



Rhode Island Bar Association  
**2019 ANNUAL MEETING**

Awards Reception JUNE 13

Annual Luncheon JUNE 14

Rhode Island Convention Center, Providence

## WELCOME



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*President*



**David N. Bazar, Esq.**  
*President-Elect*



**Richard P. D'Addario, Esq.**  
*Treasurer*



**Lynda L. Laing, Esq.**  
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## 2019 ANNUAL MEETING

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## 2019 ANNUAL MEETING

Dear Colleagues,

I look forward to seeing you at the Bar Association's 2019 Annual Meeting on Thursday and Friday, June 13th and 14th at the Rhode Island Convention Center. This year's hard-working Annual Meeting Planning Committee, ably chaired by Patrick A. Guida, produced a diverse and enriching program for us. Supporting this effort, many Bar members and the Bar staff have worked with the Committee to ensure a seamless presentation of workshops and social events. As a result, our Annual Meeting provides attendees with an outstanding opportunity to learn, improve your practice, socialize with your colleagues, and fulfill your annual CLE requirements.

We have a wide range of seminars scheduled over the two days of the Annual Meeting, providing guidance in family, probate, criminal, trial and commercial law, a variety of ethics-related topics, the always popular State and Federal Court updates and more. These seminars are enhanced by the participation of many distinguished and accomplished presenters, including many of our colleagues. Please also visit our exhibitors offering a range of practice-related products and services.

This year, our Thursday morning plenary speaker is Loretta LaRoche, an international stress management expert who embraces the use of humor as a coping mechanism. She has authored eight best-selling books and has starred in seven PBS shows aired on over eighty stations nationwide. During her presentation, Ms. LaRoche will teach attendees how to let go of their pessimistic thought processes and practice optimism through the use of humor. And, our Friday Afternoon Plenary presentation by Jack Marshall, D.C. and Massachusetts lawyer, former prosecutor, and nationally recognized legal ethics expert, will explore ethical problems and dilemmas using parodies of widely-recognized hits from the 70s and 80s.

On Thursday afternoon, in the midst of a lively reception, we will honor our Annual Bar Award winners (please see page 15 for a complete listing and description of this year's awards) for outstanding achievements. During our Annual Awards Luncheon on Friday, we are honoring our colleagues for their 50 years of service in the profession, following an address by our incoming Bar Association President, David N. Bazar. Additionally, we will have the pleasure of traditional remarks by Supreme Court Chief Justice Paul A. Suttell on the State of the Rhode Island Judiciary.

The 2019 Annual Meeting Planning Committee's attention to our diverse membership's interests and needs results in an excellent program, and I urge you to take advantage of the Annual Meeting's early registration fee savings by completing and sending in your registration form before June 7th.

It has been an honor and pleasure serving you throughout the past year, and, again, I look forward to seeing you on June 13th and 14th.



Carolyn R. Barone, Esq.  
President, Rhode Island Bar Association

8:00am	<b>Registration Begins and Exhibits Open</b> – Convention Center, Ballroom Foyer, 5th Floor						
8:45 – 9:20am	<b>Welcome by Carolyn R. Barone, Esq., Bar President</b> Convention Center, Ballroom A, 5th Floor						
9:20 – 10:20am	<b>1 Plenary – Loretta LaRoche</b> 1.0 ETHICS						
10:20 – 10:45am	<b>Morning Break</b>						
10:45am – 12:00pm	<b>2</b> Meet RI's New Attorney General  1.0 CREDIT + .5 ETHICS	<b>3</b> Start-Ups 101  1.0 CREDIT + .5 ETHICS	<b>4</b> Family Law Update*  1.0 CREDIT + .5 ETHICS	<b>5</b> Environmental, Energy, & Coastal Law  1.0 CREDIT + .5 ETHICS	<b>6</b> Estates, Guardianships, & Trusts*  1.0 CREDIT + .5 ETHICS		
12:00 – 1:30pm	<b>Members Luncheon</b> – Convention Center, Rotunda, 5th floor						
12:00 – 1:30pm	<b>Rhode Island Bar Foundation Fellows Annual Meeting</b> – Convention Center, 1st floor						
1:30 – 2:45pm	<b>7</b> RI Traffic Tribunal Update  1.5 CREDITS	<b>8</b> Choice of Entity  1.0 CREDIT + .5 ETHICS	<b>9</b> Resiliency to Preserve Fitness to Practice  1.5 ETHICS	<b>10</b> Subsidized Housing  1.5 CREDITS	<b>11</b> Dos & Don'ts of Medical Depositions*  1.5 CREDITS	<b>12</b> Section 1983 Actions*  1.5 CREDITS	<b>13</b> Asset Protection Planning  1.5 CREDITS
2:45 – 3:15pm	<b>Afternoon Break</b>						
3:15 – 4:30pm	<b>14</b> Opening Statements  1.5 CREDITS	<b>15</b> Uncommon Entity Structures  1.5 CREDITS	<b>16</b> Divorce in RI Family Court at Age 50+*  1.0 CREDIT + .5 ETHICS	<b>17</b> Property Tax Appeals  1.5 CREDITS	<b>18</b> Marijuana Laws  1.5 CREDITS	<b>19</b> Virtual Law Office  1.5 CREDITS	<b>20</b> Helping Clients Talk Healthcare Wishes*  1.5 CREDITS
4:30pm	<b>Annual Awards Reception</b> – Convention Center, Rotunda, 5th floor						

8:00am	EXHIBITS OPEN	<b>Registration Begins and Exhibits Open</b> – Convention Center, Ballroom Foyer, 5th Floor						
8:45 – 9:00am		<b>President's Welcome by Carolyn R. Barone, Esq.</b> Convention Center, Ballroom A, 5th Floor						
9:00 – 10:15am		<b>21</b> Civil Case Law Update* 1.5 CREDITS	<b>22</b> U Visa Application, Requirements, & Procedure* 1.5 CREDITS	<b>23</b> Plan for Lawyer Well-Being 1.5 ETHICS	<b>24</b> Tax Cuts & JOBS Act on Low and Middle Income 1.5 CREDITS	<b>25</b> Valuations of Assets* 1.5 CREDITS	<b>26</b> Non-Profit Governance #MeToo 1.0 CREDIT + .5 ETHICS	<b>27</b> Cyber Liability Insurance and Breaches 1.0 CREDIT + .5 ETHICS
10:15 – 10:45am		<b>Morning Break</b>						
10:45am – 12:00pm		<b>28</b> Summation 1.0 CREDIT + .5 ETHICS	<b>29</b> Criminal Case Law Update* 1.5 CREDITS	<b>30</b> Ethics Technology Jungle 1.5 ETHICS	<b>31</b> <u>Janus v. AFSCME:</u> Public Labor Unions 1.5 CREDITS	<b>32</b> RI Superior Court Business Calendar 1.5 CREDITS	<b>33</b> Out-of-State Subpoenas in RI & Federal Court* 1.5 CREDITS	
12:00 – 2:00pm		<b>Annual Meeting Luncheon</b> – Convention Center, Ballroom B/C, 5th floor						
2:00 – 3:00pm		<b>34</b> State Court E-Filing Update 1.0 CREDIT	<b>35</b> Campus Sexual Misconduct* 1.0 CREDIT	<b>36</b> Golden Nuggets 1.0 ETHICS	<b>37</b> Hot Topics in Animal Law 1.0 CREDIT	<b>38</b> Usury* 1.0 CREDIT	<b>39</b> Drones in the National Airspace 1.0 CREDIT	
3:00 – 3:15pm	<b>Afternoon Break</b>							
3:15 – 4:15pm	<b>40</b> Ethics Rock Extreme! 1.0 ETHICS							

\* Please Note: Courses marked with an asterisk (\*) are approved for re-certification to court appointment panels. Courses taken for court appointment must be relevant to the panels.

**COURSEBOOK HARD COPY \$30. Go Green.** Your registration includes a complimentary copy of the course materials in PDF format. Registrants receive a link to the course materials by email prior to the program and a flash drive at registration. Registrants may also purchase a hard copy for a fee of \$30. Registrants who select the hard copy receive their course book upon arrival at the event. No hard copies are available for walk-in registration.

**PLEASE NOTE:** Courses marked with an asterisk (\*) are approved for re-certification to court appointment panels. Courses taken for court appointment must be relevant to the panels.

8:00am

**Registration Begins and Exhibits Open**

Convention Center, Ballroom Foyer, 5th Floor

8:45 – 9:20am

**Welcome** Carolyn R. Barone, Esq., *President*, Ballroom A, 5th Floor

**In Memoriam:** Lynda L. Laing, Esq., *Secretary*

**Nominating Committee Report:** Michael R. McElroy, Esq., *Chairperson*

**Treasurer’s Report:** Richard P. D’Addario, Esq., *Treasurer*

9:20 – 10:20am

**1 Thursday Plenary Session**

1.0 ETHICS

**Stress Less with Humor and Optimism**

A life that is fulfilling is predicated on discovering how to use thoughts, feelings, and behaviors to enhance our mental and physical well-being. Many of us go day to day hypnotized by internal dialogue that leads us down the path of negativity and unhappiness. It is often the result of parental and societal messages, but it can also be an inherited predisposition towards depression and/or anxiety. Optimism, which is a resiliency-based model, can be taught. It is not the fairy tale concept of simply thinking positive thoughts, but rather an explanatory style. When we add the ingredient of humor, our ability to handle life’s inevitable ups and downs becomes more accessible. Ms. LaRoche will explore how to shift from pessimistic thoughts that create feelings of failure and rejection to those that are more optimistic, how purpose and passion help to enhance meaning in one’s life, and how fun can be the antidote to stress.



Loretta LaRoche

Loretta LaRoche is an international stress management expert who embraces the use of humor as a coping mechanism. She has authored eight best-selling books and has starred in seven PBS shows aired in over eighty stations nationwide. She was an adjunct faculty member at the Mind/Body Medical Institute an affiliate of Harvard Medical School for fifteen years. She has shared the stage with former President Bill Clinton, Tony Robbins, Dr. Phil, Suze Orman, Arianna Huffington, Quincy Jones, Ellen DeGeneres and a host of other dignitaries and celebrities. Her signature humor is her ability to observe the absurdities that are so much a part of the human condition and culture which often lead to stress.

**MEETING EXHIBITORS** offer a wide range of helpful, practice-related products and services including appraisal services, website development, retirement plans, record management, law practice software, computer support, court reporting, mediation services, title services, and more. Learn about the latest products and services, investigate resources, build relationships and learn about developments in the profession.

10:20 – 10:45am

**Morning Break**

Enjoy a range of refreshments and conversation, while connecting with our exhibitors who are offering valuable law practice and business management services.

10:45am – 12:00pm

**Concurrent Workshops** (choose one from #2-6)

**Please Note:** Courses marked with an asterisk (\*) are approved for re-certification to court appointment panels. Courses taken for court appointment must be relevant to the panels.

10:45am – 12:00pm

2

**Meet Rhode Island's New Attorney General**

1.0 CREDIT + .5 ETHICS

LEVEL – ALL

**Moderator:** Victoria M. Almeida, Esq., *Adler Pollock & Sheehan P.C.*

**Speakers:** David D. Curtin, Esq., *RI Disciplinary Counsel*

Peter F. Neronha, Esq., *RI Attorney General*

John A. Tarantino, Esq., *Adler Pollock & Sheehan P.C.*

Join in a conversation with Rhode Island's new Attorney General at this exciting seminar. The presenters look at the historical role of the office and his vision for the ever-changing and expanding role of the Attorney General to address the contemporary and sometimes conflicting needs of society.

10:45am – 12:00pm

3

**Start-Ups 101: Legal Strategies and Experiences from Israel, the Startup Nation**

1.0 CREDIT + .5 ETHICS

LEVEL – BEGINNER,  
INTERMEDIATE

**Moderator:** Miriam A. Ross, Esq., *Law Offices of Miriam A. Ross, Esq.*

**Speakers:** Oded Kadosh, Esq., *Pearl Cohen Zedek Latzer Baratz*

Avi Nevel, *Rhode Island-Israel Collaborative (RIIC)*

This workshop provides an overview of what attorneys need to know when advising their clients on their start-up businesses including structuring the business venture, preventing and mitigating conflict between founders, management of relationships with investors and employees, and protecting critical assets (including IP).

10:45am – 12:00pm

4

**Family Law Update\***

1.0 CREDIT + .5 ETHICS

LEVEL – ALL

**Moderator:** Stephen M. Prignano, Esq., *McIntyre Tate LLP*

**Speakers:** Jane F. Howlett, Esq., *Attorney at Law*

Vincent A. DiMonte, Esq., *Attorney at Law*

This program presents new Rhode Island Supreme Court cases in family law, as well as addresses unique approaches to certain family court issues, and important legislative changes to family law cases and in administrative orders.

10:45am – 12:00pm

5

**Update on Environmental, Energy & Coastal Law**

1.0 CREDIT + .5 ETHICS

LEVEL – INTERMEDIATE

**Moderator:** Marisa A. Desautel, Esq., *Desautel Law***Speakers:** Karen A. Benson, Esq., *Law Office of Alan A. Amaral*Michael J. Daly, Esq., *Pierce Atwood LLP*Christopher A. D'Ovidio, Esq., *D'Ovidio Law*Gregory S. Schultz, Esq., *RI Department of Attorney General*

This workshop provides an update on recent developments in environmental, energy, and land use law. The presenters review recent legislation and case law, an overview on solar project development, an update on litigation from the state's Attorney General's office, a discussion of maritime and coastal issues, and potential conflicts of interest considerations.

10:45am – 12:00pm

6

**Current Developments in Estates, Guardianships & Trusts\***

1.0 CREDIT + .5 ETHICS

LEVEL – INTERMEDIATE

**Moderator:** Hon. Cristine L. McBurney, *Pawtucket Probate Court***Speakers:** Hon. Paula M. Cuculo, *North Providence Probate Court*Hon. Christine J. Engustian, *Richmond Probate Court*

Join the presenters as they review 2018-2019 Superior and Supreme Court decisions, legislation, and current developments in the areas of decedents' estates, guardianships, trusts, and probate court practice.



12:00 – 1:30pm

### Rhode Island Bar Association Members' Luncheon

Convention Center, Rotunda, 5th floor **THIS IS A TICKETED EVENT**

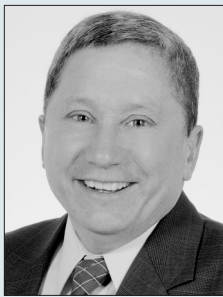
Enjoy a relaxed lunch with your colleagues, then take a leisurely stroll through the exhibits and recharge your batteries. Remember, our Awards Reception immediately follows the last seminar at 4:30 p.m.

12:00 – 1:30pm

### Rhode Island Bar Foundation Fellows Annual Meeting

Convention Center, 1st Floor

*Fellows and invited guests receive a separate invitation for this luncheon.*



**Michael A. St. Pierre, Esq.**  
**President**

The Rhode Island Bar Foundation Fellows Annual Meeting is held in conjunction with the Rhode Island Bar Association Annual Meeting. President Michael A. St. Pierre and the Board of Directors are pleased to welcome and thank the Foundation Fellows who, through their professional, public and private careers, have demonstrated outstanding dedication to the welfare of the community and to the objectives of the Foundation. During the luncheon we recognize the recipient organizations of Interest on Lawyers Trust Account (IOLTA) grants. \$393,109 was granted this calendar year for the provision of legal services and the administration of justice in Rhode Island.

Recipients of the Thomas F. Black, Jr., Memorial Law School Scholarship are introduced. Again this year, with the continued generosity of The Horace A. Kimball and S. Ella Kimball Foundation and The Champlin Foundation, we were able to grant two \$20,000 Thomas F. Black, Jr. Memorial Scholarships to two promising first-year law students from Rhode Island who have demonstrated financial need, superior academic performance, community and public service, and demonstrated contacts with and commitment to the State of Rhode Island. Since 1989, this fund has awarded 64 scholarships, totaling many thousands of dollars to promising law students from Rhode Island.

The recipients of the Honorable Thomas J. Caldarone, Jr. Fellowship Award are also introduced. Law students are selected for this award based on their outstanding record and interest in pursuing a career in public service. Caldarone Fellows receive valuable experience in assisting with providing crucial legal services to the public and persons of limited means in the State of Rhode Island.

1:30 – 2:45pm

**Concurrent Workshops** (choose one from #7-13)

**Please Note:** Courses marked with an asterisk (\*) are approved for re-certification to court appointment panels. Courses taken for court appointment must be relevant to the panels.

1:30 – 2:45pm

7

**Rhode Island Traffic Tribunal Update**

1.5 CREDITS

LEVEL – BEGINNER,  
INTERMEDIATE

**Presenter:** Hon. Domenic A. DiSandro III, *Chief Magistrate of the RI Traffic Tribunal*

This program provides a review of recent case law updates, trends on appeal and changes under the new Chief Magistrate of the Rhode Island Traffic Tribunal.

1:30 – 2:45pm

8

**Choice of Entity**

1.0 CREDIT + .5 ETHICS

LEVEL – ALL

**Presenter:** Jean A. Harrington, Esq., *Duffy & Sweeney, Ltd.*

This session provides attendees with guidelines on how to advise your client about which type of business organization best fits their situation and purposes (i.e. S corporation, LLC, LLP). The session also includes a discussion on client intake and ethical considerations on who you represent – the owner or the company.

1:30 – 2:45pm

9

**Getting Your Bounce Back: Using Resiliency to Preserve Your Fitness to Practice**

1.5 ETHICS

LEVEL – ALL

**Moderator:** Nicholas Trott Long, Esq., *Lawyers Helping Lawyers Committee*

**Speaker:** Bree Buchanan, JD, *National Task Force on Lawyer Well-Being, ABA Commission on Lawyers Assistance Program, Texas Lawyers Assistance Program (ret.)*

One of the nation's foremost leaders of the lawyer well-being movement outlines the ways law firms and individual lawyers can address the unique difficulties facing our profession and the ethical requirements for doing so.

1:30 – 2:45pm

10

**Navigating the Waters of Subsidized Housing**

1.5 CREDITS

LEVEL – INTERMEDIATE

**Moderator:** Michael D. Crane, Esq., *The Law Offices of Michael D. Crane, L.L.C.*

**Speakers:** Hon. Mary E. McCaffrey, *RI District Court*

Murray Gereboff, Esq., *Gereboff & Gelade*

Steven S. Flores, Esq., *Housing Law Center, RI Legal Services, Inc.*

The panel addresses the conflicts arising between state and federal statutes and regulations governing section 8, project-based section 8, and public housing when landlords file actions for possession in state court. The panel also covers common procedural and ethical issues arising in that context.

1:30 – 2:45pm

1.5 CREDITS

LEVEL – ALL

11

**The Dos and Don'ts of Medical Depositions\*****Moderators:** Hon. Keith A. Cardoza, Jr., *RI Workers' Compensation Court*Hon. Susan Pepin Fay, *RI Workers' Compensation Court***Speakers:** Christopher Chihlas, M.D.John F. Cascione, Esq., *Coia & Lepore*Jeffrey M. Liptrot, Esq., *Lewis Brisbois Bisgaard & Smith LLP*

The workshop reviews the ins and outs of depositions of medical experts, specifically cross-examination and direct examination. The presentation includes a mock deposition of Dr. Christopher Chihlas by two experienced practitioners.

1:30 – 2:45pm

1.5 CREDITS

LEVEL – ALL

12

**Section 1983 Actions – Principles of Law and Litigation\*****Presenter:** John “Jack” Ryan, Esq., *Attorney at Law*

The workshop provides the framework of a civil rights action brought under Section 1983. Principles of summary judgment and qualified immunity, as well as use of experts, are presented.

1:30 – 2:45pm

1.5 CREDITS

LEVEL – INTERMEDIATE

13

**Asset Protection Planning****Presenters:** David J. Correia, Esq., LL.M., *Correia & Correia LLP*Eric D. Correia, Esq., LL.M., *Correia & Correia LLP*

Recent increases to both the federal and Rhode Island estate tax exemption have further shifted the primary concern of many estate planning clients away from tax planning, and toward asset protection planning. This workshop provides an overview of the planning issues and techniques available to (1) avoid the Rhode Island elective share, (2) protect assets in the context of divorce, (3) protect assets from creditors, and (4) protect assets in order to become eligible for government benefits, including Medicaid. The workshop includes hypothetical planning scenarios, relevant case law, and sample trust provisions.

2:45 – 3:15pm

**Afternoon Break**

Please stop by and learn how our exhibitors' unique products and services may help you in your practice or at home. Find out how you can stay ahead of the curve with some of the latest in legal software and technology.

3:15 – 4:30pm

**Concurrent Workshops** (choose one from #14-20)

**Please Note:** Courses marked with an asterisk (\*) are approved for re-certification to court appointment panels. Courses taken for court appointment must be relevant to the panels.

3:15 – 4:30pm

14

**Opening Statements: Win Before You Start**

1.5 CREDITS

**Presenter:** Michael J. Colucci, Esq., *Olenn & Penza, LLP, Verdict Shaper, LLC*

LEVEL – ALL

Jurors do not sit “neutral and detached” but instead choose sides early. As such, the opening statement provides the greatest opportunity to influence the outcome of your case. This program’s unique and highly effective methods are designed to help you “win” your case after the opening statement.

3:15 – 4:30pm

15

**What the Heck Is a Cooperative?  
An Exploration of Uncommon Entity Structures in RI**

1.5 CREDITS

**Presenters:** Marcus Howell, Esq., *McLaughlinQuinn, LLC*

LEVEL – BEGINNER

Amy T. M. Oakley, Esq., *Partridge Snow & Hahn LLP*Theodore B. Howell, Esq., *Howell Legal, Inc.*Maureen Ewing, *RI Secretary of State*

This workshop offers an analysis of lesser-adopted entity types in Rhode Island, such as low-profit limited liability companies and benefit corporations and cooperatives, with a focus on selection, formation, taxation, reporting and governance issues. Special guest Maureen Ewing, Director of Business Services of the Rhode Island Secretary of State, offers suggestions on ways to avoid common lawyer filing errors.

3:15 – 4:30pm

16

**Obstacles and Options in Divorce in Rhode Island Family Court  
at Age 50 and Beyond\***

1.0 CREDIT + .5 ETHICS

**Moderator:** Vincent A. DiMonte, Esq., *Attorney at Law*

LEVEL – BEGINNER,

INTERMEDIATE

**Speakers:** Jane E. McAuliffe, CDFA, *Collaborative Divorce Strategies*Beverlee Fairbanks, CDLP, *The Washington Trust Company*

This program reviews how to make a case for spousal support for your client, including Social Security claiming strategies, the impact of the new tax law changes, equity buyout guidelines, income vs. qualified income borrowing purposes, reverse mortgage strategies, and the importance of financial planning as clients approach retirement. This program also reviews the ethics of knowing prior to negotiation what your client’s options are and what your client qualifies to be able to do, as well as the ethics of being aware of experts who can assist you and your client prior to negotiation.

3:15 – 4:30pm

1.5 CREDITS

LEVEL – INTERMEDIATE,  
ADVANCED**17 Property Tax Appeals in Rhode Island****Moderator:** Peter F. Skwirz, Esq., *Ursillo, Teitz & Ritch, Ltd.***Speakers:** Michael A. Ursillo, Esq., *Ursillo, Teitz & Ritch, Ltd.*Elizabeth McDonough Noonan, Esq., *Adler, Pollock & Sheehan, P.C.*Michael R. Minardi, *Town of Barrington Tax Assessor's Office*

This workshop provides an overview of the process by which property owners in Rhode Island can appeal their assessment of real property taxes. Presenters will cover appeals to the tax assessor, Assessment Board of Review, and Superior Court. Key statutes and recent case law will be reviewed.

3:15 – 4:30pm

1.5 CREDITS

LEVEL – ALL

**18 Marijuana Law Update****Presenter:** Preston Halperin, Esq., *Shechtman Halperin Savage, LLP*

This program discusses the current state of marijuana law, both federally and in Rhode Island. The presenter provides an overview of the trend toward legalizing medical and recreational marijuana, with a focus on judicial decisions in the areas of employment, zoning, and criminal law.

3:15 – 4:30pm

1.5 CREDITS

LEVEL – BEGINNER

**19 Surprise! You're Already Running a Virtual Law Firm, So You Might as Well Make the Most of it****Presenter:** Jared D. Correia, Esq., *Red Cave Law Firm Consulting*

You're already managing a virtual law firm. Now, whether that's good news or bad news depends upon your view of virtualization. If you take a dim view of virtual legal services, you're going to hate that, but if you attend this presentation, you'll learn why and how virtual services can help any law firm. The presenter discusses the ways in which you're already a virtual law firm, getting the hardware and software you need to take the next step, creating a paperless workflow, managing a distributed workforce, and data security systems for a virtual law firm environment.

3:15 – 4:30pm

1.5 CREDITS

LEVEL – INTERMEDIATE,  
ADVANCED**20 Are You Up to Date with Helping Clients Talk About Healthcare Wishes?\*****Presenters:** Maureen G. Glynn, Esq., *Law Offices of Maureen G. Glynn*Harriet Warshaw, *Institute for Healthcare Improvement's  
The Conversation Project, Cambridge, MA*

Attendees learn to incorporate the recently issued American Bar Association's Guidelines for Advance Care Planning into their practices. These guidelines can assist lawyers to create advance healthcare directive documents that are meaningful and can be honored. The speakers review techniques to encourage clients to discuss healthcare wishes with loved ones, healthcare providers, and lawyers using IHI's *The Conversation Project* approach.

It's been a busy first day of our Meeting – let's finish it right! Head straight to the Rotunda, immediately adjacent to the exhibitor and snack stations, after the last Thursday session and join us for complimentary refreshments as we recognize our annual awards recipients.

Prior to the presentation of awards, we will enjoy libations and heavy hors d'oeuvres. Relax and catch up with your colleagues as we honor our exceptional award winners!

Our Thursday evening awards include the Rhode Island Bar Journal Lauren E. Jones Writing Award, the 2019 Pro Bono Awards, the Dorothy Lohmann Community Service Award, and the Joseph T. Houlihan Lifetime Mentor Award.

This event is open and FREE to ALL Bar members – don't miss out!

4:30pm

**Annual Awards Reception** (Sponsored by Our Exhibitors)Convention Center, Rotunda, 5th floor **OPEN AND FREE TO ALL BAR MEMBERS**

*All Annual Meeting attendees are welcome to join us for our festive Annual Awards Reception, an opportunity to recognize and honor outstanding work of members of the legal community who have demonstrated an extraordinary commitment to the profession, while enjoying complimentary libations and hors d'oeuvres.*

**Recognition of Officers****Rhode Island Bar Journal Lauren E. Jones, Esq. Writing Award**

The Rhode Island Bar Journal Lauren E. Jones, Esq. Writing Award recognizes authors of published Rhode Island Bar Journal articles on the basis of effectiveness of presentation, legal significance, and accuracy and depth of research and information provided.

**2019 Pro Bono Awards**

Since 1987, Pro Bono Awards have recognized the outstanding efforts of those who provide equal access to justice to the poor through a Rhode Island Bar Association pro bono program. Recipients demonstrate dedication to the administration of justice, professionalism, compassion and commitment to public service.

**VOLUNTEER LAWYER PROGRAM****Stephen G. Linder, Esq.****ELDERLY PRO BONO PROGRAM****Joanne C. D'Ambra, Esq.****Dorothy Lohmann Community Service Award**

The Dorothy Lohmann Community Service Award recognizes members for their volunteer work benefiting non-profit organizations. The award is named in memory of Rhode Island attorney Dorothy Lohmann who devoted her entire professional life to helping the poor.

**Nicholas Trott Long, Esq.****Joseph T. Houlihan Lifetime Mentor Award**

Named in honor of the late Joseph T. Houlihan, this award recognizes individuals who consistently demonstrate an extraordinary commitment to serve as role models to other lawyers; have significantly contributed to the profession and/or the community; with their excellent counsel have excelled as mentors and contributed to the ideals of ethics, civility, professionalism and legal skills.

**Janet Gilligan, Esq.**

## SCHEDULE

FRIDAY JUNE 14, 2019

8:00am

### Registration Begins and Exhibits Open

Convention Center, Ballroom Foyer, 5th Floor

8:45 – 9:00am

**President's Welcome** – Carolyn R. Barone, Esq. – Ballroom A, 5th Floor

9:00 – 10:15am

### Concurrent Workshops (choose one from #21-27)

**Please Note:** Courses marked with an asterisk (\*) are approved for re-certification to court appointment panels. Courses taken for court appointment must be relevant to the panels.

9:00 – 10:15am

21

### Civil Case Law Update\*

1.5 CREDITS

LEVEL – ALL

**Moderator:** Hon. Francis X. Flaherty, *Supreme Court of RI*

**Speakers:** Hon. Francis J. Darigan, Jr., *RI Superior Court (ret.)*

Hon. Sarah Taft-Carter, *RI Superior Court*

Hon. Sandra A. Lanni, *RI Family Court*

Lauren E. Jones, Esq., *Jones Associates*

Thomas M. Dickinson, Esq., *Law Offices of Thomas Dickinson*

Professor Jared Goldstein, *Roger Williams University School of Law*

Lara E. Montecalvo, Esq., *RI Office of the Public Defender*

The distinguished panelists provide an informative and insightful overview of recent noteworthy civil case-related decisions issued by the United States Supreme Court and the Rhode Island Supreme Court.

9:00 – 10:15am

22

### U What? U Visa Application, Basic Requirements and Procedure\*

1.5 CREDITS

LEVEL – BEGINNER,  
INTERMEDIATE

**Moderator:** Deborah S. Gonzalez, Esq., *Roger Williams University School of Law*

**Speakers:** Cecily Kerr Ziegler, Esq., *Dorcas International Institute of RI*

Joseph Molina Flynn, Esq., *Molina Flynn Law Office*

Melanie Shapiro, Esq., *Law Office of Melanie Shapiro*

The session will review U visa applications for immigrant victims of crimes, including the vulnerability of the population and basic requirements such as qualifying crimes, law enforcement certification, and substantial physical and/or mental harm. There is also a discussion on the intersection of U visas with removal proceedings.



9:00 – 10:15am

**23 Developing a Plan for Lawyer Well-Being**

1.5 ETHICS

LEVEL – ALL

**Moderator:** Nicholas Trott Long, Esq., *Lawyers Helping Lawyers Committee***Speakers:** Stacie Collier, Esq., *Nixon Peabody*Cassandra L. Feeney, Esq., *Adler, Cohen, Harvey, Wakeman,  
& Guekguezian, LLP*Charlene Elva Pratt, Esq., *RI Public Defender's Office*

Following the publication of the National Task Force Report on Lawyer Wellbeing, Ms. Collier's firm was one of the first to take up the challenge to develop a meaningful program for lawyer well-being. She explains why her firm decided to take action, what problems they've experienced, and what successes they've achieved. Ms. Feeney and Ms. Pratt will discuss how lawyer well-being programs can work in small firms and government offices.

9:00 – 10:15am

**24 The Impact of the Tax Cuts and JOBS Act of 2018 on Low and Middle-Income Taxpayers**

1.5 CREDITS

LEVEL – ALL

**Presenters:** Peri Ann Aptaker, Esq., CPA, *Kahn, Litwin, Renza & Co., Ltd.*T. Keith Fogg, Esq., *Harvard University School of Law Tax Clinic*Gregory Porcaro, CPA, *Porcaro & Associates*Elizabeth Segovis, Esq., MST, *RI Legal Services (ret.)*

The workshop features a discussion of the changes to the taxation of individuals caused by the new tax act, how they appear to have played out during the 2018 tax season, and the impact on low and middle income taxpayers.

9:00 – 10:15am

**25 Issues and Discussions on Valuations of Assets\***

1.5 CREDITS

LEVEL – BEGINNER,  
INTERMEDIATE**Moderator:** William J. Delaney, Esq., *The Delaney Law Firm, LLC***Speakers:** Fred Resnick, *Max Pollack & Co. Auctioneers, Ltd.*Sal Corio, *SJ Corio & Co.*Peter Scotti, *Scotti & Associates*Thomas Sweeney, *Sweeney Real Estate & Appraisal*Hon. John E. McCann III, *RI Family Court*

The business world is replete with issues concerning asset valuation. To guide one to identify, engage and select one in the valuation field is no small task. This seminar presents experts in the field of valuation of assets to 'walk you through' the role of appraisers in advancing and defending valuation issues.

9:00 – 10:15am

26

**Best Practices for Board Governance: Cautionary Tales for Nonprofits**

1.0 CREDIT + .5 ETHICS

LEVEL – INTERMEDIATE

**Presenters:** Elizabeth Manchester, Esq., *Partridge, Snow & Hahn*  
 Katherine Kishfy, Esq., *Hinckley Allen*  
 Rebecca E. Dupras, Esq., *Orson & Brusini, Ltd.*

There have been several national stories that have resulted in formerly highly respected nonprofits being accused of abuse in the wake of the #MeToo movement and other misconduct, causing executives to leave organizations and funders to think twice about supporting these organizations. Whether you are serving on a board, advising clients who are board members or funders or represent charities, it is critical to understand the basics of board governance to protect yourself and your clients from legal and reputational risks. The panelists cover some of these cautionary tales and provide insight into minimizing risk.

9:00 – 10:15am

27

**The Latest on Cyber Threats & Cyber Liability Insurance: How You Can Protect Your Law Firm and Your Clients**

1.0 CREDIT + .5 ETHICS

LEVEL – ALL

**Moderator:** Linn F. Freedman, Esq., CIPP/US, *Robinson + Cole, LLP*

**Speakers:** Deborah A. George, Esq., *Robinson + Cole, LLP*  
 Cindy Lepore, CLCS, CGS, *Marsh & McLennan Agency LLC*  
 Eric M. Shore, *Secure Future Tech Solutions*

The workshop is presented in three sections; first, a brief description of recent cyberattacks and general overview of data privacy and cybersecurity hot topics; second, an introduction to cyber liability insurance and the types of coverages provided; and, third, a discussion of the legal issues surrounding coverage issues, recent cases and litigation, and tips for lawyers to protect data in their firm.

10:15 – 10:45am

**Morning Break**

Check your email, network with your fellow Bar members, or browse the large selection of practice-related informational books at our CLE table!

10:45am – 12:00pm

**Concurrent Workshops** (choose one from #28-33)

**Please Note:** Courses marked with an asterisk (\*) are approved for re-certification to court appointment panels. Courses taken for court appointment must be relevant to the panels.

10:45am – 12:00pm

28

**Summation**

1.0 CREDIT + .5 ETHICS

LEVEL – ALL

**Presenter:** David Morowitz, Esq., *Law Office of David Morowitz, LTD*

Whether at the motion calendar, bench trial, jury trial, or in the Supreme Court, a final argument must be concise, pointed, easy to follow, credibly supported by the law and evidence, and persuasive. The discussion encompasses methods for bringing this all together, along with tips for effective preparation and presentation.

10:45am – 12:00pm

29

**Criminal Case Law Update\***

1.5 CREDITS

LEVEL – ALL

**Moderator:** Hon. Francis X. Flaherty, *Supreme Court of RI***Speakers:** Hon. Francis J. Darigan, Jr., *RI Superior Court (ret.)*Hon. Sarah Taft-Carter, *RI Superior Court*Hon. Sandra A. Lanni, *RI Family Court*Lauren E. Jones, Esq., *Jones Associates*Thomas M. Dickinson, Esq., *Law Offices of Thomas Dickinson*Professor Jared Goldstein, *Roger Williams University School of Law*Lara E. Montecalvo, Esq., *RI Office of the Public Defender*

The distinguished panelists provide an informative and insightful overview of recent noteworthy criminal case-related decisions issued by the United States Supreme Court and the Rhode Island Supreme Court.

10:45am – 12:00pm

30

**The Legal Technology Jungle: Surviving the Law's Newest and Greatest Ethics Challenge**

1.5 ETHICS

LEVEL – ALL

**Presenter:** Jack Marshall, Esq., *ProEthics, Ltd.*

This break-out session explores the rapidly proliferating ethical challenges of practicing law with and around technology, while recommending steps even the most tech-addled lawyers can and should take to protect clients and themselves. Using hypothetical-based problems and an interactive, entertaining format, the seminar covers a wide range of areas in a stimulating and engaging, if occasionally terrifying, manner, including the duty to protect clients from themselves, confidentiality threats, keeping current on technology, how the Rules of Professional Conduct apply to uses of technology, and where the rules provide insufficient guidance or are behind the curve. The presenter includes examples related to social media, email, text messaging, personal devices, the cloud, e-discovery, big data ethics, new technologies, and more.

10:45am – 12:00pm

31

**Janus v. AFSCME: Death Knell for Public Labor Unions or Fake News?**

1.5 CREDITS

LEVEL – ALL

**Moderator:** Vincent F. Ragosta, Jr., Esq., *Law Offices of Vincent F. Ragosta, Jr.***Speakers:** Timothy M. Bliss, Esq., *Timothy M. Bliss, Attorney at Law*Elizabeth A. Wiens, Esq., *GurskylWiens, Attorneys at Law, Ltd.*

The panel discusses the US Supreme Court's decision in the Janus case last year and the impact it has had in the decisions of lower courts, at the bargaining table and in the day-to-day operations of public employers and the labor organizations that represent them.

10:45am – 12:00pm

32

**Superior Court Business Calendar – Basics & Beyond**

1.5 CREDITS

LEVEL – BEGINNER

**Moderator:** Richard J. Land, Esq., *Chace Ruttenberg & Freedman, LLP***Speakers:** Andre S. Digou, Esq., *Chace, Ruttenberg & Freedman, LLP*  
Harmony Conti Bodurtha, Esq., *Orson & Brusini, Ltd.*Hon. Brian P. Stern, *RI Superior Court*

The program focuses on practicing before the Superior Court Business Calendar, including what cases are eligible, getting a case assigned, pleading form and filing, and court appearances. Additionally, the program reviews the newly entered administrative order and comments from the Justice regarding form, preferences, and practice tips.

10:45am – 12:00pm

33

**Beyond Our Borders: Service of Out-of-State Subpoenas and Depositions in RI State and Federal Court\***

1.5 CREDITS

LEVEL – BEGINNER

**Moderator:** Matthew DiMario, Esq., *Sulloway & Hollis, P.L.L.C.***Speakers:** Rebecca F. Briggs, Esq., *Hinckley Allen*Dana M. Horton, Esq., *Robinson + Cole, LLP*Alexander L. Friedman, Esq., *Bottaro Law Firm*

This workshop provides a practical guide to the current procedures for service of out-of-state subpoenas and deposition notices in RI state courts and federal court practice, and discusses the proposed changes to that procedure under pending legislation to adopt § 9-18.1-1, the Uniform Interstate Depositions and Discovery Act.

12:00 – 2:00pm

**Annual Meeting Luncheon** – Convention Center, Ballroom B/C, 5th floor

THIS IS A TICKETED EVENT

**Honorary Members**

Honoring our colleagues in grateful recognition of 50 years of outstanding service to the legal profession and the Rhode Island Bar Association.

**C. Russell Bengtson, Esq.****Stephen E. Cicilline, Esq.****Hon. Albert R. Ciullo****Cary J. Coen, Esq.****Hon. George N. DiMuro****Joseph F. Dugan, Esq.****Dana H. Gaebe, Esq.****Hon. Bennett R. Gallo****Vincent M. Garvey, Esq.****Pasco Gasbarro, Jr., Esq.****Hon. Henry Gemma, Jr.****Charles A. Hambly, Jr., Esq.****Raymond C. Holland, Jr., Esq.****Harry J. Hoopis, Esq.****Aram P. Jarret, Jr., Esq.****Edward G. Lawson, Esq.****John T. Madden, Esq.****Terrance S. Martiesian, Esq.****John E. Martinelli, Esq.****J. Peter McGuirl, Esq.****William T. Murphy, Esq.****Robert R. Nocera, Esq.****Hon. John J. O'Brien, Jr.****John J. Paterra II, Esq.****George T. Patton, Esq.****William J. Riccitelli, Esq.****Mitchell S. Riffkin, Esq.****Laurent L. Rousseau, Esq.****Steven S. Saber, Esq.****William G. Savastano, Esq.****Hon. Edward P. Sowa, Jr.****Max H. Wistow, Esq.****Mario J. Zangari, Esq.**

### Chief Justice Joseph R. Weisberger Judicial Excellence Award

Named in honor of its first recipient, the late Chief Justice Joseph R. Weisberger, this award is presented to a judge of the Rhode Island state courts or Federal District Court bench for exemplifying and encouraging the highest level of competence, integrity, judicial temperament, ethical conduct, and professionalism.



The Honorable William E. Smith  
Chief Judge of the United States District Court  
for the District of Rhode Island

### Address by Chief Justice Paul A. Suttell

*Supreme Court of Rhode Island*



Rhode Island Supreme  
Court Chief Justice  
Paul A. Suttell

### David N. Bazar, Esq. Accepts the President's Gavel

Join us as we highlight some of the year's accomplishments of outgoing President Carolyn R. Barone, followed by the passing of the President's Gavel to David N. Bazar, Esq. Sworn in by Chief Justice Paul A. Suttell, Mr. Bazar's one-year term officially begins on July 1, 2019.



David N. Bazar, Esq.

2:00 – 3:00pm

**Concurrent Workshops** (choose one from #34-39)

**Please Note:** Courses marked with an asterisk (\*) are approved for re-certification to court appointment panels. Courses taken for court appointment must be relevant to the panels.

2:00 – 3:00pm

34

**Rhode Island State Court E-Filing Current Developments and Future Plans**

1.0 CREDIT

**Moderator:** Michael M. Goldberg, Esq., *M. Goldberg Law LLC*

LEVEL – ALL

**Speakers:** Rhiannon S. Huffman, Esq., *Strauss, Factor, Laing & Lyons*

Gail M. Valuk, Esq., *Supreme Court of RI*

Peter Panciocco, *Supreme Court of RI*

Representatives from the Rhode Island state courts and attorneys discuss the current status of the electronic filing system and future developments.

2:00 – 3:00pm

35

**Campus Sexual Misconduct Proceedings: The Litigation and Regulatory Playing Field\***

1.0 CREDIT

**Presenters:** Steven M. Richard, Esq., *Nixon Peabody, LLP*

Jonathan Cook, Esq., *Sayer Regan & Thayer, LLP*

Janet Elie Faulkner, Esq., *Faulkner Legal*

LEVEL – INTERMEDIATE

Title IX and student misconduct cases have proliferated in our courts through lawsuits brought by complainants and respondents. The Department of Education proposed new Title IX regulations, which have generated substantial commentary and will impact the university disciplinary process in a significant manner. There has been a proliferation of Title IX cases in courts nationally, including our federal district court, which have resulted in decisions of precedential impact.

2:00 – 3:00pm

36

**Golden Nuggets**

1.0 ETHICS

**Moderator:** David D. Curtin, Esq., *RI Office of Disciplinary Counsel*

**Speakers:** Harry J. Hoopis, Esq., *Hoopis & Hoopis*

Hon. John E. Martinelli, *City of Providence Probate Court, Law Office of John E. Martinelli*

John J. Paterra II, Esq., *Attorney at Law*

LEVEL – ALL

A panel of this year's honorees for achievement of 50 years of Rhode Island law practice share their experiences, challenges, and war stories, as well as a perspective of the changes they have seen in professionalism, collegiality and technology. Discussion focuses on the Rules of Professional Conduct, which did not formally exist when these attorneys passed the bar.

2:00 – 3:00pm

1.0 CREDIT

LEVEL – BEGINNER

**37 Hot Topics in Animal Law****Moderator:** Lenore Montanaro, Esq., *Animal Law Committee***Speakers:** John Dineen, Esq., *Attorney at Law*Lauren Motola-Davis, Esq., *Lewis Brisbois Bisgaard & Smith, LLP*Keith G. Langer, Esq., *Attorney at Law*

Animal law is an emerging practice area affecting people and animals in Rhode Island and beyond. “Paws” with us to learn about a few of the hottest animal law-related topics, such as housing issues, animal accommodations, and dangerous dog hearings.

2:00 – 3:00pm

1.0 CREDIT

LEVEL – INTERMEDIATE

**38 Usury in Rhode Island: Commercial and Consumer Issues\*****Moderator:** Richard J. Land, Esq., *Chace Ruttenger & Freedman, LLP***Speakers:** Patricia Antonelli, Esq., *Patricia Antonelli Law*Gardner H. (Chip) Palmer, Jr., Esq., *DiOrio Law Office*

This session includes a review of Rhode Island statutory and case law on civil and criminal usury interest rates and a review of defenses and exemptions to usury provisions in both commercial and consumer loans. Presenters discuss case law on usury savings clauses and how the Rhode Island usury statute interacts with the exportation of interest rates for consumer credit and credit cards.

2:00 – 3:00pm

1.0 CREDIT

LEVEL – BEGINNER,  
INTERMEDIATE**39 Drones in the National Airspace: Where We Are and Where We Are Heading, An Overview of FAA Regulations and Legal Hurdles****Presenter:** Kathryn M. Rattigan, Esq., *Robinson + Cole, LLP*

Drones are becoming increasingly important for businesses of all types and sizes, and while many drone applications already exist, many more will certainly arise as drone technology continues to evolve and advance. In this seminar, we discuss how drones can collect valuable data and increase productivity, safety and efficiency across all industries. We also discuss the Federal Aviation Administration’s Part 107 regulations, waivers, the FAA “DroneZone” and the FAA’s LAANC portal, enforcement at both the state and federal level, voluntary best privacy and cybersecurity practices, and how our clients can comply with these regulations and practices when their drones hit the sky.

3:00 – 3:15pm

**Afternoon Break**

Put your networking skills to work! Chat with your colleagues as you enjoy a range of delicious refreshments.

## FRIDAY PLENARY SESSION

3:15 – 4:15pm

40

**Ethics Rock Extreme!**

1.0 ETHICS



Mike Messer

Using parodies of widely-recognized hits from the 70s and 80s, *Ethics Rock Extreme!* explores current ethical problems and dilemmas in an entertaining manner. Supported by the strains of rock classics by Freddie Mercury, Don Henley, Sting, Gerry Rafferty, Paul Simon, Bob Dylan, Billy Joel, Harry Chapin, and the ever-classic Lennon/McCartney, Ethics Rock Extreme! tackles ethics issues such as:

- Firm hand-offs from transactional to litigation
- How to be ethical when a partner has screwed up
- When impairment becomes a firm ethics matter
- Why it's harder to be ethical now
- Non-verbal lies from witnesses and clients on the stand
- The public records exception, and opposing former clients
- Up to the minute technological competence and confidentiality traps
- The limits of advocacy
- Conduct “prejudicial to the administration of justice”...or not
- Internal investigations of a corporate client, and many more.

There is no faster paced, more up-to-date, memorable and challenging way for an attorney to fulfill the legal ethics requirement. The songs will be expertly arranged and performed by New York musician, actor, and rock singer Mike Messer. Messer is a singer and actor who has been performing nationally and internationally for 18 years.



Jack Marshall, Esq.

Jack Marshall, who founded and has served as president and CEO of ProEthics, Ltd. for 22 years, has created more than 240 interactive ethics programs for bar associations, law firms, Fortune 500 companies, local and national government agencies, trade associations, and non-profit organizations. He also has worked to develop rules of professional responsibility for attorneys in emerging African democracies through the International Bar Association, and for the judiciary of the post-Soviet Republic of Mongolia, through USAID.

A member of the Massachusetts and District of Columbia Bar Associations, Marshall has served as adjunct professor of legal ethics at the American University School of Law in Washington, D.C. A graduate of Harvard College, where he specialized in American government and leadership, and Georgetown University Law Center, he prac-

ticed criminal law in Massachusetts and organization law in the District of Columbia, and led non-profit organizations devoted to education, public policy research, and health. Marshall's articles and commentary on topics ranging from leadership to ethics to popular culture have appeared in numerous regional and national periodicals, and his ethics analysis has been featured on a wide variety of talk shows, from the Montel Williams Show to Neil Cavuto's "News Hour" to PBS's "Religion and Ethics Weekly" to National Public Radio's "Tell Me More." In 2014 he was also named to the "Top 100 Thought Leaders in Trustworthy Business" (trustacrossamerica.com). Marshall is also an award-winning stage director, and for 20 years served as the artistic director for The American Century Theater, a professional non-profit theater company dedicated to producing classic American plays. He lives in Alexandria, Virginia with his wife and business partner, Grace Marshall, their son Grant, and their Jack Russell Terrier, Rugby. Like many who are interested in the nature of good, evil, justice, and chaos, Marshall is a lifetime fan of the Boston Red Sox.



## FEATURED PRODUCT AND SERVICE PROVIDERS

The Rhode Island Bar Association appreciates the support and patronage of the following featured product and service providers, and encourages attendees to stop by their exhibit spaces to learn more.

### **ABA Retirement Funds Program**

401(k) & other retirement funds  
abaretirement.com

### **Cartridge World**

Local copy, print, fax and scan experts  
cartridgeworldri.com

### **Casemaker**

RI Bar Association member benefit –  
online legal research tools  
casemakerlegal.com

### **CATIC**

Offers title insurance and title services  
catic.com

### **The Center for Mediation & Collaboration RI**

Mediation services and training  
cmcri.org

### **Collaborative Divorce Strategies**

Divorce financial planning, financial  
mediation, trial consulting & post-  
divorce investment management  
& planning  
collaborativedivorcestategies.com

### **CollegeBound Saver**

The state of RI 529 plan; a savings  
& investment vehicle for higher  
education costs  
ri529savings.com

### **CourtCall**

Remote appearance program for  
lawyers to make routine appearances  
from convenient locations at no cost  
to the court  
courtcall.com

### **Delta Dental of Rhode Island**

Dental benefits  
deltadentalri.com

### **DigiStream Investigations**

Full service surveillance company that  
specializes in social media & geosocial  
investigations  
digistream.com

### **Fidelity National Title Group**

The nation's largest group of title com-  
panies and title insurance underwriters  
nationalagency.fnf.com/ri

### **Prime Medical Legal Consultants**

Affordable medical consultants includ-  
ing interpretation of reports and  
assessments of future costs  
pmlcs.com

### **RI Association for Justice**

Association for trial lawyers  
rijustice.org

### **RI Judiciary – E-Filing Updates**

Updates on attorney portal access  
and electronic filing procedures  
courts.ri.gov

### **RI Lawyers Weekly**

News and marketing services for  
Rhode Island lawyers and law firms  
rilawyersweekly.com

### **RI Legal Services, Inc.**

Pro Bono Legal Services  
rils.org

### **Robson Forensic**

Specialist firm providing scientific  
investigations, reports, and testimony  
to resolve litigation & insurance claims  
robsonforensic.com

### **Roger Williams University School of Law**

Table to greet alumni and interact with  
employers  
law.rwu.edu

### **Secure Future Tech Solutions**

Network security and cyber security  
solutions for law firms  
securefuturetech.com

### **Shade Tree Meteorology, LLC**

Meteorological reconstruction of past  
weather events, easy-to-understand  
reports, expert testimony  
shadetreemeteorology.com

### **SJ Corio Company**

Auction & appraisal services  
sjcorio.com

### **Smart Start**

Leading provider of ignition interlocks  
for DUI offenders and portable alcohol  
monitoring devices  
smartstartinc.com

### **Tab3 Software**

Provides billing, accounting, and  
practice management software to law  
firms  
turbolaw.com

### **Thomson Reuters**

Integrated information solutions; law  
practice & firm management software  
and services  
legalsolutions.thomsonreuters.com

### **USI Insurance Services LLC**

Assists RI Bar members to obtain  
healthcare benefits for themselves  
and their employees  
usi.com

### **Washington Trust**

Personal/business banking & wealth  
management  
washtrust.com

### **Webster Bank**

Personal business banking, lending  
& investment services  
websterbank.com

## INFORMATION AND FEES

### General Information

**The Annual Meeting registration deadline is Friday, June 7th.** If you have not registered by June 7th, you must go to the walk-in registration desk. **WALK-INS WILL NOT BE ON THE REGISTRATION LIST.** Early registration is strongly encouraged. We cannot guarantee seats, meals, or conference materials to anyone registering after the deadline.

**PAYMENT METHOD** You may use cash, check, VISA, MasterCard, American Express, or Discover. Faxed registrations are accepted when paying with a credit card. The fax number is 401-421-2703. We cannot accept telephone registrations, bill you, nor issue invoices. Your cancelled check or charge receipt will serve as confirmation of your registration. **NOTE: Registrations cannot be processed without payment.**

#### **COURSEBOOK HARD COPY \$30**

**Go green. Your registration includes a complimentary copy of the course materials in a PDF format. Registrants receive a link to the course materials by email prior to the program and a flash drive at registration. Registrants may also purchase a hard copy for \$30. Registrants selecting the hard copy receive their course book upon arrival at the event. No hard copies are available for walk-in registration. THE DEADLINE TO ORDER YOUR HARD COPY COURSEBOOK IS JUNE 1, 2019.**

**CHECK-IN** Upon arrival, registrants are required to check-in at the Bar Association desk on the 5th floor pre-function area of the Convention Center. The desk opens at 8:00 a.m. each day. Two-day registrants need only check-in on Thursday. To avoid standing in long lines, we suggest you arrive early.

**CANCELLATION POLICY** Refunds, less a \$20 processing fee, are given to registrants who cancel by 12:00 noon, June 7th. There are no refunds for those who do not attend or cancel their registration after June 7th. However, a substitute, who would have paid the same tuition rate, may attend for someone unable to do so.

**SPECIAL ACCOMMODATION** Please indicate on the registration form if you require any special accommodations, or contact the CLE office directly at 401-421-5740.

### Registration Fees

**CLE SESSIONS** The daily registration fee includes admission to all CLE sessions, conference materials, continental breakfast, and coffee breaks. Registration is available for a full day only. Tickets are not available for individual seminars. The one-day fee is **\$265** (\$225 for members admitted after 2014 and Associate Members). The two-day rate is **\$365** (\$310 for lawyers admitted after 2014 and Associate Members.) If you would like both the USB and the printed materials, please add \$30 to your registration fee. \$25 will be added to the registration fee after June 7th.

**Don't register at the door!  
Save \$25 by registering before June 7th.**

**MEALS** Tickets for the Thursday Luncheon and Friday Annual Meeting Luncheon are available at a cost of \$30 each. Please order ahead. Meal tickets may not be available at the door. The Thursday Annual Awards Reception, including hors d'oeuvres, is offered to attendees and guests at no charge.

**MCLE** Annual Meeting seminars are approved for CLE credit as noted. Seminars marked with an asterisk (\*) are approved for re-certification to court appointment panels. (Courses taken for credit for specific panels must be relevant to the panel.)

**PARKING** Parking is available, for a fee, in the Convention Center garages. The entrances are on West Exchange Street. Parking is not included in the registration fee.

**TO REGISTER** Mail Registrations along with payments to **Rhode Island Bar Association, 41 Sharpe Drive, Cranston, RI 02920.** Copies of checks will not be accepted. Please do not staple checks to registration forms.

*By registering for the Rhode Island Bar Association Annual Meeting, all attendees, instructors and exhibitors acknowledge they may be photographed during the meeting. They agree that such photographs are the sole property of the Rhode Island Bar Association, and they consent to the Bar Association's unrestricted use of their name, portrait, photograph and other likeness in any and all commercial, promotional and advertising material without any monetary compensation.*

# Rhode Island Bar Association – 2019 Annual Meeting Registration

Your registration is not processed until you mail or fax this form, **with payment**, to the Rhode Island Bar Association.

**Complete one, typed or legibly printed, form for each registrant and return no later than June 7, 2019. DO NOT staple checks to form.**

No telephone registrations are accepted. **Online registration is not available for this event.** However, a fillable PDF is available for your convenience at [riabar.com](http://riabar.com). Download, fill in, print out, sign, mail or fax with payment – easy.

Name \_\_\_\_\_  
(last) (first) (MI)

Bar ID# \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_

e-mail \_\_\_\_\_  
(required)

Registration for Members	Thurs. Only	Fri. Only	Both Days
<b>Early Bird</b> – on or before June 7, 2019	<input type="checkbox"/> \$265	<input type="checkbox"/> \$265	<input type="checkbox"/> \$365
after June 7, 2019 (\$25 surcharge)	<input type="checkbox"/> \$290	<input type="checkbox"/> \$290	<input type="checkbox"/> \$390

Members admitted after 1/1/14 and Associate Members	Thurs. Only	Fri. Only	Both Days
<b>Early Bird</b> – on or before June 7, 2019	<input type="checkbox"/> \$225	<input type="checkbox"/> \$225	<input type="checkbox"/> \$310
after June 7, 2019 (\$25 surcharge)	<input type="checkbox"/> \$250	<input type="checkbox"/> \$250	<input type="checkbox"/> \$335

**Lunch** Join us for Thursday Lunch, Friday Annual Meeting Lunch, or Both (for all registrants)  \$30  \$30  \$60 \$ \_\_\_\_\_

**Annual Awards Reception – FREE** and open to all  
 RSVPs not necessary but encouraged  Free \$ **Free**

**PLEASE NOTE:** All seminar materials are on a USB flash-drive. The cost for this is included in your registration. While printed seminar materials are available, there is an added charge of \$30.

**PLEASE NOTE: Printed materials are only available if ordered BEFORE June 1, 2019.**  \$30 \$ \_\_\_\_\_

**Payment must accompany registration** Total Enclosed \$ \_\_\_\_\_

**Return form by June 7, 2019. Registrations cannot be processed without payment.**

Choose one:  Enclosed is my check payable to the Rhode Island Bar Association

Card # \_\_\_\_\_ Exp. date \_\_\_\_\_

Security code (card cannot be processed without code): \_\_\_\_\_

Signature \_\_\_\_\_

Please ensure your signature does not obscure your card # and/or Exp. Date.

FOR OFFICE USE		
Check No. _____	Amount \$ _____	Date received _____

## Thursday, June 13, 2019

- 9:20 – 10:20 am**
- 1 Plenary Address 1.0 ethics
- 10:45 am – 12:00 pm** *Check one seminar only for this time slot*
- 2 Meet RI's New Attorney General 1.0 credit + .5 ethics
  - 3 Start-Ups 101 1.0 credit + .5 ethics
  - 4 Family Law Update\* 1.0 credit + .5 ethics
  - 5 Environmental, Energy, & Coastal Law 1.0 credit + .5 ethics
  - 6 Estates, Guardianships, & Trusts\* 1.0 credit + .5 ethics
- 1:30 – 2:45 pm** *Check one seminar only for this time slot*
- 7 RI Traffic Tribunal Update 1.5 credits
  - 8 Choice of Entity 1.0 credit + .5 ethics
  - 9 Resiliency to Preserve Fitness to Practice 1.5 ethics
  - 10 Subsidized Housing 1.5 credits
  - 11 Dos & Don'ts of Medical Depositions\* 1.5 credits
  - 12 Section 1983 Actions\* 1.5 credits
  - 13 Asset Protection Planning 1.5 credits
- 3:15 – 4:30 pm** *Check one seminar only for this time slot*
- 14 Opening Statements 1.5 credits
  - 15 Uncommon Entity Structures 1.5 credits
  - 16 Divorce in RI Family Court at Age 50+\* 1.0 credit + .5 ethics
  - 17 Property Tax Appeals 1.5 credits
  - 18 Marijuana Laws 1.5 credits
  - 19 Virtual Law Office 1.5 credits
  - 20 Helping Clients Talk Healthcare Wishes\* 1.5 credits

## Friday, June 14, 2019

- 9:00 – 10:15 am** *Check one seminar only for this time slot*
- 21 Civil Case Law Update\* 1.5 credits
  - 22 U Visa Application, Requirements, & Procedure\* 1.5 credits
  - 23 Plan for Lawyer Well-Being 1.5 ethics
  - 24 Tax Cuts & JOBS Act on Low and Middle Income 1.5 credits
  - 25 Valuations of Assets\* 1.5 credits
  - 26 Non-Profit Governance #MeToo 1.0 credit + .5 ethics
  - 27 Cyber Liability Insurance and Breaches 1.0 credit + .5 ethics
- 10:45 am – 12:00 pm** *Check one seminar only for this time slot*
- 28 Summation 1.0 credit + .5 ethics
  - 29 Criminal Case Law Update\* 1.5 credits
  - 30 Ethics Technology Jungle 1.5 ethics
  - 31 *Janus v. AFSCME*: Public Labor Unions 1.5 credits
  - 32 RI Superior Court Business Calendar 1.5 credits
  - 33 Out-of-State Subpoenas in RI & Federal Court\* 1.5 credits
- 2:00 – 3:00 pm** *Check one seminar only for this time slot*
- 34 State Court E-Filing Update 1.0 credit
  - 35 Campus Sexual Misconduct\* 1.0 credit
  - 36 Golden Nuggets 1.0 ethics
  - 37 Hot Topics in Animal Law 1.0 credit
  - 38 Usury\* 1.0 credit
  - 39 Drones in the National Airspace 1.0 credit
- 3:15 – 4:15 pm**
- 40 Ethics Rock Extreme! 1.0 ethics

\* **Please Note:** Courses marked with an asterisk (\*) are approved for re-certification to court appointment panels. Courses taken for court appointment should be relevant to panels.

**Please return completed form with full payment by mail or fax, no later than June 7th.**  
**Rhode Island Bar Association, 41 Sharpe Drive, Cranston, RI 02920 Fax: 401-421-2703**

Rhode Island  
Bar Association  
41 Sharpe Drive  
Cranston, RI 02920

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## 2019 ANNUAL MEETING SCHEDULE AND REGISTRATION