



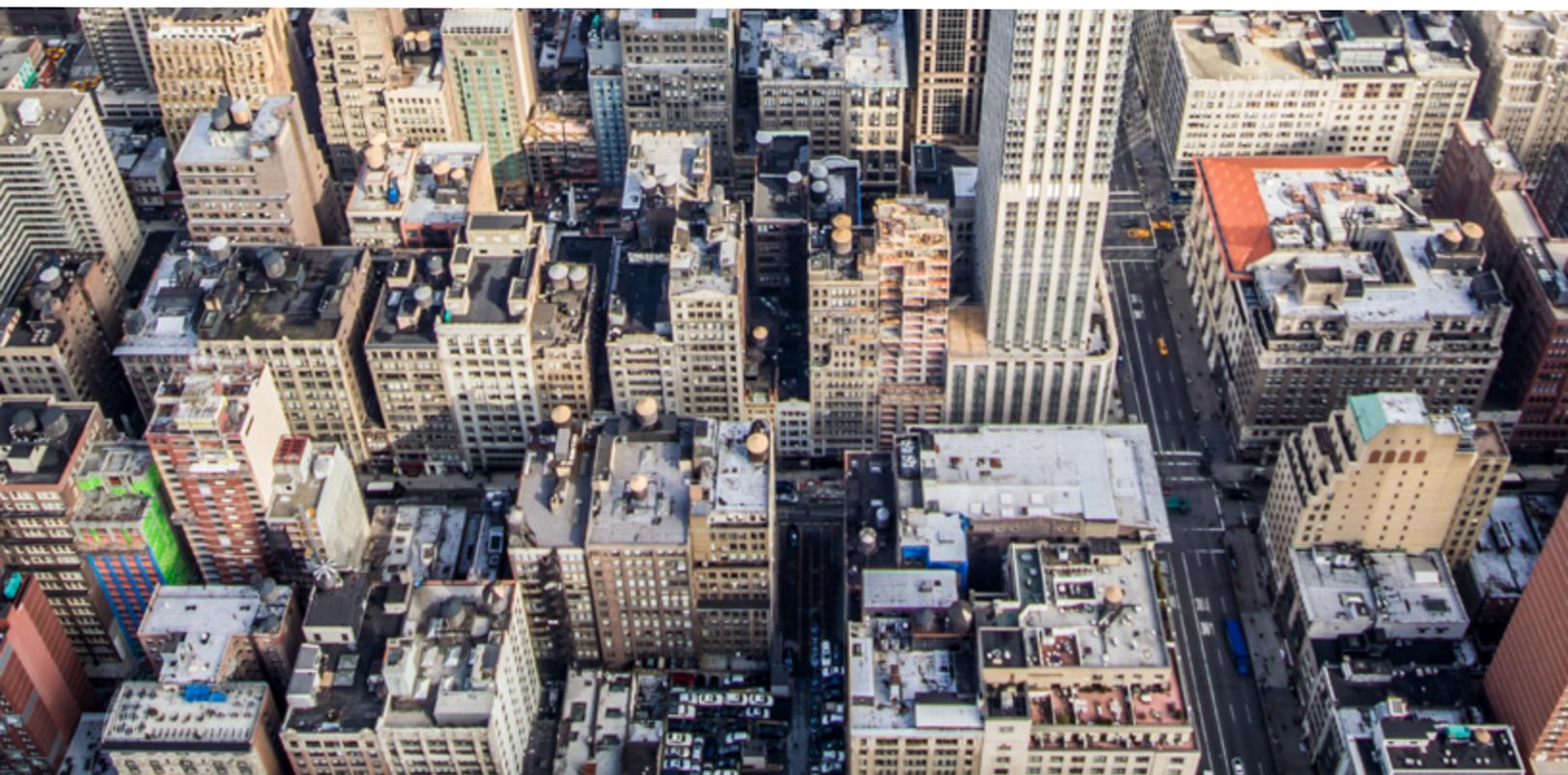
# FALL 2018 PROGRAM CATALOG

**LIVE PROGRAMS & WEBCASTS**

September | October | November | December

**NEW YORK  
CITY BAR**

[nycbar.org/cle](http://nycbar.org/cle)



# TABLE OF CONTENTS

## ADR

Effective Mediation Advocacy: Skills and Strategies for Litigators .....	04
---	----

## Art Law

Hot Topics in Art Law 2018 .....	05
----------------------------------	----

## Bridge-the-Gap

16-Hour Bridge-the-Gap: Practical Skills, Ethics & More .....	06
--	----

New Jersey Bridge-The-Gap: Satisfy the Mandatory 15 Credits and More .....	07
---	----

## Business Law

Business Law for Lawyers .....	08
--------------------------------	----

How to Read and Understand a Financial Statement and Tax Return .....	45
--	----

New Age Leasing: Shared Workspaces, Foodhalls, and Pop-up Stores .....	39
---	----

Transactional Lawyering: Basic Skills .....	09
---	----

## Communication

Efficient, Effective and Powerful Legal Writing.....	12
---	----

Fearless Public Speaking for Lawyers .....	11
--	----

## Compliance

Corporate Governance & Controls: Minimizing Risks.....	13
---	----

## Consumer Affairs

Hot Topics in Advertising & Marketing Law .....	14
---	----

## Corporate & Securities

A Practical Guide to LLCs .....	10
---------------------------------	----

Corporate Counsel Symposium: Advising Through Partnering .....	16
---	----

Corporate Governance & Controls: Minimizing Risks.....	13
---	----

Data Usage Law: Monetizing Data & Privacy Issues .....	15
---	----

Ethical Considerations for Corporate Investigations: Views from All Sides .....	21
--	----

## Criminal Law

New York Criminal Law Practice 101 .....	17
--	----

## Elder Law

Estate Planning Strategies: The Top Ten List .....	47
--	----

Retirement Planning: Preparing Your Clients (and Yourself!) .....	18
--	----

## Ethics

Attorney Discipline: Reflections from the Presiding Justices, Clerks of Court, and Department Chiefs on the Critical Changes in Procedure and Recent Decisions .....	20
---	----

Current Legal Ethical Issues with Professor Stephen Gillers .....	22
--	----

Ethical Considerations for Corporate Investigations: Views from All Sides .....	21
--	----

Ethical Issues for In-House Counsel: Transactional Aspects .....	23
---	----

Lights, Camera, Ethics!: Why Your Favorite Movie Lawyers May Need an Ethics Lawyer .....	24
--	----

Social Media and the Practice of Law: Ethical Implications and a How-To Guide for Social Media .....	19
--	----

The Scope of Attorney-Client Privilege .....	25
--	----

## Family Law

Effective Drafting of Matrimonial & Family Agreements .....	26
--	----

Estate Planning Strategies: The Top Ten List .....	47
--	----

Retirement Planning: Preparing Your Clients (and Yourself!) .....	18
--	----

Whose Child is This?: The Impact of Artificial Reproductive Technology in Matrimonial and Trusts/Estates Law .....	27
--	----

## Information Technology/Cyber Law

A Practical Introduction to Smart Contracts and Their Technology .....	28
---	----

Data Usage Law: Monetizing Data & Privacy Issues .....	15
---	----

# TABLE OF CONTENTS

## Labor & Employment

Employee Dismissals: Avoiding the Pitfalls .....	29
Epic Supreme Court Rulings in Labor & Employment Law .....	30
FLSA Math: How to Calculate Wage-Related Damages .....	31
Sexual Harassment Summit: Perspectives and Best Practices in the Wake of #MeToo .....	32

## Litigation

CPLR Update 2018 .....	34
Effective Mediation Advocacy: Skills and Strategies for Litigators .....	04
Hot Topics in Art Law 2018 .....	05
New York Criminal Law Practice 101 .....	17
Practicing in New York State Supreme Court ....	33
The Scope of Attorney-Client Privilege .....	25
Trials of the Century - Part II .....	35

## Nonprofit Law

Hot Topics in Not-for-Profit Law .....	36
--	----

## Real Estate

Hot Topics Affecting Cooperative & Condominiums: Cases & Marketplace Developments in the Last Six Months .....	38
New Age Leasing: Shared Workspaces, Foodhalls, and Pop-up Stores .....	39
Ownership of Cooperative Apartments and Condominiums by Trusts: An Overview of Popular Trusts and Obtaining Transfer Approval from Cooperative Boards .....	48
Residential Real Estate Closings: What You Need to Know From Pre-Contract to Closing .....	37
The Do's and Don't's of Zoning Lot Mergers and Development Rights Transfers in New York City .....	40

## Small Law Firm

Consultants, Third Party Providers, Other Attorneys & In-House Staff and Systems: Vital Outside Relationships and Inside Muscle to Support the Small Law Firm Practitioner .....	42
Optimizing Client Intake and the Initial Client Relationship: Critical Early Small Law Firm Management Issues .....	43
Small Law Firm Practice Management Challenges & Solutions .....	41

## Tax & Accounting

How to Read and Understand a Financial Statement and Tax Return .....	45
Tax Planning Under the Tax Cuts and Job Acts of 2017 .....	44

## Trusts & Estates

Estate Planning Strategies: The Top Ten List .....	47
Hail to the Chiefs: Practical Aspects of NYS Surrogate's Court Procedure From the Chief Clerks .....	46
Ownership of Cooperative Apartments and Condominiums by Trusts: An Overview of Popular Trusts and Obtaining Transfer Approval from Cooperative Boards ....	48
Retirement Planning: Preparing Your Clients (and Yourself!) .....	18
Whose Child is This?: The Impact of Artificial Reproductive Technology in Matrimonial and Trusts/ Estates Law .....	27

**NEW Effective Mediation Advocacy:  
Skills and Strategies for Litigators**

**Thursday, December 6, 2018 | 6:00 p.m. - 8:00 p.m.**

**NY CLE Credit: 2.0 Skills**

**Live Program & Webcast: \$149 for Members | \$249 for Nonmembers**

**Small Law Firm: \$79 for Members**

This seminar will teach you how to effectively represent your clients at mediation. Litigators who come to a mediation with the primary goal of convincing their adversary, or the mediator, that their client is “right” tend to miss many of the opportunities mediation presents. Effective advocacy in mediation requires much more than persuasive legal argument. It requires an understanding of the objectives of mediation, familiarity with the mediation process, and well-honed negotiation skills. In this course, litigators will learn the “inside” view, from the perspective of a mediator and ex-litigator, about how to be an effective advocate at each stage of the mediation process. The topics you will explore include: the decision whether and when to mediate; selecting a mediator (e.g., mediator style; background); approaching pre-mediation calls with the mediator; the opportunities and pitfalls of the “joint session”; deploying negotiation skills at the bargaining table; working productively with the mediator; ethical dilemmas in mediation; and the importance of “follow-up” when the parties are unable reach a settlement at the mediation session.

**Program Instructor:**

Marc Isserles | Mediator and Arbitrator, JAMS

**Sponsoring Association Committee:**

Alternative Dispute Resolution Committee | Charles M. Newman, Chair

## Hot Topics in Art Law 2018

**Tuesday, October 30, 2018 | 6:00 p.m. - 8:00 p.m.**

**NY CLE Credit:** 2.0 Professional Practice

**Live Program & Webcast:** \$149 for Members | \$249 for Nonmembers

**Small Law Firm:** \$79 for Members

At this program a panel of experienced practitioners will cover some of the hot button legal issues affecting the art world today. This program is intended for those who practice art law, litigation and trust and estates law, as well as those with clients in the art industry, and business executives in the art industry.

### **Program Chair and Moderator:**

Steven R. Schindler | Schindler Cohen & Hochman LLP

### **Sponsoring Association Committee:**

Art Law Committee | Steven R. Schindler, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

# BRIDGE-THE-GAP

## 16-Hour Bridge-the-Gap: Practical Skills, Ethics & More...

Tuesday, September 25, 2018 | 9:00 a.m. - 4:00 p.m. &

Tuesday, October 2, 2018 | 8:45 a.m. - 5:45 p.m.

**NY CLE Credit (Both Days):** 16.0 total: 7.0 Professional Practice, 6.0 Skills, 3.0 Ethics

**NY CLE Credit (September 25):** 7.0 Professional Practice

**NY CLE Credit (October 2):** 9.0 total: 6.0 Skills, 3.0 Ethics

**Live Program & Webcast (Both Days):** \$499 for Members | \$699 for Nonmembers

**Live Program & Webcast (Per Day):** \$399 for Members | \$599 for Nonmembers

**Recent Law Graduates (not yet admitted) & Newly Admitted Lawyers (admitted less than 2 years) (Both Days):** Free for Members

Earn all of your annual CLE credits while obtaining invaluable knowledge on a variety of areas. Our Bridge-the-Gap programs fulfill a full year's credit requirements for those who are newly admitted, while providing essential information and credits for more experienced attorneys. This program is particularly distinct in that one day will allow attendees to fulfill all required ethics and skills credits. Attendance on both days will provide the total professional practice required of all newly admitted attorneys. A skilled faculty will guide you through the day-to-day practice of law and cover topics of interest to all attorneys, including legal ethics. Each Bridge-the-Gap program contains updated content and will provide CLE credit to all attendees, even if they attended in the past.

In addition to the live program, each day of this Bridge-the-Gap program will be available as a webcast. Experienced attorneys may therefore choose to attend live or by webcast. Newly admitted attorneys must attend the live program in order to receive skills credits; therefore newly admitted attorneys should register to attend live. For further information on the CLE rules and requirements for newly admitted attorneys, please visit <http://www.nycourts.gov/Attorneys/CLE/>

**Save by registering for both days!**

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

**LIVE ONLY!** New Jersey Bridge-The-Gap:

Satisfy the Mandatory 15 Credits and More

**Wednesdays, November 28 & December 5, 2018 | 9:00 a.m. - 5:00 p.m.**

**NJ CLE Credit (Both Days): 16.0 total (Breakdown TBD)**

**NJ CLE Credit (Per Day): 8.0 total (Breakdown TBD)**

**Live Program (Both Days): \$499 for Members | \$699 for Nonmembers**

**Live Program (Per Day): \$399 for Members | \$499 for Nonmembers**

**Recent Law Graduates (not yet admitted) & Newly Admitted Lawyers (admitted less than 2 years) (Both Days): Free for Members**

This program will provide essential information from a skilled faculty that will guide you through the day-to-day practice of law. Topics in required practice areas will include eight of the nine specified subject areas (basic estate planning, law practice management, family, real estate closing, municipal court practice, civil, criminal and landlord/tenant practice) required of newly admitted New Jersey attorneys. Special Bonus: This program will include one hour of ethics credit. New Jersey attorneys are advised to bring their bar number to the program. Each Bridge-the-Gap program contains updated content and will provide CLE credit to all attendees, even if they attended in the past.

Barred in New York, California and/or Pennsylvania? You too can receive credit to satisfy your CLE requirements.

**Save by registering for both days!**

**This program will not be taped. You will only have the chance to see it - live!**

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

## **NEW** Business Law for Lawyers

**Thursday, October 25, 2018 | 9:00 a.m. – 12:00 p.m.**

**NY CLE Credit:** 3.0 total (Breakdown TBD)

**Live Program & Webcast:** \$179 for Members | \$ 279 for Nonmembers

**In-House Counsel:** Free for Members | \$209 for Nonmembers

This program is designed to enhance attorneys' understanding of fundamental business, finance and accounting principles. An improved understanding of these principles should enable attorneys to advocate more effectively for their clients on both transactional matters and business litigation. Where possible, practical situations and examples will be used to convey the concepts being presented.

### **Program Chair:**

Frank Weigand | Associate General Counsel, HSBC Global Banking & Markets

### **Sponsoring Association Committee:**

In-House Counsel Committee | Daniel K. Wiig, Chair

**NEW** Transactional Lawyering: Basic Skills

**Monday, November 5, 2018 | 6:00 p.m. – 8:30 p.m.**

**NY CLE Credit:** 2.5 Skills

**Live Program & Webcast:** \$179 for Members | \$279 for Nonmembers

**In-House Counsel:** Free for Members | \$209 for Nonmembers

This program treats the skills that lawyers require to effectively engineer business transactions for their clients.

To be an effective transactional attorney requires talents that differ mightily from those required to be an effective litigator. Unlike litigation, a business deal is not -- well, at least it should not be -- a confrontational event. It is an undertaking to build an "agree"ment that benefits all parties.

Consequently, the negotiation and preparation of the contract require unique disciplines. The negotiation must be constructive, seeking to blend differences into consensus while not ignoring the advice of "The Gambler": Know when to hold 'em; know when to fold 'em; know when to walk away; and know when to run.

Similarly, writing a contract differs from other forms of writing. Its object is not to persuade or to convey information or to entertain. A contract is simply a set of instructions, a design for a business relationship or a business deal. And if that contract is not properly crafted, it will provide a playground for litigators. In fact, the job of the transactional lawyer is to place commercial litigators on the endangered species list.

This program will impart practical knowledge, skills and techniques to help the new lawyer achieve the goals mentioned above.

**Program Chair:**

Peter Siviglia | Author, Commercial Agreements - A Lawyers Guide to Drafting and Negotiating

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

## A Practical Guide to LLCs

**Friday, November 16, 2018 | 9:00 a.m. - 1:00 p.m.**

**NY CLE Credit:** 4.5 total: 2.0 Skills, 1.5 Professional Practice, 1.0 Ethics

**Live Program & Webcast:** \$299 for Members | \$399 for Nonmembers

**In-House Counsel:** Free for Members | \$299 for Nonmembers

In this seminar, an experienced panel will provide a practical introduction to LLCs. The panel will compare the LLC structure to corporations (including S corporations), partnerships and sole proprietorships, citing the advantages and disadvantages of each such structure and how such advantages and disadvantages can shape one's choice-of-entity decision. Speakers will walk through the mechanics of forming an LLC, including drafting the basic operating agreement. Working from actual operating agreements, panelists will review managerial, voting, governance and control structures (including consents and tie-breaker arrangements), typical as well as unusual capital structures (including preferred interests, profits interests and multi-class interests) and buy-outs and exit strategies (including drag-alongs and tag-alongs and buy-outs upon death). The discussion will include the use of equity-based incentive compensation arrangements in the context of an LLC and compare them to traditional corporate stock option plans. Throughout its presentation the panel will highlight tax issues and benefits that arise from the utilization of LLCs, discuss new developments in the area of LLC law and provide real-world examples of the use of LLCs in specific businesses and contexts.

### **Program Chair:**

Stella Lellos | Rivkin Radler LLP

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

# COMMUNICATION

## Fearless Public Speaking for Lawyers

**Tuesday, October 9, 2018 | 6:00 p.m. - 8:00 p.m.**

**NY CLE Credit:** 2.0 Skills

**Live Program:** \$149 for Members | \$249 for Nonmembers

**Small Law Firm:** \$79 for Members

This course will develop the skills relied upon by lawyers when engaged in public speaking situations - whether in a courtroom, conference room, or large auditorium. Attendees will learn how to prepare, practice and deliver a talk in an interesting way. Gain knowledge on how to effectively use relevant quotations and anecdotes (not jokes); make eye contact; and gesture like a pro.

Topics will include:

- Knowing your audience
- Determining the optimum time for various talks
- Preparing your talk with a good opening and good closing
- Delivery techniques
- How persuasive public speaking enables lawyers to “make a difference”

By learning and following time-honored techniques, you’ll no longer fear speaking to groups of any size and be known as “a tough act to follow.”

**Program Instructor:**

Conrad Teitell | Cummings & Lockwood LLC

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

## Efficient, Effective and Powerful Legal Writing

**Tuesday, December 4, 2018 | 6:00 p.m. - 8:00 p.m.**

**NY CLE Credit:** 2.0 Skills

**Live Program & Webcast:** \$149 for Members | \$249 for Nonmembers

**Small Law Firm:** \$79 for Members

In this hands-on workshop, you will learn strategies for writing more efficiently and effectively, including how to organize memos clearly and provide useful roadmaps. We will cover techniques for quickly eliminating common writing weaknesses, including lack of organization, weak paragraph structure and convoluted sentences.

You will learn strategies for drafting:

- Effective Introductions
- Powerful Headings
- Concise, Clear Sentences

This workshop is geared toward junior attorneys but provides a useful review for attorneys at all levels.

### **Program Instructor:**

Mary Campbell Gallagher | BarWrite® and BarWrite Press

# COMPLIANCE

## **NEW** Corporate Governance & Controls: Minimizing Risks

**Friday, October 19, 2018 | 9:00 a.m. – 1:00 p.m.**

**NY CLE Credit:** 4.5 total: 3.5 Professional Practice, 1.0 Ethics

**Live Program & Webcast:** \$239 for Members | \$339 for Nonmembers

**In-House Counsel:** Free for Members | \$269 for Nonmembers

This course will enable both in-house and outside counsel to expand their skills in and be more valuable to their clients by covering the why, what, when, where and how of corporate governance and controls and risk management. The governance and risk management environment has changed in the last few years. Structuring and enhancing the three lines of defense and other best practices will be covered. You will learn about these changes from experts in the field. Lawyers who practice for any industry and work in securities, M&A, litigation and regulatory areas need to increase their knowledge of the terminology and methodology for governance and risk management to effectively advise clients. Risk management professionals and board members will also increase their expertise.

### **Program Chair:**

Adele Hogan | Director, Forensic, Litigation and Valuation Services,  
Baker Tilly Virchow Krause, LLP

### **Sponsoring Association Committees:**

Banking Law Committee | Gregory L. Lyons, Chair

Financial Reporting Committee | Chair TBA

Mergers, Acquisitions & Corporate Control Contests Committee | Trevor Saul Norwitz,  
Chair

Securities Regulation Committee | David S. Huntington, Chair

Futures & Derivatives Regulation Committee | Gary Edward Kalbaugh, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

# CONSUMER AFFAIRS

## Hot Topics in Advertising & Marketing Law

Friday, October 12, 2018 | 9:00 a.m. - 12:00 p.m.

**NY CLE Credit:** 3.0 Professional Practice

**Live Program & Webcast:** \$199 Member | \$299 Nonmember

**In-House Counsel:** Free for Members | \$219 Nonmember

**Small Law Firm:** \$99 for Members

This annual program provides an update on the most important developments affecting advertisers over the last year. The program will cover federal, state, and local enforcement actions and enforcement priorities, major litigation and self-regulatory decisions, new legislation and regulatory guidance, as well as other recent developments. Topics to be covered include false advertising, social media marketing, intellectual property, consumer privacy, sweepstakes and promotions, and direct marketing.

### **Program Chair:**

Jeffrey Greenbaum | Frankfurt Kurnit Klein & Selz PC

### **Sponsoring Association Committee:**

Consumer Affairs Committee | Carla A. Latty, Chair

Information Technology and Cyber Law Committee | Joseph V. DeMarco & Maia T. Spilman, Co-Chairs

Trademarks & Unfair Competition | Ainslee Schreiber, Chair

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

# CORPORATE & SECURITIES

## **NEW** Data Usage Law: Monetizing Data & Privacy Issues

**Friday, September 14, 2018 | 9:00 a.m. – 1:00 p.m.**

**NY CLE Credit:** 4.5 total: 3.5 Professional Practice, 1.0 Ethics

**Live Program & Webcast:** \$239 for Members | \$339 for Nonmembers

**In-House Counsel:** Free for Members | \$269 for Nonmembers

This course will enable both in-house and outside counsel to expand their skills and be more valuable to their clients by covering the why, what, when, where and how of data usage law, including monetizing data and privacy issues. The data privacy and data usage regulatory environment has changed in the last few years, including the UK's General Data Protection Regulation (GDPR), NY State Department of Financial Services cybersecurity regulations and further changes are coming. You will learn about these changes from experts in the field. Lawyers who practice in finance, healthcare, securities, lending, M&A, litigation and regulatory areas need to increase their knowledge of this area to effectively advise clients.

This basic course will cover data privacy rules and other important data privacy and data security regulations. Using data to generate revenue while complying with regulations will be covered. There will be one ethics credit relating to compliance with data privacy and cybersecurity laws, including business interests to use data to increase revenues.

### **Program Chair:**

Adele Hogan | Director, Forensic, Litigation and Valuation Services,  
Baker Tilly Virchow Krause, LLP

### **Sponsoring Association Committees:**

Banking Law Committee | Gregory L. Lyons, Chair

Financial Reporting Committee | Chair TBA

Mergers, Acquisitions & Corporate Control Contests Committee | Trevor Saul Norwitz,  
Chair

Securities Regulation Committee | David S. Huntington, Chair

Futures & Derivatives Regulation Committee | Gary Edward Kalbaugh, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

**LIVE ONLY!** Corporate Counsel Symposium: Advising through Partnering

Friday, December 7, 2018 | 9:00 a.m. – 1:30 p.m.

*(Includes Networking Luncheon)*

**NY CLE Credit:** 3.5 Professional Practice

**Live Program:** \$299 for Members | \$399 for Nonmembers

**In-House Counsel:** \$199 for Members | \$299 for Nonmembers

The role of in-house counsel is unique in the legal profession. Unlike their counterparts in other settings, in-house counsel not only provides legal advice to their client/ employer, but also participates as a business partner in the results of the advice rendered. Effective in-house counsel creates value by imparting sound legal advice, while also weaving themselves into the fabric of the business. This symposium will focus on the dual role of in-house counsel as lawyer and businessperson, how in-house counsel can create value for themselves and their companies, and best practices for meeting these challenges.

**Program Chair:**

Shabbir Chaudhury | Corporate Counsel, MetLife

**Sponsoring Association Committee:**

In-House Counsel Committee | Daniel K. Wiig, Chair

Women in the Legal Profession Committee | Melissa Colon-Bosolet, Chair

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

# CRIMINAL LAW

## New York Criminal Law Practice 101

**Wednesday, October 17, 2018 | 6:00 p.m. - 9:00 p.m.**

**NY CLE Credit:** 3.0 total: 2.5 Professional Practice, 0.5 Ethics

**Live Program & Webcast:** \$199 for Members | \$299 for Nonmembers

**Small Law Firm:** \$119 for Members

**Not a criminal defense attorney? Come learn the basics of New York City criminal law practice**

What should you do and what questions should you ask when a client calls you about a criminal matter? How do you counsel your client? What should you be sure not to do? And when you get to court, what rights should you preserve? What ethical issues may come up, and how should you navigate them if they come up?

Learn the inner workings of a New York City criminal courtroom. Find out everything you need to do to preserve the rights of your client, whether dealing with a minor problem or a serious matter, from the first minute your telephone rings until the dust settles. This program is a must for any attorney unfamiliar with criminal law practice.

### **Program Co-Chairs:**

Jessica Peck | Assistant District Attorney, Cybercrime and Identity Theft Bureau,  
New York County District Attorney's Office

Terri Rosenblatt | Staff Attorney, DNA Unit, Legal Aid Society

### **Sponsoring Association Committee:**

Criminal Courts Committee | Kerry Ward, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

## **NEW** Retirement Planning: Preparing Your Clients (and Yourself!)

**Tuesday, October 16, 2018 | 6:00 p.m. – 9:00 p.m.**

**NY CLE Credit:** 3.0 Professional Practice

**Live Program & Webcast:** \$99 for Members | \$199 for Nonmembers

**Government/Nonprofit/Academic:** Free for Members | \$99 Nonmember

This program will offer attorneys a comprehensive overview of the legal, financial and practical considerations of retirement planning. The three-hour program will include presentations in three primary areas of concern to most retirees, i.e. healthcare costs, income and retirement benefits. The program will also help attorneys identify potential issues for New York or dual-state residents, and will include a presentation on the practical and ethical considerations of closing a law practice that will be applicable to many solo and small firm attorneys who may attend the program. The goal of the program is to educate the attendees about the various government and private benefits available to retirees and seniors, to be incorporated into any conversation about planning for retirement.

**Target Audience:** Newly admitted, intermediate and advanced attorneys from the Greater Metropolitan Area; those advising clients on elder law issues.

### **Program Co-Chairs:**

Naomi Levin | Grimaldi & Yeung LLP

Katya Sverdlov | Law Offices of Katya Sverdlov

### **Sponsoring Association Committee:**

Legal Problems of the Aging Committee | Britt Burner, Chair

## Social Media and the Practice of Law: Ethical Implications and a How-To Guide for Social Media

Thursday, September 20, 2018 | 6:00 p.m. – 9:00 p.m.

**NY CLE Credit:** 3.0 Ethics

**Live Program & Webcast:** \$199 for Members | \$299 for Nonmembers

**In-House Counsel:** Free for Members | \$219 for Nonmembers

**Small Law Firm:** \$99 for Members

In keeping with the times, lawyers are turning to social media sites to enhance their professional presence. These on-line activities have ethical implications. During this program, panelists will discuss both the “how to” and ethical implications of using social media in your legal practice.

Topics will include:

- The use of social media and the ethical implications for lawyers – including permissible tweets and posts, how posts may constitute lawyer advertising, avoiding pitfalls, i.e. the unauthorized practice of law, protecting confidential information, and law firm “ownership” of the individual attorney’s publications
- Ethics opinions, case studies and current case law
- APRL/ABA recent proposal to revise the advertising rules, on the path to simpler and uniform rules
- The latest trends in social media as they relate to practicing attorneys
- How to effectively integrate social media into your practice
- New mediums on the horizon and their potential effect on how attorneys practice and advertise

### **Program Chair:**

Rosangely Frick | Commerzbank AG

### **Sponsoring Association Committee:**

Women in the Legal Profession Committee | Melissa Colon-Bosolet, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

***NEW*** Attorney Discipline:

Reflections from the Presiding Justices, Clerks of Court, and Department Chiefs on the Critical Changes in Procedure and Recent Decisions

Thursday, September 27, 2018 | 6:00 p.m. - 8:00 p.m.

*(Reception to Follow)*

NY CLE Credit: 2.0 Ethics

Live Program & Webcast: \$99 for Members | \$199 for Nonmembers

Government Sector Attorneys: Free for Members | \$25 for Nonmembers

On October 1, 2016, the new Unified Rules for Attorney Disciplinary Matters went into effect. Join us for this rare opportunity to hear from the different players involved, from those who drafted, commented on, and signed the Rules into law, to those who are charged with implementing the Rules as they enforce the New York Rules of Professional Conduct. The panel will discuss recent cases decided under the new Rules -- the effects procedurally on investigations, timing, sanctions, and more. Hear more about the two most welcomed changes by the defense bar -- Discipline by Consent and Diversion.

**Program Chair:**

Kathy W. Parrino | First Department Attorney Grievance Committee

**Program Moderator:**

Kaylin L. Whittingham | Whittingham Law

**Sponsoring Association Committee:**

Professional Discipline Committee | Kaylin L. Whittingham, Chair

**Ethical Considerations for Corporate Investigations:  
Views from All Sides**

**Thursday, October 4, 2018 | 6:00 p.m. - 9:00 p.m.**

**NY CLE Credit: 3.0 Ethics**

**Live Program & Webcast: \$229 for Members | \$329 for Nonmembers**

**In-House Counsel: Free for Members | \$249 for Nonmembers**

This annual update program will explore current issues and recent developments relating to ethical duties and responsibilities of attorneys and other participants in corporate internal investigations involving public companies and other entities. These issues will be discussed from the point of view of counsel for the entity, investigating counsel, counsel for individual executives and government representatives. The presentation will touch on a broad array of ethical issues, devoting special attention to current developments concerning prosecution and regulatory strategies, conflicts of interest, protection and waiver of the attorney-client privilege, counseling of employee witnesses, and issues raised by global investigations, involving multinational entities.

**Program Chair:**

Frank Wohl | Lankler Siffert & Wohl LLP

**Sponsoring Association Committee:**

White Collar Crime Committee | Michael Schachter, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

**LIVE ONLY!** Current Legal Ethical Issues

with Professor Stephen Gillers

Monday, [October 15, 2018](#) | 6:00 p.m. - 8:15 p.m.

Wednesday, [December 5, 2018](#) | 6:00 p.m. - 8:15 p.m.

NY CLE Credit: 2.5 Ethics

Live Program: \$249 for Members | \$349 for Nonmembers (Per Program)

No matter your practice area or whether or not you have previously attended, you won't want to miss this program. Join us to hear this nationally renowned professor and ethicist address current issues of legal ethics. Programs typically feature distinct topics which are chosen close in time to the event to maximize topicality. The topics are geared to an audience of diverse interests. Audience questions and comments are encouraged.

*Stephen Gillers is Elihu Root Professor of Law at New York University School of Law, where he has taught since 1978 and served as Vice Dean from 1999 to 2004. He has written widely on legal ethics and has spoken at hundreds of events in the U.S. and abroad. He is the author of Regulation of Lawyers: Problems of Law and Ethics first published in 1985 and now in its 10th edition.*

*From 2000-2002, Professor Gillers was a member of the ABA's Multijurisdictional Practice Commission. In 2010-2013, he was a member of the ABA's 20/20 Commission. In 2011, he received the Michael Franck Award from the ABA's Center for Professional Responsibility. In 2015, he received the American Bar Foundation's Outstanding Scholar Award.*

*Professor Gillers' recent scholarship includes "Guns, Fruit, Drugs, and Documents: A Criminal Defense Lawyer's Responsibility for Real Evidence," 63 Stan. L. Rev. 813 (2011); "A Profession, If You Can Keep It: How Information Technology and Fading Borders Are Reshaping the Law Marketplace and What We Should Do About It," 63 Hastings L. J. 953 (2012); "How To Make Rules for Lawyers: The Professional Responsibility of the Legal Profession," 40 Pepperdine L. Rev. 365 (2013)(Symposium issue on The Lawyer of the Future); "Lowering the Bar: How Lawyer Discipline in New York Fails to Protect the Public," 17 J. Legis. & Public Policy 485 (2014); and "A Tendency to Deprave and Corrupt: The Transformation of American Obscenity Law from Hicklin to Ulysses II, 85 Wash. L. Rev. 215 (2007).*

**This program will not be taped. You will only have the chance to see it - live!**

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

**NEW Ethical Issues for In-House Counsel: Transactional Aspects**

**Thursday, November 1, 2018 | 6:00 p.m. - 8:00 p.m.**

**NY CLE Credit:** 2.0 Ethics

**Live Program & Webcast:** \$229 for Members | \$329 for Nonmembers

**In-House Counsel:** Free for Members | \$219 for Nonmembers

The panel will discuss ethical issues particularly pertinent to transactions and in-house counsel, including duties of confidentiality, truthfulness, and disclosure, drafting errors, negotiation tactics, communications with represented parties, and conflicts of interest.

**Program Co-Chairs:**

Matthew A. Schwartz | Sullivan & Cromwell LLP

Lindsay A. Weinreb | Assistant Vice President, Compliance, PJT Partners

**Sponsoring Association Committees:**

In-House Counsel Committee | Daniel K. Wiig, Chair

Professional Ethics Committee | Bruce A. Green, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

## Lights, Camera, Ethics!:

### Why Your Favorite Movie Lawyers May Need an Ethics Lawyer

**Thursday, November 15, 2018 | 6:00 p.m. - 8:10 p.m.**

**NY CLE Credit:** 2.5 Ethics

**Live Program & Webcast:** \$229 for Members | \$329 for Nonmembers

A great actress once said “Everything I learned, I learned from the movies.” Fortunately she was not a lawyer. Some of our favorite and unforgettable movie characters over the years have been lawyers. These characters have made us laugh, cry, and inspired us to do great things. But sometimes what we learn from the big screen may not fly in the real-world where the Rules of Professional Conduct govern lawyers’ conduct. Join us for a fun-filled evening where we will explore some of the ethics issues that arise in lawyer movies including the duties of candor, competence, and the unauthorized practice of law. Ethics credits and popcorn to be provided by the City Bar.

#### **Program Co-Instructors:**

Will Lopez | Foley & Lardner LLP

Tyler Maulsby | Frankfurt Kurnit Klein & Selz PC

#### **Sponsoring Association Committee:**

Professional Ethics Committee | Bruce A. Green, Chair

## The Scope of Attorney-Client Privilege

Thursday, November 29, 2018 | 6:00 p.m. - 9:00 p.m.

**NY CLE Credit:** 3.0 Ethics

**Live Program & Webcast:** \$229 for Members | \$329 for Nonmembers

**In-House Counsel:** Free for Members | \$279 for Nonmembers

This panel discussion will provide a review of attorney-client privilege. The panel, consisting of highly accomplished and experienced practitioners, will address the relevant legal standards and best practices on a wide-range of key privilege issues, including:

- The role of in-house counsel
- Internal investigations
- Disclosure to third parties (e.g., the government)
- Recent case law concerning the privilege

### **Program Chair:**

Jack Yoskowitz | Seward & Kissel LLP

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

# FAMILY LAW

## Effective Drafting of Matrimonial & Family Agreements

**Wednesday, October 10, 2018 | 6:00 p.m. - 9:00 p.m.**

**NY CLE Credit:** 3.0 Professional Practice

**Live Program & Webcast:** \$199 for Members | \$299 for Nonmembers

**Small Law Firm:** \$99 for Members

This seminar will provide the do's and don't's of drafting divorce and separation agreements, pre-nuptial and post-nuptial agreements, and parenting plan agreements. Sample agreements will also be provided in the materials. Strategies and skills will be taught for drafting specific, unambiguous financial clauses, proper procedural clauses, and clauses in the best interests of children. Special attention will be paid to clauses varying or waiving from statutory formulas for maintenance and child support, how the new tax law effects the drafting of matrimonial agreements, sunset clauses in pre-nuptial and post-nuptial agreements and parenting plan agreements for special needs children and diverse families.

**Program Chair:** Sherri Donovan | Sherri Donovan & Associates

**NEW** Whose Child Is This:

The Impact of Artificial Reproductive Technology in Matrimonial and Trust/Estate Law

**Tuesday, October 23, 2018 | 6:00 p.m. – 8:15 p.m.**

**NY CLE Credit:** 2.5 Professional Practice

**Live Program & Webcast:** \$149 for Members | \$249 for Nonmembers

**Small Law Firm:** \$79 for Members

*Description coming soon. Please visit our website at [nycbar.org](http://nycbar.org) for updated information.*

**Program Chair:**

Michael Stutman | Stutman Stutman & Lichtenstein, LLP

**Sponsoring Association Committee:**

Matrimonial Law Committee | Dylan S. Mitchell, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

## **NEW** [A Practical Introduction to Smart Contracts and their Technology](#)

Thursday, October 4, 2018 | 9:00 a.m. - 12:00 p.m.

**NY CLE Credit:** 3.0 Skills

**Live Program & Webcast:** \$179 for Members | \$279 for Nonmembers

This program will familiarize attorneys with automated "smart contracts" such as those made possible by Ethereum. The CLE will describe the potential impact of smart contract technology on assorted industries and legal specialties (securities, real estate, supply chain, etc.), familiarize the audience with issues pertaining to the drafting of smart contracts, and explore how and when smart contracts are legally enforceable and binding.

**Target Audience:** Lawyers involved with or interested in any kind of transactional law or intellectual property

### **Program Chair:**

Matthew Reisman | Arshack Hajek & Lehrman PLLC

### **Sponsoring Association Committee:**

Science and Law Committee | Aileen Nielsen, Chair

# LABOR & EMPLOYMENT

## Employee Dismissals: Avoiding the Pitfalls

Wednesday, October 24, 2018 | 6:00 p.m. - 9:00 p.m.

**NY CLE Credit:** 3.0 Professional Practice

**Live Program & Webcast:** \$199 for Members | \$299 for Nonmembers

**In House Counsel:** Free for Members | \$219 for Nonmembers

**Small Law Firm:** \$99 for Members

If you are an employment law practitioner, in-house counsel or advise employers or employees on workplace-related matters and HR professionals, you cannot afford to miss this program.

An expert panel will cover numerous legal issues and challenges that arise when an employee is to be dismissed.

Topics to be addressed include:

- Best practices for the termination process
- Tips and strategic considerations for drafting effective releases and severance agreements
- Enforcement of non-competes and other post-employment obligations
- The various causes of action terminated employees may consider or assert, with a particular emphasis on recent developments in wrongful termination law

### **Program Chair:**

Tricia B. Sherno | Debevoise & Plimpton LLP

### **Sponsoring Association Committee:**

Labor & Employment Committee | Katherine A. Greenberg, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

**NEW** Epic Supreme Court Rulings in Labor & Employment Law

**Wednesday, November 7, 2018 | 6:00 p.m. - 9:00 p.m.**

**NY CLE Credit:** 3.0 Professional Practice

**Live Program & Webcast:** \$229 for Members | \$329 for Nonmembers

This term the Supreme Court handed down rulings in the cases of *Digital Realty Trust, Inc. v. Somers*; *Janus v. AFSCME*; and *Epic Systems Corp. v Lewis*. These decisions have the potential to dramatically impact the practice of Labor and Employment Law, as we know it. The cases deal with issues ranging from the continued viability of public sector unions, the extent to which the Dodd Frank Act protects whistle blowers, and the impact of the National Labor Relations Act on class and collective action waivers. The distinguished panel will discuss the history and impact of each case holding, with an eye to forecasting their potential ramifications. This program is a must for anyone who practices labor and employment law.

**Program Chair:**

Joan C. Lenihan | Attorney at Law

**Sponsoring Association Committee:**

Labor & Employment Committee | Katherine A. Greenberg, Chair

## **FLSA Math: How to Calculate Wage-Related Damages**

**Friday, November 9, 2018 | 9:00 a.m. – 12:00 p.m.**

**NY CLE Credit:** 3.0 Professional Practice

**Live Program & Webcast:** \$229 for Members | \$329 for Nonmembers

**In-House Counsel:** Free for Members | \$249 for Nonmembers

**Small Law Firm:** \$119 for Members

This lively and challenging CLE program will provide the nuts-and-bolts necessary for attendees to understand the at times confusing formulas that apply when calculating wage-related damages under the Fair Labor Standards Act and the New York Labor Law. Join a distinguished panel of management and employee-side attorneys as they explain the myriad ways in which damages are calculated under both laws.

The panel will discuss specific and complex examples that arise in practice, such as calculating hourly, overtime, and minimum wage rates; interest under state and federal laws; liquidated damages; statutory damages under the Wage Theft Prevention Act; tip credits and tip damages; spread-of-hours pay; and non-hourly wage rates (e.g., salaried and piece-rate employees). The program will also focus on special rules for the calculation of damages in the hospitality, domestic worker, and building services industries. The panel will also address nuances between calculating damages in class actions, collective actions, and single plaintiff cases.

### **Program Chair:**

Louis Pechman | Pechman Law Group PLLC

### **Sponsoring Association Committees:**

Federal Courts Committee | Laura Grossfield Birger, Chair

Labor & Employment Law Committee | Katherine A. Greenberg, Chair

Restaurant and Hospitality Committee | David Helbraun, Chair

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

**NEW Sexual Harassment Summit:**  
**Perspectives and New Best Practices in the Wake of #MeToo**

**Friday, November 30, 2018 | 9:00 a.m. – 1:00 p.m.**

**NY CLE Credit:** 4.0 total (Breakdown TBD)

**Live Program & Webcast:** \$49 for Members | \$99 for Nonmembers

This program will address the changing legal landscape with the advent of the #MeToo movement and employer best practices for addressing sexual harassment in the workplace.

An expert panel will cover:

- The Changing Legal Landscape Related to Sexual Harassment under New York City and New York State law
- Employer Best Practices for Conducting Sexual Harassment Training in the Workplace
- Employer Best Practices for Conducting Sexual Harassment Investigations and Preparing For Possible Litigation
- Resolving Sexual Harassment Matters: Public Relations, Severance Agreements, and Special Issues

**Program Co-Chairs:**

Richard B. Friedman | Richard Friedman PLLC

Tricia Sherno | Debevoise & Plimpton LLP

**Sponsoring Association Committees:**

In-House Counsel Committee | Daniel K. Wiig, Chair

Labor & Employment Law Committee | Katherine Greenberg, Chair

Sex & Law Committee | Mirah E. Curzer & Melissa S. Lee, Co-Chairs

Please note important CLE information about this program:

- **Newly admitted New York attorneys** (attorneys admitted to the New York State Bar for two years or less) cannot earn credit for the segments of the program that provide Diversity, Inclusion and Elimination of Bias credits.
- **Experienced New York attorneys due to re-register on or after July 1, 2018** must earn one credit hour in Diversity, Inclusion and Elimination of Bias. The rest of the Diversity, Inclusion and Elimination of Bias credits for this program can be used to meet the remainder of the 24 credit hour biennial requirement (except for the Ethics & Professionalism credit requirement).

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

# LITIGATION

## Practicing in New York State Supreme Court:

### **Part One: Basic Geography, Terminology and Practice**

**Wednesday, September 26, 2018 | 6:00 p.m. - 9:00 p.m.**

### **Part Two: The Basics of Litigation in the NYS Supreme Court**

**Wednesday, October 3, 2018 | 6:00 p.m. - 9:00 p.m.**

#### **NY CLE Credit:**

6.0 Skills (Both Days)

3.0 Skills (Per Day)

#### **Live Program & Webcast:**

\$399 for Members | \$499 for Nonmembers (Both Days)

\$229 for Members | \$329 for Nonmembers (Per Day)

#### **Small Law Firm:**

\$209 for Members (Both Days)

\$119 for Members (Per Day)

In this two-part program seasoned attorneys, judges, and court staff will provide a how-to guide for practicing in New York Supreme Court.

In Part One, Basic Geography, Terminology and Practice, the panel will offer a nuts and bolts introduction to civil practice in the Supreme Court. They will identify and discuss key differences between litigation in New York state court and federal court, basic terms and key players in the state courts, the rules of practice governing Supreme Court practice, the locations of and functions of Supreme Court offices in New York City, the mechanics of how a litigation progresses in the Supreme Court, filing papers and courtroom custom and practice.

In Part Two, The Basics of Litigation in the NYS Supreme Court, the panel will provide an overview of how to litigate a civil action in the Supreme Court in New York City. They will discuss the lifecycle of common categories of Supreme Court actions, including how to initiate an action, seeking preliminary relief, discovery, motion practice, hearings and trials, judgment collection and alternative dispute resolution in the Supreme Court.

#### **Program Co-Chairs:**

John Lundin | Schlam Stone & Dolan LLP

Isaac Zaur | Clarick Gueron Reisbaum LLP

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

## CPLR Update 2018

**Thursday, November 8, 2018 | 6:00 p.m. - 9:00 p.m.**

**NY CLE Credit:** 3.0 Professional Practice

**Live Program & Webcast:** \$199 for Members | \$299 for Nonmembers

**Small Law Firm:** \$99 for Members

Join *New York State Bar Journal* “Burden of Proof” author David Paul Horowitz for his 2018 update on New York civil practice rules and decisions. Mr. Horowitz will discuss recent developments in New York civil practice, flagging problems, suggesting solutions, and focusing on best practices.

Topics will include:

- Statutes of Limitation & Jurisdiction
- Notices of Claim & Commencement
- Pleadings & Motion Practice
- Disclosure Overview
- Depositions
- Electronic Disclosure & Client Confidentiality
- Expert Witnesses
- Summary Judgment & Trial Practice

**Program Instructor:**

David Paul Horowitz | Geringer, McNamara & Horowitz, LLP

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

**NEW LIVE ONLY** **Trials of the Century – Part II**

**Thursday, December 13, 2018 | 9:00 a.m. – 4:30 p.m.**

**NY CLE Credit:** 7.0 total (Breakdown TBD)

**Live Program:** \$399 for Members | \$499 for Nonmembers

Building on the of the popular *Trials of the Century* program, Todd Winegar is back with more great trials, more actual video and transcripts – all illustrating techniques to question, cross-examine and depose witnesses – THE major part of an attorney’s practice.

- Watch entertaining top courtroom drama from the century’s most famous trials.
- Learn techniques for examining, cross-examining, deposing and interviewing witnesses in court and deposition.
- Observe world-class attorneys show you how to question a witness – and how not to.
- Learn from the century’s greatest trial attorneys and adopt their examination techniques.

Cases covered include:

- **The Triangle Shirtwaist Fire**
- ***Paula Jones v. President Clinton***
- **The Chicago Seven** - Ethics from the century’s most “wild trial”
- **Ted Bundy** - Bright law student / notorious serial killer

**This program will not be taped, you only have one chance to see it - Live!**

**Program Instructor:**

Todd S. Winegar - a dynamic, highly rated speaker, has taught CLE programs across the country. Mr. Winegar’s practice emphasizes civil trial litigation, including a Minuteman missile accident case, professional malpractice, and product liability actions. He draws examples from these experiences to present a thought-provoking yet practical seminar.

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

# NONPROFIT LAW

## Hot Topics in Not-for-Profit Law

**Monday, October 29, 2018 | 6:00 p.m. - 9:00 p.m.**

**NY CLE Credit:** 3.0 Professional Practice

**Live Program & Webcast:** \$199 for Members | \$299 for Nonmembers

**Government/Nonprofit/Academic:** Free for Members | \$149 for Nonmembers

**In-House Counsel:** Free for Members | \$219 for Nonmembers

**Small Law Firm:** \$99 for Members

There are thousands of nonprofit organizations in New York City. They include schools, hospitals, cultural institutions, social services agencies, foundations, advocacy groups, and professional associations. Providing counsel to nonprofit organizations requires knowledge and understanding of corporate and tax laws and regulatory regimes that often differ from those applicable to for-profits.

This program is designed to bring those who counsel nonprofits (whether as inside or outside counsel) and board members up to date on the latest issues facing their organizations. Our program will provide an update on the most important developments affecting non-profits over the last year. The program will cover new legislation and regulatory guidance, federal and state enforcement actions, and other recent developments.

### **Program Co-Chairs:**

Tara Herman | Associate General Counsel, Girl Scouts of the USA

Jennifer Reynoso | General Counsel, Wellspring Philanthropic Fund

### **Sponsoring Association Committee:**

Non-Profit Organizations Committee | Jennifer Reynoso, Chair

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

# REAL ESTATE

## Residential Real Estate Closings:

### What You Need to Know From Pre-Contract to Closing

**Mondays, September 24 & October 1, 2018 | 6:00 p.m. - 9:00 p.m.**

#### **NY CLE Credit:**

6.0 total: 2.5 Professional Practice, 2.5 Skills, 1.0 Ethics

#### **Live Program & Webcast:**

\$399 Member | \$499 Nonmember (Both Days)

\$229 Member | \$329 Nonmember (Per Day)

This program covers the basics of the purchase and sale of cooperatives, condominiums and houses. The panelists will review forms of ownership, pre-contract due diligence (including an overview of statutory and common law requirements, and practice tips), transfer and mortgage taxes, title insurance and lien searches. The program will also discuss the contract of sale, with special attention to the loan contingency and other most frequently negotiated contract provisions, provide an overview of basic residential loan issues, as well as general estate planning considerations, commonly encountered problems (such as combined apartments), and “how to” close a transaction. The course materials will contain the latest forms and necessary check lists. This program’s updated content will provide CLE credit to all attendees, even if they attended in the past.

#### **Program Chair:**

Mindy H. Stern | Schwartz Sladkus Reich Greenberg Atlas LLP

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

**Hot Topics Affecting Cooperatives & Condominiums:  
Cases and Marketplace Developments in the Last Six Months**

**Monday, October 22, 2018 | 6:00 p.m. - 8:00 p.m.**

**NY CLE Credit:** 2.0 Professional Practice

**Live Program & Webcast:** \$199 for Members | \$299 for Nonmembers

This twice yearly program is essential for those who practice coop and condo law and for those attorneys who sit on boards.

**Program Chair:**

Andrew P. Brucker | Montgomery McCracken Walker & Rhoads LLP

**Sponsoring Association Committee:**

Cooperative & Condominium Law Committee | Ronald J. Gold, Chair

**NEW New Age Leasing: Shared Workspaces, Foodhalls, and Pop-up Stores**

**Tuesday, November 13, 2018 | 6:00 p.m. - 8:00 p.m.**

**NY CLE Credit:** 2.0 total (Breakdown TBD)

**Live Program & Webcast:** \$199 for Members | \$299 for Nonmembers

In the current economy a real estate attorney needs to be familiar with more than the standard lease. Shared Workspaces, Foodhalls, and Pop-up Stores represent the “new age” of office and retail leasing. Whether representing a landlord or a tenant, the attorney needs a keen awareness of different issues involved in negotiating these “new age” leases. Shared workspace agreements can seem more like a hybrid of a license dealing with both real estate and technology components. Foodhall agreements have unique issues which relate to the permanency and fluidity of location as well as to the mix of all vendors. Pop-up stores can be a great way for landlords to generate rent from empty retail space and also provide retailers with a means to create a buzz and to quickly and economically try a new concept or location. This CLE panel will discuss each of these growth areas and provide guidance as to issues that distinguish it from negotiating a standard lease. The program will provide drafting and negotiating techniques from both the landlord’s and tenant’s point of view. This CLE is a **must** for anyone who practices real estate law who wants to be current with the new trends and realities of leasing.

**Program Moderator:**

Diane Schottenstein | Schottenstein Law Firm

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

## The Do's and Don't's of Zoning Lot Mergers & Development Rights Transfers in New York City

**Monday, December 3, 2018 | 6:00 p.m. - 9:00 p.m.**

**NY CLE Credit: 3.0 Skills**

**Live Program & Webcast: \$229 for Members | \$329 for Nonmembers**

In response to the recent significant upswing in development rights transactions, this program will provide an overview of current New York City law governing zoning lot mergers and the transfer of unused development rights, known as “air rights,” between contiguous and non-contiguous lots, as well as the mechanics and practical considerations involved in such matters. The program will review the relevant provisions of the NYC Zoning Resolution, explain core concepts using real life examples, explore key title issues, and go through each of the forms required for zoning lot merger transfers. In addition, the program will discuss special zoning districts with additional incentives for development rights transfers, as well as discuss the laws and procedures governing the transfer of development rights from city-owned properties to privately-owned parcels.

### **Program Co-Chairs:**

Sheila M. Pozon | Kramer Levin Naftalis & Frankel LLP

Benjamin Stark | Slater & Beckerman PC

### **Sponsoring Association Committee:**

Land Use Planning & Zoning Committee | David Mark Karnovsky, Chair

# SMALL LAW FIRM

## **NEW** Small Law Firm Practice Management Challenges & Solutions

**Friday, September 21, 2018 | 9:00 a.m. - 11:00 a.m.**

**NY CLE Credit:** 2.0 Law Practice Management

**Live Program & Webcast:** \$99 for Members | \$199 for Nonmembers

**Small Law Firm:** \$59 for Members

This program will discuss critical challenges, along with solutions, facing the small law firm practitioner in 2018. Particular attention will be paid to financial, tax, and business matters. Issues to be covered will include:

- Tax planning and challenges created by the new tax law
- Practice management concerns – billing, collecting, cash flow
- Succession planning
- IT concerns & cyber-security
- Goals and business planning

### **Program Co-Instructors:**

Scott W. Paterson, JD, LL.M. | Withum Smith + Brown

Bill Sansone, CPA | Withum Smith + Brown

### **Sponsoring Association Committee:**

Small Law Firm | Gary M. Kaufman, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

**NEW Consultants, Third Party Providers, Other Attorneys & In-House Staff and Systems: Vital Outside Relationships and Inside Muscle to Support the Small Law Firm Practitioner**

**Thursday, October 25, 2018 | 6:00 p.m. - 8:00 p.m.**

**NY CLE Credit: 2.0 Law Practice Management**

**Live Program & Webcast: \$99 for Members | \$199 for Nonmembers**

**Small Law Firm: \$59 for Members**

“Small Firm Big” - Come and hear how a small firm can operate just like a big firm with the right consultants, service providers, computer and web-based assistance, full use of the expertise of experts witnesses, joint prosecution/defense agreements and co-counsel. A panel of third-party service providers, experts and consultants will tell their best collaborative stories and show you how to maximize your results, minimize your work and streamline your cases to compete with the biggest firms out there.

**Program Chair:**

Jenice L. Malecki | Malecki Law

**Sponsoring Association Committee:**

Small Law Firm | Gary M. Kaufman, Chair

**NEW Optimizing Client Intake and the Initial Client Relationship:  
Critical Early Small Law Firm Management Issues**

**Monday, November 19, 2018 | 6:00 p.m. - 8:00 p.m.**

**NY CLE Credit:** 2.0 Law Practice Management

**Live Program & Webcast:** \$99 for Members | \$199 for Nonmembers

**Small Law Firm:** \$59 for Members

The goal of this program is to assist practitioners in managing and improving client intake. Seasoned lawyers will discuss best practices for initial client consultation; conflict check; case assessment; client fit screening, including client ability to pay fees; the engagement letter and retainer; and building the client relationship from the outset. The program will serve as a key primer for lawyers in firms of all sizes, but will be geared primarily for solo and small law firm practitioners.

**Program Chair:**

Kerry A. Brennan | Brennan Law Firm PLLC

**Sponsoring Association Committee:**

Small Law Firm | Gary M. Kaufman, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

# TAX & ACCOUNTING

## **NEW** Tax Planning under the Tax Cuts and Jobs Act of 2017

Thursday, October 18, 2018 | 6:00 p.m. – 8:30 p.m.

**NY CLE Credit:** 2.5 Professional Practice

**Live Program & Webcast:** \$179 for Members | \$279 for Nonmembers

The Tax Cuts and Jobs Act of 2017 has produced a dramatic transformation in the tax planning landscape, much of which stems from the more favorable taxation of C corporations and the new 20% deduction for qualified business income from pass-through entities. In addition, there have been dramatic changes in the international tax rules; meanwhile, state law workarounds to deduction limitations on state and local taxes (SALT) are proliferating. This program will bring you up to date on this emerging tax planning landscape in the face of the most significant tax reform legislation of the past thirty years.

### **Program Chair:**

Kevin Matz | Stroock & Stroock & Lavan LLP

### **Sponsoring Association Committees:**

Estate and Gift Taxation Committee | Evelyn Capassakis, Chair

Personal Income Taxation Committee | Jeremy Temkin, Chair

Taxation of Business Entities Committee | John P. Barrie, Chair

## How to Read and Understand a Financial Statement and Tax Return

Friday, November 2, 2018 | 9:00 a.m. - 12:00 p.m.

**NY CLE Credit:** 3.0 Skills

**Live Program & Webcast:** \$229 for Members | \$329 for Nonmembers

A greater understanding of the client's financial matters allows the attorney to better service the client and to possibly generate additional services for the client and billings for the law firm.

This program is a comprehensive seminar, designed to familiarize the attorney with the structure and contents of the client's financial statements and tax returns.

Items to be covered in this program include:

- Overview and Purposes of Financial Statements
- Types of Financial Statements
- Levels of Accountant's Report
- Contents of Financial Statements
- Overview of Tax Returns of Various Business Entities
- Common Differences Between Financial Statement and Tax Return Reporting

### **Program Co-Instructors:**

Howard H. Fine, CPA/ABV/CFF,CVA | Partner-in-Charge of the Accounting & Auditing Group, Gettry Marcus CPA, P.C.

Steven J. Eller, CPA, JD | Tax Partner, Gettry Marcus CPA, P.C.

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

# TRUSTS & ESTATES

## **NEW** **LIVE ONLY!** Hail to the Chiefs: Practical Aspects of NYS Surrogate's Court Procedure From the Chief Clerks

**Wednesday, September 12, 2018 | 5:30 pm – 8:30 pm**  
**(Includes Networking Reception)**

**NY CLE Credit:** 2.0 Professional Practice

**Live Program & Webcast:** \$149 for Members | \$249 for Nonmembers

Join us for an evening of pointers on best practices - An expert panel of Surrogate's Court Chief Clerks will discuss practical aspects of Surrogate's Court procedure, based on a set of detailed hypotheticals, including:

- Filing Requirements, Including E-Filing
- Will Review: What Do They Look For?
- Standby Guardianships
- Practical Advice for Practicing Attorneys
  - Probate Matters
  - Administrative Matters

There will also be opportunity for informal discussion with the Chief Clerks after the panel.

### **Program Co-Chairs:**

Natasha Pang-Mei Chang | Law Office of Natasha Pang-Mei Chang, LLC  
Ian W. MacLean | The MacLean Law Firm, P.C.

### **Program Moderator:**

Laura Joy Lattman | McLaughlin & Stern, LLP

### **Sponsoring Association Committee:**

Trusts, Estates & Surrogate's Court | Andrew S. Auchincloss, Chair

*This program has been generously sponsored by:*



To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

## **Estate Planning Strategies: The Top Ten List**

**Wednesday, November 14, 2018 | 6:00 p.m. - 9:00 p.m.**

**NY CLE Credit:** 3.0 Professional Practice

**Live Program & Webcast:** \$199 for Members | \$299 for Nonmembers

**Small Law Firm:** \$99 for Members

When attorneys meet with clients to discuss estate planning, there is an assortment of ideas that are considered, discussed, and presented to clients. This program covers the ten estate planning techniques that the speakers most frequently consider. The goal of the program is to discuss how each technique works, including some of the more pressing (or troublesome) technical considerations, who it works for, as well as the salient planning considerations. Some of the techniques covered include lifetime planning, GRATs, QPRTs, sales to IDITs, Family Limited Partnerships, CRUTS, CLATs, insurance trusts, and a few other common planning techniques.

### **Program Co-Chairs:**

Evelyn M. Capassakis | Principal, Personal Financial Services, PricewaterhouseCoopers  
Kevin Matz | Stroock & Stroock & Lavan LLP

### **Sponsoring Association Committee:**

Estate & Gift Taxation | Evelyn M. Capassakis, Chair

To register for this program, please visit:  
**[nycbar.org/cle](http://nycbar.org/cle)**

## Ownership of Cooperative Apartments and Condominiums by Trusts: An Overview of Popular Trusts and Obtaining Transfer Approval from Cooperative Boards

**Tuesday, November 27, 2018 | 6:00 p.m. - 8:30 p.m.**

**NY CLE Credit:** 2.5 Professional Practice

**Live Program & Webcast:** \$229 for Members | \$329 for Nonmembers

**Small Law Firm:** \$59 for Members

This course presents an overview of estate planning under the 2017 Tax Reform Act and its temporary doubling of the Federal estate, gift and generation-skipping tax exemptions. It covers the more common types of trusts and trends in transfer requests for permission to transfer apartments to such trusts, including Grantor Trusts, Qualified Personal Residence Trusts, Spousal Lifetime Access Trusts and Dynasty Trusts. It describes the tax attributes of these trusts and why some trusts are more effective, as a result of recent tax changes and the current interest rate environment. It forecasts which trusts will likely be more popular under the 2017 Tax Reform Act.

The program will discuss the role of counsel to coop boards in reviewing these requests and how practitioners can structure their trusts to increase the likelihood of approval. It will also address cooperative and condominium requirements when owning an apartment in a trust. Specifically, the speakers will discuss what documents will be reviewed, whether attorneys' opinion letters will be necessary and whether buildings require ancillary documents such as guaranty, occupancy agreement or escrow.

### **Program Co-Instructors:**

Dale J. Degenshein | Stroock & Stroock & Lavan LLP

Anita S. Rosenbloom | Stroock & Stroock & Lavan LLP

Lois Tilton | Kurzman Eisenberg Corbin & Lever, LLP

### **Sponsoring Association Committees:**

Estate & Gift Taxation | Evelyn M. Capassakis, Chair

Cooperative & Condominium Law | Ronald J. Gold, Chair

To register for this program, please visit:

**[nycbar.org/cle](http://nycbar.org/cle)**

# UPCOMING WINTER/SPRING 2019 PROGRAMS

## **Grants of the Trial Bar**

Wednesday, January 16, 2019 | 6:00 p.m. – 9:00 p.m.

*(Includes Networking Reception)*

## **Basic Mediation Training: Conflict Resolution Theory & Techniques**

Tuesday, February 26, 2019 | 9:00 a.m. – 5:00 p.m.

Wednesday, February 27, 2019 | 9:00 a.m. – 5:00 p.m.

Tuesday, March 5, 2019 | 9:00 a.m. – 5:00 p.m.

Wednesday, March 6, 2019 | 9:00 a.m. – 5:00 p.m.

## **5th Annual Employment Law Institute**

Friday, March 8, 2019 | 8:15 a.m. – 5:15 p.m.

*(Includes Networking Reception)*

## **7th Annual Securities Litigation & Enforcement Institute**

Wednesday, January 23, 2019 | 9:00 a.m. – 5:00 p.m.

*(Includes Networking Reception)*

## **7th Annual Nonprofit Law Institute**

Friday, March 29, 2019 | 9:00 a.m. – 5:00 p.m.

*(Includes Networking Reception)*

## **Current Issues in Insurance Regulation 2017**

Friday, April 12, 2019 | 9:00 a.m. – 2:00 p.m.

## **Women in White Collar Kickoff Reception**

Tuesday, May 14, 2019 | 6:30 p.m. – 8:30 p.m.

## **7th Annual White Collar Crime Institute**

Wednesday, May 15, 2019 | 9:00 a.m. – 5:00 p.m.

*(Includes Networking Reception)*

For more information on all upcoming programs, please visit our website at

[www.nycbar.org/cle](http://www.nycbar.org/cle)

# **NEW YORK CITY BAR MEMBERS: WE'VE UPGRADED YOUR MEMBERSHIP**

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- Newly admitted lawyers (admitted less than 2 years)
- In-house/corporate counsel
- Government sector, academia and non-profit lawyers
- Judges and their staff

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*All information is subject to change.*

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## **Requests for Accommodations**

If you are planning on attending a CLE program and have a hearing or vision impairment, contact the New York City Bar Association at [customerservice@nycbar.org](mailto:customerservice@nycbar.org) or 212.382.6663 and we will endeavor to accommodate you.



[www.nycbar.org/cle](http://www.nycbar.org/cle)