session B _____	(choose ONE)
Friday, 11:00 a.m.	Session A _____	Session B _____	(choose ONE)
Saturday, 9:00 a.m.	Session A _____	Session B _____	(choose ONE)
Saturday, 10:15 a.m.	Session A _____	Session B _____	(choose ONE)

**\_\_\_\_\_ CHECK IF YOU WILL ATTEND THE LUNCH & LEARN ON CERTIFICATION****CHECK YOUR MANUSCRIPT PREFERENCE:**

\_\_\_\_\_ Download the manuscript prior to the seminar  
\_\_\_\_\_ Zip drive, which will be received upon check in for an additional \$10.00  
\_\_\_\_\_ Hard copy of Manuscript, which will be received upon check in for an additional \$25.00

**Fees: Check all that apply:**

(Registration fee includes downloaded version of manuscript, Friday breakfast, Friday lunch, Friday evening event and Saturday Continental breakfast):

\_\_\_\_\_ \$ 160.00 NCPA or NALA Member\* (or Affiliate Member Delegate)  
\_\_\_\_\_ \$ 245.00 Non-Member  
\_\_\_\_\_ \$ 65.00 NCPA or NALA Student Member\*  
\_\_\_\_\_ \$ 90.00 Student Non-Member (please include proof of enrollment at a paralegal school)  
\_\_\_\_\_ \$ 125.00 Paralegal Educator  
\_\_\_\_\_ \$ 25.00 Hard copy of Manuscript received at check in  
\_\_\_\_\_ \$ 20.00 Additional Friday Lunch Ticket  
\_\_\_\_\_ \$ 25.00 Additional Friday Dinner Ticket  
\_\_\_\_\_ \$ 20.00 CLA/CP Breakfast (NALA certified CLAs/CPs only - please provide NALA Membership # \_\_\_\_\_)  
\_\_\_\_\_ \$ 20.00 Late Fee (must be included if sending after 3/6/2015)  
\_\_\_\_\_ \$25.00 Manuscript Only (will be mailed after seminar date)

\*If you are not an NCPA member but are a NALA member, please include a copy of your NALA membership card showing your status as an "individual member". Contributions or gifts to the North Carolina Paralegal Association, Inc. are not deductible contributions for federal income tax purposes; however, payments may qualify as ordinary and necessary business expenses.

## NALA NEWS

Mark your calendars for the 40<sup>th</sup> Annual Convention Institutes and Exhibition in Tulsa, Oklahoma! NALA is 40 and we will celebrate this year in Tulsa. See the NALA brochure in this issue for more information and make your plans now to attend!



Paralegal CLE by NALA is now available on iTunes for your iPad and Google Play for your android device! Through this app, you may register or access previously purchased NALA Campus Self-Study programs and Advanced Paralegal Certification courses. Today, there are 32 self-study programs offered by NALA through web-based educational programs. These include:

- 7 Certified Paralegal examination prep courses
- 3 general education courses
- 22 Advanced Paralegal Certification courses

For users of other operating systems, NALA Campus Self-Study courses are on the internet at [www.nala.org](http://www.nala.org). All courses will run on all tablets using the tablet's internet browser.





All of the information about the NALA Convention is available on the NALA JULY 2015 TULSA App, and it is available at the Apple Store and Google play.



**NALA  
PAPERLESS  
CONVENTION!**

**40TH ANNUAL CONVENTION  
INSTITUTES & EXHIBITION  
JULY 22-24, 2015  
TULSA, OK**

**FOUR DECADES STRONG**

**THE NATION'S LARGEST GATHERING OF PARALEGALS**



**THE ASSOCIATION OF  
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## FROM THE PRESIDENT

Visit Tulsa in 2015! During this year's annual convention, we will celebrate NALA's 40th Anniversary – 40 years of providing exceptional continuing legal education, national accredited paralegal certification, advanced specialty certifications, and 40 years of helping to shape the paralegal profession.

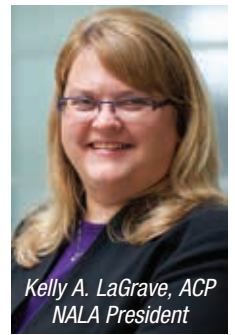
The NALA Continuing Education Council is providing eight exceptional institutes for you this year in the areas of Alternative Dispute Resolution, Corporate Law, Environmental Law, Essential Skills, Immigration Law, Litigation with Emphasis on Government Liability, Medical Malpractice, and Legal Technology. In addition to the Institutes, you will also have the unique opportunity to learn from fellow paralegals during the Member Exchange and from affiliated association members through the Affiliates Exchange, and a presentation from the NALA Leadership (LEAP) class of 2015.

As part of this year's convention, there will be a banquet on Friday evening. This will be a great time to celebrate the paralegal profession

and NALA. The 40th Anniversary Banquet committee has planned a wonderful program and we hope that you will join us for the celebration!

Besides all of the educational opportunities available, you will also have opportunities to network with hundreds of paralegals from across the country. You will find inspiration in their stories, connect with old friends, and make many new friends. The remarkable networking opportunities available will leave you refreshed and renewed.

So please mark your calendar now for July 22-24, 2015 to attend the nation's largest paralegal conference. Please look over this brochure carefully and select the educational sessions that will give you the most benefit. The warmth and hospitality of Tulsa awaits you!



Kelly A. LaGrave, ACP  
NALA President

## TULSA

Tulsa was announced as one of *ConventionSouth* magazine's Best for Hospitality and Charm. Tulsa has a rich oil heritage and features an array of cultural attractions. There are multiple districts downtown that include various restaurants, shopping, live entertainment, and galleries.

Tulsa was originally Native American Territory; however, with the addition of the railroad came more people. The discovery of oil really excelled the growth of Tulsa.

A building boom in the early 20th century gave Tulsa one of the largest concentrations of art deco architecture in the United States. These buildings have created preservation and architectural inter-



est and are a great asset to Tulsa. For more information on Tulsa, Oklahoma please visit <http://www.visittulsa.com/>.

## THE HOTEL

The 2015 NALA Annual Convention will be held at the Hyatt Regency. The hotel is conveniently located in the heart of downtown with easy access to various cultural districts and restaurants. Access to the airport is very convenient and the hotel has a 24 hour shuttle. Rooms feature complementary Internet access, luxurious Portico bath amenities, and refrigerators. Complimentary self-parking is available in the attached parking garage. For more information on the Tulsa Hyatt Regency please visit <http://www.tulsa.hyatt.com>.

Guest room rates for this event are:

\$129 for single/double/triple or \$149 for the Regency Level

Guest room reservations must be confirmed by June 29, 2015. Check in time is 3 pm and check out time is Noon. Individuals departing earlier than scheduled may incur an early departure fee plus tax charge.



**Hyatt Regency Tulsa**  
100 East 2nd Street • Tulsa, OK 74103 • (918) 582-9000

## TABLE OF CONTENTS

Contents.....	Page
Affiliated Associations Annual Meeting.....	4
Affiliates Exchange Presentations .....	4
Annual Membership Forum, Meeting & Awards.....	5
Board of Directors Meetings .....	5
CLE Credit Approval.....	10
Convention Schedule (Chart) .....	14
Alternate Dispute Resolution Institute .....	6
Corporate Law Institute .....	7

Contents.....	Page
Environmental Law Institute.....	7
Essential Skills Institute.....	8
Immigration Law Institute .....	8
Legal Technology Institute.....	9
Litigation with emphasis on Government Liability Institute.....	10
Medical Malpractice Institute .....	11
Member Exchange Presentations.....	12-13





# NALA BUSINESS & SOCIAL EVENTS



## TUESDAY, JULY 21



**Early Bird Registration** ..... 2–6 p.m.

### Welcome, Introductions, and Tips

**Kelly A. LaGrave, ACP**

NALA President

**Nancy L. Jordahl, ACP, FRP**

Continuing Education Council Chair

**Narinda Greene, ACP**

Annual Convention Chair, 2015

**Early Bird Reception** ..... 4–6 p.m.

Take a step back into the 1940's as we celebrate NALA's 40th

Anniversary. This come-as-you-are reception is your opportunity to visit with old friends, break the ice with convention newcomers, and win amazing door prizes! Light hors d'oeuvres and a cash bar will be available.

The following NALA affiliated associations are hosting the early bird reception and contributing to numerous events throughout the convention days (known at press time):

- Legal Assistants of the Western Slope (CO)
- Central Oklahoma Association of Legal Assistants (OK)
- Oklahoma Paralegal Association (OK)
- Tulsa Area Paralegal Association (OK)
- Paralegal Association in Permian Basin (TX)



## WEDNESDAY, JULY 22



**Opening Registration** ..... 8 a.m.–5 p.m.

**Exhibits Open** ..... 8 a.m.–5 p.m.

**Continental Breakfast** ..... 8–9 a.m.

**General Session** ..... 9–9:45 a.m.

### Welcome, Opening Remarks, and Keynote Address

**Kelly A. LaGrave, ACP**, NALA President

**The Honorable Noma D. Gurich**

**Institutes** ..... 10 a.m.–12:30 p.m.

(See Institute details in the Education section.)

**Lunch and Affiliate Discussion** ..... 12:30–1:30 p.m.

A lunch on the go will be offered for all at a minimal cost. See registration form for tickets. More information will be provided to affiliated associations regarding the discussion sessions.

**Vendor Product Demos** ..... 1:45–2:15 p.m.

**Membership Forum** ..... 2:30–4:30 p.m.

Bring your business cards for one-on-one networking, and be prepared to participate in the Candidates' Forum to share ideas and learn about NALA candidates. Candidates will make formal presentations and answer questions from the floor. Discussion will center on the array of NALA programs.

**Opening Night Reception** ..... 5:00–6:30 p.m.

This traditional mixer is always a crowd pleaser and a highlight of convention social events. Here's your chance to meet new people, greet old friends, and visit with exhibitors. Suggested dress: The Seventies



## KEYNOTE ADDRESS



### The Honorable Noma D. Gurich

Justice of the Supreme Court of Oklahoma  
Oklahoma City, OK



Justice Noma D. Gurich was appointed by Governor Brad Henry as only the third woman to serve as Justice of the Supreme Court of Oklahoma and she took office on February 15, 2011.

Justice Gurich has been a member of the judicial branch for 26 years. She served as a District Judge in Oklahoma County for more than 12 years (1998–2011). While serving as a District Judge, Gurich served as the Presiding Judge of both the 11th and 12th Multi-county Grand Juries. She also served as the Presiding Administrative Judge for the Oklahoma County district court for two years. Justice Gurich served as a Judge on the Oklahoma Workers' Compensation for 10 years (1988–98), including a 4 year term as Presiding Judge. Before she began her judicial career, Justice Gurich was a practicing attorney engaged in the private practice of law in Oklahoma City for 10 years.

A native of Indiana, Justice Gurich received her law degree

from the University of Oklahoma, College of Law. She was an editor of the American Indian Law Review and received the Professional Responsibility Award. She is an honorary member of the OU Law Chapter of The Order of the Coif.

Justice Gurich received awards from the Oklahoma County Bar Association (2002) and the Oklahoma Bar Association Women in Law Section (2003). Justice Gurich is a three time Journal Record Honoree for Oklahoma Woman of the Year (2005, 2008, & 2011) and was inducted into the Woman of the Year Circle of Excellence in 2011. She was named the 2011 Judge of the Year from the Oklahoma Chapter of the American Board of Trial Advocates. In 2013, she was honored with a Byliner Award by the Oklahoma City Chapter of the Association of Women in Communications. In March of 2014, Justice Gurich received a Valuable Volunteer Award by the Foundation for Oklahoma City Public Schools.

Justice Gurich is past President of the William J. Holloway, Jr. American Inn of Court (2007–2008) and she continues as a Master member of the Inn. In Oklahoma City, Justice Gurich is active in the Kiwanis Club, Oklahoma School of Science and Mathematics and St. Luke's Methodist Church.



**NALA 2015 TULSA CONVENTION**





**THURSDAY, JULY 23**



**Registration . . . . . 8 a.m.–5 p.m.**

**Polls Open . . . . . 8 a.m.–5 p.m.**

**Exhibits Open . . . . . 8 a.m.–1:30 p.m.**

**Continental Breakfast . . . . . 8–9 a.m.**

**Essential Skills Institute . . . . . 8:30 a.m.–Noon**

**Institutes . . . . . 9 a.m.–Noon**  
(See Institute details in the Education section.)

**All Convention Luncheon . . . . . Noon–1:30 p.m.**

This luncheon is a good time to enjoy talking with other conventioners. Cost of the luncheon is included in your registration fee for the convention. Additional tickets for guests are \$50 each.

**Member Exchange . . . . . 1:45–3:15 p.m.**

**Affiliated Associations Annual Meeting . . . . . 3:30–5 p.m.**

- Election of Affiliated Associations Director and Secretary
- Affiliate Award Presentation

**2015 Affiliates Exchange**  
**Business Partner Sponsorships for your association: How to Get Them and Keep Them!**

**St. Louis Paralegal Association**

**Michelle Caracci**  
*Lashly & Baer, P.C.*  
Saint Louis, MO



**GUEST LUNCHEON SPEAKER**



**Kathy Taylor**  
*Former Tulsa Mayor*  
Tulsa, OK

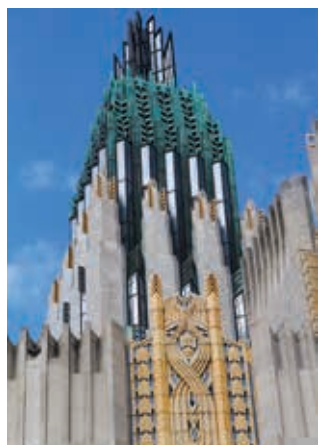
Attorney Kathy Taylor is a native Oklahoman who learned the values of hard work and responsibility early, working her way through the University of Oklahoma after losing both parents shortly after starting college. Known throughout her career as a change agent, as Mayor, she led Tulsa through the worst recession in 70 years, completed the successful BOK Center and led the developing of ONEOK Field. As Oklahoma's Secretary of Commerce and Tourism, she led the team that brought Dell to Oklahoma



and kept American Airlines jobs in Tulsa. As Oklahoma's Chief of Education Strategy and Innovation, she led a bipartisan team, including educators and legislators, to pass needed education reform legislation. She serves on the Board of Directors of Sonic Industries, an Oklahoma-based quick serve restaurant chain. She serves on the national and regional boards of Reading Partners, whose mission is to help children become lifelong readers by empowering communities to provide individualized instruction with measurable results. She also serves on the Board of Oklahoma Heritage Association.



**Special Needs**—Be sure to note on your registration form any dietary or special accommodation requirements so that your needs can be met at convention activities.



### **ART DECO WALKING TOUR**

**Thurs., July 23, 4:30/5:00/5:30 pm.**

Tulsa has one of the largest collections of art deco buildings and to celebrate that you can take a Downtown Tulsa one hour walking tour full of Art Deco, History and many stories that bring Tulsa to life! Please pre-register if you want to join in this wonderful opportunity. Guided by Tours of Tulsa.

## **FREE TOURS**



**Oklahoma Jazz Hall of Fame**—Honors jazz, blues and gospel musicians in the state of Oklahoma.



**Gilcrease Museum**—It has the world's largest and more comprehensive collection of art of the American West. The museum also offers an unparalleled collection of Native American art and artifacts, as well as historical manuscripts, documents and maps.







## FRIDAY, JULY 24



### Annual Meeting of the 2014–15

**NALA Board of Directors** . . . . . 7:30–8:30 a.m.  
Members of NALA are welcome at this meeting.

**Registration** . . . . . 8–9 a.m.

**Continental Breakfast** . . . . . 8–9 a.m.

**Polls Open** . . . . . 8 a.m.–12:30 p.m.

**Affiliated Associations Exhibits** . . . . . 8 a.m.–2 p.m.

Don't miss this opportunity to see what NALA Affiliated Associations around the nation are doing to promote the profession and grow their organizations. The displays are staffed by members who are eager to answer questions and offer suggestions that you will find helpful.

**Essential Skills Institute** . . . . . 8:30 a.m.–Noon

**Other Institutes** . . . . . 9 a.m.–Noon  
(See Institute details in the Education section.)

**Lunch on Your Own** . . . . . Noon–1:30 p.m.

### 40th Annual Meeting & Awards . . . 1:30–5 p.m.

#### • Business Meeting

The strength of NALA lies with members who take an active interest in the goals, direction, and programs that serve the interests of the profession and the association's membership. This meeting will provide information about NALA's future and results of the election will be announced.

#### • Awards

The Founders' Award, NALA's highest honor, and the Presidents' Award will be presented at this event. Individuals chosen for these awards are recognized for extraordinary personal achievements and contributions to the paralegal profession.

Awards to be presented during the 40th Annual Membership Meeting are:

- Affiliated Associations Outstanding Achievement Award
- National Affiliated Associations Achievement Award
- NALA Presidents' Award
- NALA Founders' Award

#### • LEAP

Presentation by one of the 2014–15 LEAP teams.

### Reception and Installation of Officers . . . . . 5:30–6:30 p.m.

Festivities will feature live entertainment, light *hors d'oeuvres*, and installation of officers for 2015–16. This is your opportunity to honor outstanding members of the paralegal profession and celebrate the high level of professionalism and performance demonstrated by recipients of the awards.



## 2015 CELEBRATION BANQUET



### Celebration Banquet . . . . . 6:30–8 p.m.

Join us for the 2015 Celebration Banquet. The concluding event of the 2015 convention will celebrate NALA's 40 years and 40 years of growth and development of the paralegal profession. Master of Ceremonies, Glenn Leier, Esq., will introduce special presentations from NALA Past President, Vicki Kunz, ACP and Tulsa attorney James J. Proszek, Esq. The banquet program also includes a tribute to retiring NALA Executive Director, Marge Dover, CAE.

This event is sponsored in part by Tulsa law firm Hall Estill, in honor of charter president Jane Terhune and paralegals of the firm, past and present.



Attire: Appropriate attire suggested. Please consider incorporating ruby red, the color of the 40th anniversary.

## FREE TOURS



### THOMAS GILCREASE MUSEUM

Gilcrease will allow free entrance during the NALA convention to attendees wearing their badges. The museum has the world's largest and more comprehensive collection of art of the American West. The museum also offers an unparalleled collection of Native American art and artifacts, as well as historical manuscripts, documents and maps.





# THE INSTITUTES



## ALTERNATIVE DISPUTE RESOLUTION

Topics and subjects listed under each day are subject to change.

Wednesday, July 22 .....10:00 am - 12:30 pm  
 Thursday, July 23 ..... 9:00 am - Noon  
 Friday, July 24 ..... 9:00 am - Noon

**Joseph H. Paulk, Mediator, Attorney**  
 Dispute Resolution Consultants, Inc.  
 Tulsa, OK

The purpose of this institute is to educate legal professionals on the different aspects of Alternative Dispute Resolution. This institute will show the different ways disputes can be resolved and what it takes to get to the table as well as what to do once you get there. This institute will review how the ADR options differ and how to determine which option you choose or how to determine whether you get to choose or the choice is made for you according to existing agreements or contracts.

Joseph Paulk brings a unique range of experience — successful trial lawyer, resourceful mediator, energetic law school instructor, national author and lecturer — to all his endeavors. As a trial lawyer in more than 100 jury trials over 20 years, he represented both plaintiffs and defendants in all types of disputes. Nineteen years ago, he began to transfer this experience to the emerging field of dispute mediation. Since 1992, he has mediated over 3,500 cases in 12 different states. His company, Dispute Resolution Consultants, Inc., is now one of the preeminent mediation firms in the Southwest, with offices and mediators in Tulsa and Oklahoma City.



### Additional Speakers:



**Justice Daniel J. Boudreau (ret.)**  
 Dispute Resolution Consultants, Inc.  
 Tulsa, OK



**Judge Edward C. Cunningham (ret.)**  
 Dispute Resolution Consultants, Inc.  
 Oklahoma City, OK



**The Honorable Judge Gregory K. Frizzell**  
 United States District Court,  
 Northern District of Oklahoma  
 Tulsa, OK



**Moura A.J. Robertson,**  
 Attorney  
 Robertson  
 Cornell  
 Tulsa, OK



**Judge Vicki L. Robertson (ret.)**  
 Dispute Resolution Consultants, Inc.  
 Oklahoma City, OK



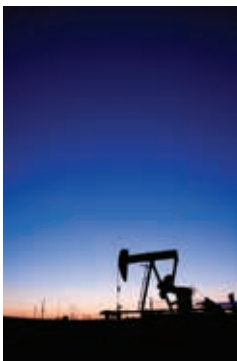
**John D. Rothman,**  
 Attorney  
 Dispute Resolution Consultants, Inc.  
 Tulsa, OK



**Attire** — Tulsa weather in July is mid 90s; however, sweaters and jackets would be appropriate for chilly meeting rooms. Smart casual or business casual attire is favored for convention activities, including the awards celebration. Comfortable walking shoes are a must.



**Philbrook Museum of Art** — Exhibits more than 8,500 works of art at the original location and now boasts a second location downtown, featuring contemporary art. The museum has 23 acres of exquisite English gardens.





# THE INSTITUTES

## CORPORATE LAW

Topics and subjects listed under each day are subject to change.

Wednesday, July 22 ..... 10:00 am - 12:30 pm

Thursday, July 23 ..... 9:00 am - Noon

Friday, July 24 ..... 9:00 am - Noon

**Stacey Bowers, J.D., M.L.I.S.**

University of Denver - Westminster Law Library  
Denver, CO

**Nanci L. Lilja, ACP**

CHS, Inc.  
Inver Grove Heights, MN

Corporate law covers many issues ranging from the formation of business entities to the on-going operations of a company. This institute will cover a broad array of topics that corporate paralegals may encounter. Day One of the institute will address the various types of business entities and how those entities are formed with a particular focus on limited liability companies and the operating agreement. Day Two will focus on how to read and understand financial statements, including a discussion of the auditor's role and the relationship between the auditor and attorney. Additionally, this day will provide an overview of the due diligence process in a merger and acquisition setting. The final day of the institute will discuss employment issues in the workplace, as well as provide a primer on contract drafting skills. This institute is for all levels of paralegals. Come ready to participate.

Stacey Bowers is a Lecturer in the Corporate and Commercial Law Program at the University of Denver Sturm College of Law. She teaches Corporate Drafting, Accounting for Lawyers, and How to Read and Understand Public Company Financial Statements.



Nanci Lilja is the Director of Legal Operations for CHS Inc., a Fortune 100 global agribusiness where she has been employed for the last 35 years. In her current role, she is responsible for management of the paralegal staff, strategic planning and administrative management of client services, structure and integration of international offices, and development of policies, procedures, and work processes to facilitate legal operations across the company.



**Annual Meeting**—The annual meeting is the only opportunity that members have all year to participate directly in decisions affecting the future of NALA. Our future is in your hands.



# THE INSTITUTES

## ENVIRONMENTAL LAW

Topics and subjects listed under each day are subject to change.

Wednesday, July 22 ..... 10:00 am - 12:30 pm

Thursday, July 23 ..... 9:00 am - Noon

Friday, July 24 ..... 9:00 am - Noon

**Peter J. McGrath, Jr., Attorney**

Moore & Van Allen  
Charlotte, NC

Students will learn the fundamentals of environmental rights, responsibilities and liabilities under statutory, regulatory and common law. The institute will examine the structure of environmental regulation in the United States, and provide an overview of specific areas of regulation. Students will examine specific topics including (1) Environmental Governance; (2) Brownfields, Vapor Intrusion, and Hydraulic Fracturing; (3) Sustainability basics; (4) Water Rights Issues in Oklahoma and Texas; (5) Clean Water Act, Safe Drinking Water Act and Clean Air Act (6) Keystone XL

Pipeline Project; (7) Reviewing Phase I and Phase II Reports for Environmental Issues; and (8) *Burlington Northern v. US*. The institute will review the ways attorneys and paralegals provide counsel to clients in each of these areas.

A frequent lecturer and author on diverse environmental issues, Peter McGrath brings to his wide-ranging clients extensive counseling and litigation experience with environmental issues arising in business and real estate transactions.



### Brookside—

Brookside is filled with quaint boutiques, art galleries, antique shops and trendy restaurants.

**JUNE 11**

**Convention Orientation Webinar**—Get details of convention activities, what to expect during the meetings, and answers to questions you may have about your participation. Scheduled for noon (Central Time) Thursday, June 11. Visit the NALA Web site for a link to registration.





## 2014 – 2015 NCPA Officers, Directors & Committee Chairs

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Historian	Catrina Mitchell		Catrina.Mitchell@durhamnc.gov
	Sarah Burt Timmel, NCCP	(919) 593-4084	stimmel@nc.rr.com
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