



2021 February Finale CLE

February 22–26



Event Schedule and Full Agenda



Business Valuation for Family Lawyers

Monday, February 22, 2021
Live Webcast

North Carolina: 3.00 MCLE Hours

Qualifies for NC State Bar Family Law Specialization

Planned by the NCBA CLE Department

Monday, February 22, 2021 | 8:55 AM – 12:20 PM

8:55 Welcome and Introductions

9:00 Business Valuation for Family Lawyers

Ensley

Valuing the family business for equitable distribution is a complex matter. Dwight Ensley takes us through the business valuation process for equitable distribution, from information gathering to more complex topics such as active versus passive appreciation, double dipping and COVID-19 issues. This presentation includes relevant equitable distribution North Carolina statutes and cases.

(This program includes two 10-minute breaks.)

12:20 Adjourn

Speaker

- Dwight A. Ensley, ValuePointe.biz, Greensboro



State and Federal Energy Policy Within a Regulatory Environment

Monday, February 22, 2021
Live Webcast

North Carolina: 3.00 MCLE Hours

Planned by the NCBA CLE Department

Monday, February 22, 2021 | 12:55 – 4:20 PM

12:55 Welcome and Introductions

**1:00 North Carolina Clean Energy Policy and Regulatory Implementation After House Bill 589
Cummings and Smith**

House Bill 589 was major comprehensive state energy legislation passed in 2017. In this session, we discuss the transition to a request for proposals (RFP) process to procure utility-scale solar in North Carolina under the Competitive Procurement of Renewable Energy Program, as well as options for large customers to procure renewable energy pursuant to the Green Source Advantage Program, community solar, solar leasing for customers and a rebate program to incentivize solar adoption across the state. Also learn what issues and challenges remain in the implementation of the legislation as renewable energy grows in the state.

2:00 Break

**2:10 Federal Energy and Environmental Law Developments
Dennis**

The Biden administration is expected to bring dramatic and sweeping changes to the nation's energy and environmental laws and policies. Biden's campaign platform included major commitments to fully decarbonize the electricity grid by 2035, reduce greenhouse gas emissions from the transportation sector, and make major federal investments in advanced energy and transportation technologies. The new administration's efforts to follow through on these commitments will involve not just proposals for new legislation in Congress, but also new regulations and new approaches to implementing existing laws like the Federal Power Act and the Clean Air Act, as well as litigation to defend these regulatory efforts and reverse the Trump administration's environmental rollbacks. This session provides an update on energy and environmental law developments in the first month of the new administration, and looks ahead, with a focus on the regulatory initiatives that key agencies like the Federal Energy Regulatory Commission (FERC) and the Environmental Protection Agency (EPA) are expected to pursue.

3:10 Break

3:20 Making Access to Essential Public Utility Service Truly Universal: A Practical Look at Energy Equity and Justice

Neal

Public utilities have the obligation to serve all customers within their exclusive service territory. But what happens when a family cannot afford the power bill? Before the COVID-19 pandemic, the imposition of late fees and disconnections for nonpayment were routine. Families living at or near the poverty line face daunting challenges affording utilities along with other essentials like rent, food and transportation. The number of households with unsustainable energy burdens far outstrip available resources for bill-payment assistance or bill-saving energy efficiency upgrades. In this session, we consider options for making electric utility service affordable to all under the existing North Carolina regulatory framework.

4:20 Adjourn

Speakers

- Layla Cummings, North Carolina Utilities Commission – Public Staff, Raleigh
- Jeffery S. “Jeff” Dennis, Advanced Energy Economy, Washington, DC
- David L. Neal, Southern Environmental Law Center, Chapel Hill
- Benjamin W. “Ben” Smith, North Carolina Sustainable Energy Association, Raleigh

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Collaborative Family Law: Good for Clients, Good for Lawyers. A Practical Guide to Peaceful Divorce Resolution

Tuesday, February 23, 2021
Live Webcast

North Carolina: 3.00 MCLE Hours

Qualifies for NC State Bar Family Law Specialization

Planned by the NCBA CLE Department

Tuesday, February 23, 2021 | 8:55 AM – 12:20 PM

8:55 Welcome and Introductions

9:00 Collaborative Family Law: Good for Clients, Good for Lawyers. A Practical Guide to Peaceful Divorce Resolution
McIntyre and Quallen

Collaborative divorce has been around since the 1990s and while it grows in popularity each year, it's still very niche. It goes against the grain of traditional legal practice and adversarial negotiation methods, finding a new way to serve clients and opening up what advocacy can mean. In this program, Nicole Quallen and Sarah McIntyre of Two Families Law lead you through the nuts and bolts of what collaborative law is, and then they tackle the tougher question of how to make it successful.

Explore relevant statutes, “the pledge,” non-violent communication, client management, the tension (or not!) between advocacy and collaboration, and some of the ways collaborative practice is used beyond family law. In addition to exploring how this approach can be helpful for clients, learn how collaborative law can be a healthy and sustainable practice for attorneys.

(This program includes two 10-minute breaks.)

12:20 Adjourn

Speakers

- Sarah Hill McIntyre, Two Families Law, Durham
- Nicole M. Quallen, Two Families Law, Durham

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An Introduction to Basic Tax Controversy and Accounting: When to Call In Someone Else

Tuesday, February 23, 2021
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12:55 Welcome and Introductions

**1:00 An Introduction to Basic Tax Controversy and Accounting: When to Call In Someone Else
Thacker**

This program provides basic information relating to state and federal tax authority letters and accounting. The speaker discusses tax letters your client may receive from the IRS or state authorities and how to handle them yourself (if possible) or turn them over to another professional. We also review the absolute rules every lawyer should know about when it comes to accounting in order to understand your clients' finances — whether individual or business.

(This program includes two 10-minute breaks.)

4:20 Adjourn

Speaker

- Sarah K. Thacker, Thacker Law Firm PLLC, Cary



Stepping It Up: Taking Your Legal Writing From Good to Great

Wednesday, February 24, 2021
Live Webcast

North Carolina: 3.00 MCLE Hours

Planned by the NCBA CLE Department

Wednesday, February 24, 2021 | 8:55 AM – 12:20 PM

8:55 Welcome and Introductions

**9:00 Stepping It Up: Taking Your Legal Writing From Good to Great
Graham**

In this interactive program, Professor Graham shares practical strategies for enhancing the quality of your legal writing. Be encouraged to put yourself in the shoes of your legal reader and learn how you can better meet that reader's needs and expectations in the areas of structure, style, mechanics and format.

In addition, receive tips on making your writing flow smoothly, read clearly and speak powerfully. Finally, learn specific ways to edit and proofread your writing more carefully.

(This program includes two 10-minute breaks.)

12:20 Adjourn

Speaker

- Laura P. Graham, Wake Forest University School of Law, Winston-Salem



Practicing Animal Law: An Overview of Federal, State and Local Laws That Govern Man's Best Friend and Other Creatures

Wednesday, February 24, 2021
Live Webcast

North Carolina: 3.00 MCLE Hours

Planned by the NCBA CLE Department

Wednesday, February 24, 2021 | 12:55 – 4:20 PM

12:55 Welcome and Introductions

1:00 Practicing Animal Law: An Overview of Federal, State and Local Laws That Govern Man's Best Friend and Other Creatures

Mehaffey

Animal law in and of itself is not one single specialty, but rather touches upon a variety of legal arenas that intertwine, such as contracts and torts, real estate and the Fair Housing Act, and property rights under the Right to Farm Act versus the right to quiet enjoyment. Attorneys are often presented with a jumble of facts to decipher and pinpoint the legal issue and desired resolution.

This program provides an overview of animal law across the federal, state and local jurisdictions to assist attorneys who wish to practice animal law in recognizing the issues and appropriate avenues to resolutions through an overview of the law, study of cases and examples of real-life scenarios.

(This program includes two 10-minute breaks.)

4:20 Adjourn

Speaker

- Heidi M. Mehaffey, Mehaffey PA, Plantation, FL



OUTLaw: A Moderated Panel Discussion on Serving the Needs of LGBTQIA+ Clients and Families

Thursday, February 25, 2021
Live Webcast

North Carolina: 3.00 MCLE Hours

Qualifies for NC State Bar Family Law Specialization

Planned by the NCBA CLE Department

Thursday, February 25, 2021 | 8:55 AM – 12:20 PM

8:55 Welcome and Introductions

**9:00 OUTLaw: A Moderated Panel Discussion on Serving the Needs of LGBTQIA+ Clients and Families
Julyan, King, Tharrington, Vetter and Weidemann**

This panel discussion features family law and estate planning practitioners who offer insights and practice tips on serving the needs of LGBTQIA+ clients and their families.

Topics addressed include tips for achieving equality and inclusivity in your office and interactions with clients, marketing to the LGBTQIA+ community, and substantive topics for serving LGBTQIA+ clients in family law and estate planning matters.

(This program includes two 10-minute breaks.)

12:20 Adjourn

Speakers

- Michelle A. “MJ” Julyan, Julyan Law Firm PLLC, Raleigh
- Katie Hardersen King, Wake Family Law Group, Raleigh
- Jennifer S. “Jen” Tharrington, Village Law Group, Chapel Hill
- Connie J. Vetter, Connie J. Vetter Attorney at Law PLLC, Charlotte
- Bradley J. Weidemann, Weidemann Law Firm PC, Winston-Salem



Civil Procedure Best Practices in 2021

Thursday, February 25, 2021
Live Webcast

North Carolina: 3.00 MCLE Hours

Planned by the NCBA CLE Department

Thursday, February 25, 2021 | 12:55 – 4:10 PM

12:55 Welcome and Introductions

1:00 Common Civil Procedure Issues in Litigation

Rothrock

Designed for practitioners of all levels of experience, this session covers the mechanics of the most commonly used Rules of Civil Procedure dealing with pleadings, service, interrogatories, requests for admission, requests for production, depositions and more. Explore common issues concerning the operation of the rules and how to avoid potential pitfalls, as well as the practical implications of COVID-19 on the operation of several rules.

2:30 Break

2:40 Best Practices and Current Developments in Civil Practice

Judge Baddour, Clare, Conner, Myers and Nichols

This panel provides insights on best practices generally and tips on how to navigate virtual proceedings during COVID-19. Also, hear updates on the latest in the court system and what the future may hold.

4:10 Adjourn

Speakers

- Judge R. Allen Baddour Jr., North Carolina Superior Court, Pittsboro
- Jacqueline R. “Jackie” Clare, Jacqueline R. Clare Attorney at Law, Raleigh
- Richard H. “Rick” Conner III, McGuireWoods LLP, Charlotte
- Kellie Z. Myers, Trial Court Administrator’s Office, Raleigh
- Christopher R. “Chris” Nichols, Nichols Law Firm, Raleigh
- Michael S. “Mike” Rothrock, Hedrick Gardner Kincheloe & Garofalo LLP, Raleigh



Mastering the Manipulation of PDF Documents

Friday, February 26, 2021
Live Webcast

North Carolina: 3.00 MCLE Hours

Includes:

3.00 Technology Training

Planned by the NCBA CLE Department

Friday, February 26, 2021 | 8:55 AM – 12:20 PM

8:55 Welcome and Introductions

**9:00 Mastering the Manipulation of PDF Documents[‡]
Reach**

PDFs are the lingua franca of electronic documents. Lawyers use them for sharing information, e-filing, collecting data, creating archival documents, electronic discovery, paperless office protocols and much more. In this program, discover all the tools and tips necessary to be a PDF pro.

Learning objectives include basics of PDF creation, locking down and securing files, using Acrobat for e-signatures and review, preparing documents for e-filing (including redaction and finding aids), creating and filling out PDF forms, and more. We also explore alternatives to Acrobat and the pros and cons of different paid applications to help you master your use of the tools that help you leverage PDFs in your practice.

(This program includes two 10-minute breaks.)

12:20 Adjourn

[‡] Indicates portion providing Technology Training credit

Speaker

- Catherine Sanders Reach, North Carolina Bar Association, Cary



Practicing Civility, Keeping Your Data Secure and Staying Sane During COVID

(Ethics, Technology and SA/MH)

Friday, February 26, 2021
Live Webcast

North Carolina: 3.00 MCLE Hours

Includes:

2.00 Ethics/Professional Responsibility

1.00 Substance Abuse/Mental Health

1.00 Technology Training

Planned by the NCBA CLE Department

Friday, February 26, 2021 | 12:55 – 4:20 PM

12:55 Welcome and Introductions

1:00 Should We Be Nice? A Discussion on Civility and Professionalism*

Havel

We're taught to use the rules of civil procedure, criminal procedure and evidence to gain every tactical advantage we can in pursuit of prevailing in a case. It's a game and the best player wins. But how does winning the game affect our relationships with our colleagues? Equally important, how does a tactical and strategic win affect the relationship between the parties we are representing? This program focuses on the ethics of being civil and professional while modeling good behavior, repairing relationships and still advocating for our clients.

2:00 Break

2:10 Best Mental Health Practices in a COVID-19 Environment†

Ellington and Hicks

COVID-19 has remade the practice of law and created new mental health stresses for practitioners. Help is on the way.

3:10 Break

3:20 Data Security: Tricks Used by the Bad Guys and Your Tools to Counteract**

Lorenz

This session focuses on best practices in cybersecurity for lawyers. Starting off with a foundation in the rules of professional ethics and why knowing how to secure data in the digital age is important for lawyers, we then cover a number of best practices that are generally applicable to lawyers, ranging from solo practitioners to attorneys in large firms.

Citing recent examples of breaches, also learn about social engineering attacks as well as why, in view of the SolarWinds breach, vendor security is a crucial component of data security in a law firm.

4:20 Adjourn

* Indicates portion providing Ethics/Professional Responsibility credit

† Indicates portion providing Substance Abuse/Mental Health credit

‡ Indicates portion providing Technology Training credit

Speakers

- Nicole “Nicki” Ellington, North Carolina Lawyer Assistance Program, Raleigh
- Aida Doss Havel, Law Office of Aida Doss Havel, Rodanthe
- Richard E. Hicks, Ph.D., HRC Behavioral Health & Psychiatry PA, Chapel Hill
- Eva Lorenz, Agio, Morrisville

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