
Keep raising the bar.

A N N U A L R E P O R T 2 0 1 0 – 2 0 1 1

Our mission: Excellence in the practice of law.

Massachusetts Continuing Legal Education (MCLE) aims to keep raising the caliber of lawyers' professional and ethical service to their clients and communities by providing comprehensive and highly practical continuing legal education of the highest quality to the broadest possible audience.



Massachusetts Continuing Legal Education

ABOUT MCLE

Massachusetts Continuing Legal Education, Inc. has been the Massachusetts' legal community's premier provider of hands-on programs and practical reference materials for over 50 years. Originally begun as a committee of the Massachusetts Bar Association, MCLE was incorporated in 1969 as a joint venture of the MBA and the Boston Bar Association. In 1976, we merged with the New England Law Institute, bringing to our operation a history of CLE dating from 1953.

MCLE is a nonprofit, self-supporting educational institution. We depend solely

on membership dues, program registration fees, sales of our publications and online products, and charitable contributions to finance our instructional activities and sustain growth and innovation in our programs, publications, and services.

As the leading provider of CLE in Massachusetts, we offer over 300 programs per year in a variety of in-person or online formats and publish nearly 150 practice manuals covering all areas of the law. Our programs and books have received national recognition for their practical content and use of innovative and cutting-edge technology.

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Unless otherwise indicated, information in this report was compiled for the period between September 1, 2010 and August 31, 2011. MCLE staff has made every effort to be accurate; we apologize for any oversights or other errors we may have made in assembling and presenting this material. Please let us know if you come across any error or omission so that we can correct our records.

From our Board President

I am pleased to report that despite a third straight year of challenging economic times, MCLE remains fiscally sound and continues to expand and improve the high quality legal education programs and materials that New England lawyers have come to depend on. In addition to increasing its online presence regionally and nationally, in 2011 MCLE experienced its second best financial performance in the last seven years. Many thanks to MCLE's wonderful staff, nearly 2,300 talented volunteers, 9,000 individual and firm sponsor members, and over 11,000 loyal customers who make us the premier provider of CLE in Massachusetts. This year's financial success, in large part, is also attributable to constant, strategic program and book planning to take advantage of new developments in the law; efficient leveraging of technology to market and deliver our programs and services in a cost-effective way in and beyond Massachusetts; and continued tight management of expenses.

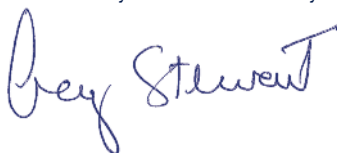
During the past year, MCLE made significant progress towards realizing the goals of its long range plan. One notable highlight has been the continuing expansion of our geographical and electronic footprint, which has helped position us as a regional CLE provider of instructive print and electronic resources for practicing lawyers throughout New England. With the assistance of expert practitioners in the other New England states, MCLE has now published 14 books under its MCLE | New England® imprint. As a result, we are nearing the completion of core collections of practice handbooks in Rhode Island and New Hampshire and are currently expanding into Connecticut and Maine.

Technology is rapidly changing the way MCLE does business. To adapt to changing lawyer preferences and respond to evolving business trends, MCLE continues to leverage technology and collaborate with national CLE providers to make more and more MCLE programs and books available online. We have increased the number of programs we webcast to regional and national audiences so that webcast registrations now account for almost half of all program registrations, have made program materials accessible to all registrants online before and after a program, and have converted our entire book collection to eBook formats to enhance their convenience and portability. The coming year will see a further expansion of MCLE's online presence with the introduction of practice-area-specific web

portals that will transform our website into a practical training resource and research gateway for Massachusetts lawyers.

Our efforts and hard work are not going unnoticed by our peers in the international community of CLE providers. In August, at its 47th Annual Meeting, the Association for Continuing Legal Education presented MCLE with two outstanding achievement awards; for our publication of *A Practical Guide to Discovery and Depositions in Rhode Island* and for the development of our eBook collection. These represent MCLE's 34th and 35th "ACLEA's Best" awards since their inception in 1992. We are honored to be recognized annually by our peers as a leader in continuing legal education. Many thanks to the staff at MCLE and to all of our volunteers for continuing to make MCLE one of the "Best."

Finally, as a result of the continuing generosity of our many donors, MCLE's scholarship endowment made considerable strides. More than 250 new gifts and pledges, totaling over \$350,000, were received during the past year. By year-end, cumulative giving levels exceeded \$2.3 million, bringing the organization within striking distance of our \$2.5 million goal so that we can prepare for the next phase of the campaign – specifically a fund to train even more pro bono lawyers to represent the poor. MCLE is honored to be recognized within the legal community as a donor-worthy organization.



Craig E. Stewart, Esq.
President, MCLE Board of Trustees



Presenting programs, publishing 2010–2011 year in review

Continued growth in online programming

During the past year, 21,734 registrants attended more than 290 MCLE programs, in a variety of in-person and online formats, either live or on-demand. Consistent with MCLE's comprehensive coverage and efforts to reach practitioners from all corners of the state—and beyond—these programs covered every practice area at every level and were presented live more than 690 times in Boston, around the Commonwealth, and via webcasts.

Nevertheless, economic challenges continue to impact MCLE as they have Massachusetts and its legal community. Although total registrations are up 18% from last year, in-person registrations (totaling 10,723) are down another 4% from the previous year. Suppressed in-person registrations impacted most programs and continue to be most acutely felt in seminars developed for new lawyers who have been practicing for five or fewer years. This can be attributed to the marketplace's slow absorption of newly admitted lawyers and the bar's financial belt-tightening.

MCLE's ability to leverage technology has helped to offset the drop in live, in-person program registrations. MCLE continued to offer cutting-edge, timely CLE on new developments in the law by responding with "fast track" programs that are conceived, scheduled and marketed at an accelerated pace, and delivered when practitioners need guidance most. During 2011, MCLE's fast-track programs on the new homestead legislation, *Ibanez's* impact on foreclosures, developments in immigration enforcement at the worksite, and valuation issues post *Adams* were among its most successful programs of the year.

One area of continued steady growth has been in the online delivery of continuing legal education, reflecting a distinct technological shift in how lawyers consume their CLE. In 2008, the first full year MCLE began webcasting its programs, webcast registrations totaled 2,800 customers, representing 16% of total program registrations for that year. Since then, MCLE has increased the number of programs it broadcasts, and in 2011,

webcasts—either independently or through our collaboration with our national partner WestLegaledcenter—accounted for nearly 10,000 customers, or over 45% of our total registrations. In addition to partially offsetting our lower in-person registrations, success in our online programming has helped broaden MCLE's appeal to local, regional and national audiences, showcase the unsurpassed expertise of our volunteers to regional and nationwide audiences, and spur efforts to do more online to accommodate varied and changing lawyer preferences.

Responding to emerging trends

The surge in webcast registrations for our programs, coupled with the dramatic growth of eBook usage in the commercial markets, suggested a need to respond to emerging trends in the publishing industry. As a result, in March, MCLE unveiled its entire collection of publications—over 150 titles—as eBooks, readable on most e-readers, including the Kindle®, iPad®, Nook®, computers and smartphones. Sales of more than 150 eBooks in the first six months indicate early receptivity to this new service. eBooks mark yet another expansion of MCLE's electronic footprint, joining MCLE's OnlineLibrary™, webcasts, and mp3 audio recordings. With programs available in person or online and reference materials accessible in print or electronically, MCLE remains committed to adapting to the changing times by providing highly practical education in a variety of formats to satisfy evolving lawyer preferences and needs.

Advancing the Court's message

One of MCLE's organizational strengths is our close relationship with the state and federal courts as they administer justice in the Commonwealth. This year was no different than past years, during which we collaborated with the courts on a number of training and educational initiatives.

Last year, nearly 150 judges from various state and federal trial and appellate courts throughout New England provided practical insight into law practice and policy by serving on MCLE program faculties and as contributors to our books.

In addition, throughout the year, MCLE has been privileged to assist the Probate and Family Court in educating both court staff and the bar on two ongoing initiatives. This was the third year in which MCLE partnered with the Court to offer programs throughout the state on the implementation of the new Massachusetts Uniform Probate Code, one of the most significant pieces of legislation in the past 25 years, which goes into effect on March 31, 2012. In addition to training thousands of lawyers



Nearly 11,000 customers attended MCLE programs in person during the past year, while an additional 11,000 opted for online or audio programs.

ng books, fostering excellence



about the new legislation, MCLE assisted the Court in the training of its staff by preparing and distributing educational materials to all court personnel. We also continued to work closely with the Court in implementing the new continuing education requirements for guardians ad litem in Categories E (Evaluators) and F (Investigators) fee-generating appointments. And, with the recent passage of the new alimony reform law, we are now working with the Court to create programs to train the bar in this newest major legal development.



Moreover, MCLE is honored to work with United States District Court Judge Douglas Woodlock on the publication of a federal district court series of judicial histories that, taken together, will chronicle the substantial contributions of the U.S. District Court of Massachusetts and its distinguished members and collectively become an oral history of the Court. The first book in the series, *Benchmarks XXIV: The Life and Legacy of Joseph L. Tauro, 24th United States District Court Judge for the District of Massachusetts*, was published in October 2011. The second book currently under development in the series will feature the life and work of Judge Rya Zobel. We look

forward to our continued collaboration on this impressive collection and making each installment widely available to the broader community.

Training those who advocate for the poor

During these difficult economic times, the demand for legal, social and health services for the poor remains high. Yet, while called upon to do more, providers of these services have seen their budgets cut, staffs reduced, and funds for training eliminated. Understanding the vital role these advocates serve, in 2011 MCLE reaffirmed its commitment to training legal services lawyers, pro bono practitioners, and other professionals who serve the poor. In addition to working with the Massachusetts Law Reform Institute (MLRI) for the fourth consecutive year to offer and subsidize public benefits trainings for lawyers and non-lawyer advocates, MCLE continued to award scholarships to our programs at steadily increasingly high rates.

In partnership with 35 organizations around the state that provide legal services to the poor or assign pro bono cases, MCLE awarded 1,177 scholarships to its programs throughout the year to help train their staff attorneys or recruit, train and retain private practitioners to

accept pro bono cases. These scholarships free up those organizations' limited resources for direct client services. As a result of an additional 393 need-based scholarships awarded to other deserving private and public-sector lawyers, MCLE's scholarship program funded over 14% of total in-person registrations.

Given the current fiscal crisis and the drastic cuts in legal services budgets, there has been an increasing demand for qualified, well-trained private lawyers to accept pro bono cases. To respond to this urgent need, MCLE is working with a committee of past board presidents and current trustees to embark on the second phase of the scholarship campaign, *the Pro Bono Scholarship Fund*, to raise an additional \$2.5 million to train 1,000 more pro bono lawyers each year to represent the poor. Focused exclusively on the training of more pro bono lawyers, this new initiative is intended to bridge the gap between the number of scholarships available to pro bono attorneys and the increasing demand for practical training.

Thinking about the future

In an ongoing effort to adapt to changing and varied lawyer preferences and position ourselves for the future, MCLE is transforming its website into a gateway for research and a powerful training resource for Massachusetts lawyers. As of September 1, 2011, all MCLE programs are supported by online program materials so that registrants, regardless if coming in person or participating by webcast, can sign onto a dedicated program page to view and download the program materials in advance of and up to 90 days after a program.

Moreover, MCLE is developing practice-area portals that will make everything MCLE has accessible online, in their entirety or by their component parts (e.g., individual lectures from programs, chapters from books). In addition to identifying all resources MCLE has in a particular practice area, these portals will include (1) comprehensive new lawyer professional development plans linked to suggested lectures, programs, chapters, books, and forms; (2) trial skills training modules that feature practical demonstrations from experienced faculty, as well as judicial and expert commentary; (3) discussion forums to raise questions or chat about timely practice topics; and (4) links to selected non-MCLE resources available for free online for further research on a particular subject. Although each piece will be available for purchase separately, access to MCLE's entire online database of programs, books, forms and trial demonstrations also will be available through an annual OnlinePlus™ Pass subscription so that all resources are just a click away.



Operations income	\$4,614,259 . . .	Surplus \$446,307
Customers	11,441	
Volunteers	2,297 . . .	including 127 judges, or 30% of active judges in the Massachusetts courts
Programs	692	
In Boston (including 35 PLI groupcasts)	294	
Around the Commonwealth	50	
Webcasts	348	
Program registrations	21,734 . . .	+18%
In-person	10,723	
Webcast registrations (including 7,945 WLEC registrations)	9,864	
Program recordings (CDs, mp3 downloads)	1,147	
Publications sales	18,234 . . .	+8%
Print Books	10,352	
eBooks	136	
Supplements	7,571	
MCLE OnlineLibrary™ subscriptions	175	
Commission/Royalties	\$377,499	
PLI groupcasts, WestLegal EdCenter webcasts, Aspen, Lexis and West book royalties		
Sponsor membership dues	\$249,795 . . .	9,135, or 20% of the actively practicing bar, benefit from MCLE Sponsor Membership
Facility rentals	\$186,178	
Fundraising gifts	\$351,117	
Campaign total	\$2,329,03993% of \$2.5 million goal
Scholarships	1,570 . . .	14% of in-person registrations
Pro bono and legal services tuition vouchers	1,177	
Needs-based	393	

MCLE Strategic Agenda 2015

Conduct institutional outreach to new lawyers

*Pathways to Practice,
Practicing with Professionalism Initiatives*

Promote MCLE's online presence

*Webcasts, mp3 Recordings,
MCLE OnlineLibrary™, eBooks*

Position MCLE as a regional, New England CLE provider

*MCLE | New England® Publishing and
Webcast Initiatives*

Grow scholarship endowment

*Pro Bono Scholarship Fund,
Foundation Grants and Legacy Giving Initiatives*

This summary is intended to provide a snapshot of MCLE's initiatives and performance during FY 2011. Where included, percentages indicate the change this year to date as compared to the same time period last year.

Programs and books by practice area 2010–2011

BUSINESS & COMMERCIAL LAW

PROGRAMS

Accounting & Finance for Lawyers
Acquiring or Selling the Privately Held Company: PLI Boston Groupcast
Advanced Securities Law Institute: PLI Boston Groupcast
Advanced Software Licensing
Advertising Law
Advising Small Businesses in the "New Normal"
Asset Based Financing in Today's Economy: PLI Boston Groupcast
Avoiding Mistakes Commonly Made by Consumer Bankruptcy Attorneys
Banking Law Institute 2010: PLI Boston Groupcast
Bankruptcy & Reorganizations: PLI Boston Groupcast
Bankruptcy Fundamentals
Bankruptcy Law: MCLE BasicsPlus!®
Basics of Accounting for Lawyers: PLI Boston Groupcast
"Bet the Company" Litigation: PLI Boston Groupcast
Building Business Organizations: LLCs, LLPs, Limited Partnerships, & Corporations
Business BootCamp for Lawyers
Business Lawyer's Guide to Taxation of Business Entities
Business Valuation
Confidentiality Agreements: New England In-House Counsel Briefing
Consumer Financial Services Institute: PLI Boston Groupcast
Contract Review, Negotiation & Analysis: New England In-House Counsel Briefing
Copyright & Trademark Law: PLI Boston Groupcast
Copyright, Privacy & Defamation in Cyberspace
Corporate Governance: PLI Boston Groupcast
Corporate Practice: MCLE BasicsPlus!®
Creditors' & Consumers' Rights & Remedies
Current Trends in Biotechnology & Life Sciences Practice
Delaware Law Developments: PLI Boston Groupcast
Developments in Pharmaceutical & Biotech Patent Law: PLI Boston Groupcast
Directors' Institute on Corporate Governance: PLI Boston Groupcast
Doing Deals in and with Emerging Markets: PLI Boston Groupcast
Doing Deals--The Art of M&A Transactional Practice: PLI Boston Groupcast
Drafting & Negotiating Corporate Agreements: PLI Boston Groupcast

Enforcing Security Interests in Personal Property
Fiduciary Duties & Conflicts: New England In-House Counsel Briefing
Financial Products Survey 2011: PLI Boston Groupcast
Fundamentals of Broker-Dealer Regulation: PLI Boston Groupcast
Fundamentals of Mutual Funds and Exchange-Traded Funds: PLI Boston Groupcast
Fundamentals of SWAPS & Other Derivatives: PLI Boston Groupcast
Guide to Financial Institutions: PLI Boston Groupcast
Handling Commercial Loan Transactions
Health & Hospital Law: MCLE BasicsPlus!®
Hedge Fund Enforcement & Regulatory Developments: PLI Boston Groupcast
Hedge Funds: Strategies and Structures for an Evolving Marketplace: PLI Boston Groupcast
How to Draft Incorporation Documents & LLC Agreements
How to Organize a Privately Owned Business
Immigration Law: MCLE BasicsPlus!®
Intellectual Property: MCLE BasicsPlus!®
Licensing Agreement Fundamentals
LLCs Demystified
Mergers & Acquisitions 2011: PLI Boston Groupcast
Negotiating & Renegotiating Contracts
New Developments in Securitization: PLI Boston Groupcast
New England Bankruptcy Law Conference
New England Business & Securities Law Conference 2010
4th Annual New England Family & Closely Held Business Law Conference 2011
12th Annual New England Hospital & Health Law Conference 2011
10th Annual New England Immigration Law Conference 2011
14th Annual New England Intellectual Property Law Conference 2011
12th Annual New England Nonprofit Law Conference 2011
Outsourcing 2010: Structuring, Negotiation & Governance: PLI Boston Groupcast
Overview of the Financial System Overhaul
Private Equity Forum: PLI Boston Groupcast
Private Placements & Other Financing Alternatives: PLI Boston Groupcast
Protecting Proprietary Information

Representing Nonprofits: MCLE BasicsPlus!®
Representing Physicians, Health Care Providers & Medical Groups in the Post Health Care Reform Era
Securities Arbitration: PLI Boston Groupcast
Securities Regulations for Small Business
Small Business Law Practice: MCLE BasicsPlus!®
The Means Test & Other Common Consumer Bankruptcy Minefields
Trying Your "1st" (or Next) Bankruptcy Case
Understanding the Securities Laws: PLI Boston Groupcast
Update on Immigration Enforcement at the Worksite
Venture Capital Nuts & Bolts: PLI Boston Groupcast
What Every Lawyer Needs to Know About Insurance Coverage

BOOKS

Advising a Massachusetts Business
Alcohol, Food Service and Entertainment Licensing
Buying and Selling a Privately Owned Business in Massachusetts
Drafting and Negotiating Massachusetts Contracts
Drafting Commercial Documents in Massachusetts
Due Diligence in Massachusetts
Financing a Business in Massachusetts
Guidebook for Boards of Directors of Massachusetts Nonprofits
Massachusetts Health and Hospital Law Manual
Intellectual Property Licensing Agreements
Intellectual Property Practice
Moving for Relief from the Automatic Stay in Bankruptcy
Massachusetts Nonprofit Organizations
Obtaining, Using and Protecting Trademarks
Organizing and Dissolving a Massachusetts Business
A Practical Guide to Consumer Bankruptcy
A Practical Guide to Massachusetts Limited Liability Companies
A Practical Guide to Organizing a Business in Rhode Island
Protecting and Enforcing Copyright
Protecting Trade Secrets
Taking and Enforcing Security Interests in Personal Property

CIVIL LITIGATION

PROGRAMS

2nd Annual ADR & the Law Conference
Advanced Deposition Techniques & Technology

Automobile Liability Insurance Update 2011
Civil Deposition Practice: MCLE BasicsPlus!®
Civil Discovery Practice: MCLE BasicsPlus!®
Civil Motions Practice Workshop
Contract Disputes & Litigation
David Gross on How to Win Your Next Trial Using the Power Trial Method
Effective Appellate Advocacy
Evaluating, Settling & Trying Personal Injury Cases: MCLE BasicsPlus!®
Federal Court "Summer Camp"
Federal Court Judicial Forum 2011
Handling Motor Vehicle Accident Cases
Insurers, Insureds & Their Lawyers
Intellectual Property Litigation Interference with Business Relations
Introducing & Excluding Evidence at Trial
Judgment Collection Strategies
Making Your Discovery Plan Work
10th Annual New England Business Litigation Conference 2011
1st Annual New England Civil Trial Advocacy Conference 2011
14th Annual New England Personal Injury Law Conference 2011
On Trial with Judge Young
Pozner & Dodd on "Killer" Cross-Examination
Premises Liability Litigation
Preparing & Trying Chapter 93A & 176D Cases
Preparing and Using Lay & Expert Witnesses
Pretrial Litigation: MCLE BasicsPlus!®
Pretrial Preparation
Protecting Privileges for In-House Attorneys & Corporate Litigators
Single Justice Practice
Small Claims, Big Results
Superior Court Judicial Forum 2010
Taking Depositions Workshop
Technology-Enhanced Trial Advocacy with Judge O'Toole
Trial Advocacy Workshop
Trying Cases to Win: Principles Uniform from Coast to Coast
Trying Your "1st" (or Next) Civil Case in the Superior Court
Winning Your Case Before Trial

BOOKS

Appellate Practice in Massachusetts
Business Torts in Massachusetts
Chapter 93A Rights and Remedies
Civil Causes of Action in Massachusetts
Collecting Civil Judgments
Massachusetts Courtroom Advocacy
Damages, Interest and Attorney Fees in Massachusetts Litigation

Programs

294 in Boston
50 around the Commonwealth
348 webcasts

21,734 Registrations

10,723 in person (49%)
9,864 webcasts (45%)
1,147 audio recordings (5%)

Massachusetts Deposition Practice Manual
Massachusetts Discovery Practice
Massachusetts District Court Civil Practice Manual
Massachusetts E-Discovery and Evidence: Preservation Through Trial

A Practical Guide to Evidence in New Hampshire
A Practical Guide to Evidence in Rhode Island
A Practical Guide to Introducing Evidence in Massachusetts
Pursuing a Case in Small Claims Court

156 book titles

including 11 new titles, 43 supplements and revisions

18,234 Sales

Book and supplement sales

Effective Deposition Strategies and Techniques
Massachusetts Evidence: A Courtroom Reference
Massachusetts Expert Witnesses
Federal Civil Litigation in the First Circuit
Massachusetts Guide to Evidence
Judge Sentences: Tales from the Bench
Massachusetts Liability Insurance Manual
Massachusetts Motor Vehicle Torts
Moving for Injunctive Relief
Obtaining and Using Medical Records in Massachusetts
Massachusetts Personal Injury Law Sourcebook & Citator
Pocket Guide to Massachusetts Evidence
A Practical Guide to Discovery and Depositions in Connecticut
A Practical Guide to Discovery & Depositions in Rhode Island
A Practical Guide to Discovery and Depositions in New Hampshire

Massachusetts Superior Court Civil Practice Forms
Massachusetts Superior Court Civil Practice Jury Instructions
Massachusetts Superior Court Civil Practice Manual
Massachusetts Tort Law Manual
The U.S. District Court Speaks
Winning Through Settlement

CRIMINAL LAW

PROGRAMS

CPCS Trying Sex Offender Registry Board Cases Certification Training
CPCS Zealous Advocacy in the District & Juvenile Courts Certification Training
11th Annual Criminal Law Conference
Essential Developments under Melendez-Diaz
Evidentiary Issues in District Court Criminal Practice & Procedure

Going Through the (Criminal) Motions
Habeas Corpus in the Federal Court
Handling Drug Cases
Handling Sexual Assault Cases from Investigation to Trial
Hardly Common Defenses to Common, But Hard, Criminal Cases
Litigating Wrongful Convictions in Massachusetts
Massachusetts Auto Stops
OUI Summit 2010
Post-Conviction Relief & Appellate Advocacy
Prosecuting & Defending Homicide Cases
Recent Developments in Criminal Law 2011
The Most Important Recent Developments in Evidence Law for Criminal Cases
Warrant & Warrantless Search & Seizure

BOOKS

Massachusetts Arrest, Search and Seizure Citator
CPCS Mental Health Proceedings in Massachusetts
CPCS Training Manual for Criminal Defense
Crime and Consequence: The Collateral Effects of Criminal Conduct
Massachusetts Criminal Law Sourcebook & Citator
Criminal Model Jury Instructions for Use in the District Court
Massachusetts District Court Criminal Defense Manual
Massachusetts Juvenile Court Bench Book
Massachusetts Motor Vehicle Offenses
Obtaining, Enforcing and Defending Chapter 209A Restraining Orders
A Practical Guide to Trying DUI Cases in Rhode Island
A Practical Guide to Trying DWI Cases in New Hampshire
Sex Offender Registry Practice
Massachusetts Superior Court Criminal Practice Jury Instructions
Massachusetts Superior Court Criminal Practice Manual
Trying Drug Cases in Massachusetts
Trying Murder and Other Homicide Cases in Massachusetts
Trying OUI Cases in Massachusetts
Trying Sex Offense Cases in Massachusetts

EMPLOYMENT & LABOR LAW

PROGRAMS

Drafting & Enforcing Employment Contracts & Severance Agreements

Employee Selection Exams & Criteria in the Hiring & Promotion of Private & Public Sector Employees
Employment & Labor Law: MCLE BasicsPlus!®
Employment Discrimination Update & Cutting Edge Theories
13th Annual Employment Law Conference 2010
Employment Law for Business Lawyers & In-House Counsel
Employment Law Landmines in Social Media
Handling Workplace Challenges at Small Companies & Startups
Independent Contractor vs. Employee
Litigating Wage & Hour Cases
Mock Trial of a MCAD Sexual Harassment & Retaliation Case
Proving & Valuing Damages in Employment Cases
Taking & Defending a Dynamite Deposition in Your Next Employment Case
The Evolving World of ERISA: PLI Boston Groupcast
Top 5 Employment Law Trends It Pays to Know
What Employment Lawyers Need to Know About Other Practice Areas
What Every Lawyer Needs to Know About Employment Law
What Every Workers' Comp Lawyer Needs to Know About Anatomy, Medicine, Pain Management & Psychiatric Disabilities
11th Annual Workers' Compensation Law Conference
Workers' Compensation: MCLE BasicsPlus!®

BOOKS

ADA, G.L. c. 151B, FMLA, and Workers' Compensation in Massachusetts
Drafting Employment Documents in Massachusetts
Employment Discrimination in Massachusetts
Massachusetts Employment Law
Massachusetts Employment Law Sourcebook & Citator
Hiring and Firing in Massachusetts
Negotiating, Drafting and Enforcing Noncompetition Agreements & Related Restrictive Covenants
A Practical Guide to Workers' Compensation in Rhode Island
Representing a Plaintiff in a Wrongful Termination Case
Representing Clients Before the MCAD in Employment Cases
Massachusetts Wage and Hours Handbook
Workers' Compensation in Massachusetts

ESTATE PLANNING & ADMINISTRATION

PROGRAMS

Advanced Issues in Trust Administration
 ALI-ABA Sophisticated Estate Planning Techniques
 Basic Estate Planning & Estate Tax Issues in the New Environment
 Beyond Trust Drafting 101
 Design & Drafting of an Asset Protection Estate Plan for Massachusetts Clients
 Drafting Estate Plans Under the New MUPC
 Elder Law: MCLE BasicsPlus!®
 Estate Administration & Post-Mortem Estate Planning
 Estate Planning for the Moderate Estate
 Estate Planning: MCLE BasicsPlus!®
 Fiduciary Income Taxation of Estates & Trusts: MCLE BasicsPlus!®
 Guardianship & Conservatorship Handling SSI & SSDI Claims
 Handling the "Simple" Estate Plan
 Latest Techniques for Middle Class Estates
 Medicaid Planning & Irrevocable Medicaid Trusts
 12th Annual New England Elder & Disability Law Conference 2011
 12th Annual New England Estate Planning Conference 2011
 New MUPC Guardianship & Conservatorship Update 2011
 Pooled Disability Trusts
 Preparing Fiduciary Income, Gift & Estate Tax Returns
 Preserving & Transferring Your Client's Principal Residence
 Probate Practice: MCLE BasicsPlus!®
 Special Needs Trusts
 The Impact of the Tax Relief Act of 2010 on Estate Planning
 Will & Trust Drafting Techniques
 Year End Gifts & Estate Planning Opportunities

BOOKS

Drafting Estate Plans
 Drafting Irrevocable Trusts in Massachusetts
 Drafting Wills and Trusts in Massachusetts
 Estate Planning for the Aging or Incapacitated Client in Massachusetts
 Fiduciary Litigation in the Probate Court
 Guardianship and Conservatorship Practice Under the Massachusetts Uniform Probate Code
 Legal Rights of Individuals with Disabilities
 A Practical Guide to Estate Planning in Massachusetts
 A Practical Guide to Probate in Rhode Island
 Preparing Fiduciary Income, Gift, and Estate Tax Returns

The Probate and Administration of Estates in Massachusetts, 3rd Edition 2006

Massachusetts Probate Manual
 Understanding and Using Trusts

FAMILY & MENTAL HEALTH LAW

PROGRAMS

Alimony Summit 2010
 Alimony Trends & Theories
 Calculating Divorce: It's Getting Personal!
 CPCS CAFL Appellate Advocacy Certification Training
 CPCS CAFL Children & Family Law Trial Panel Certification Training
 CPCS CAFL Representing Youth in CHINS Cases Certification Training
 CPCS Mental Health Litigation Certification Training
 Divorce Finance Summit 2011
 Divorce Law: MCLE BasicsPlus!®
 Family Court Judicial Forum
 Family Law Case Update 2011
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547 Legal services

393 Private practitioners with financial need

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**Thomas C. Federico**

*Partner, Morrison
Mahoney LLP,
Boston*

An exceptional trial advocate, a dedicated mentor of young lawyers, and a devoted family man, he left an indelible mark on all those around him with his modesty, intelligence, charm and warmth.

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- 2010–2011 16

Fund balance \$58,066

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Hon. Frank H. Freedman

*Chief Judge,
U.S. District Court,
District of
Massachusetts*

An even-handed and patient jurist who, as mayor of Springfield in the 1960s, worked to assuage the city's racial tensions.

SCHOLARSHIPS AWARDED

- 2010–2011 4
- 2003–2011 32

Fund balance \$9,955

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Hon. Edward M. Ginsburg

*Associate Justice,
Middlesex Probate
and Family Court*

A judge whose respect for families was evidenced by his long service on the Probate & Family Court bench. He founded the *pro bono* initiative, Senior Partners for Justice.

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- 2010–2011 11
- 2002–2011 91

Fund balance \$28,850

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Hon. Edward F. Hennessey

*Chief Justice,
Supreme Judicial
Court*

A trial and appellate judge, whose thoughtful commentaries on Massachusetts's bench, bar and courts have become part of the Commonwealth's legal literature.

SCHOLARSHIPS AWARDED

- 2010–2011 13
- 2001–2011 114

Fund balance \$35,252

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Edward F. Hines, Jr.

*Founding Partner,
Hines & Corley LLP,
Lexington; Partner,
Choate, Hall & Stewart, Boston*

A gifted lawyer, he successfully blended a legal career with an exemplary commitment to service and charity, demonstrated unparalleled generosity and could fill a room with his overflowing warmth.

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- 2010–2011 50
- 2006–2011 246

Fund balance \$130,754

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Partner, Rubin and Rudman LLP, Boston; Founding Partner, White Inker Aronson, PC, Boston

An impassioned advocate who promoted equity and fairness for families.

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- 2010–2011 39
- 2006–2011 158

Fund balance \$98,543

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Austin W. Jones, Jr.

Chief Deputy Clerk, U.S. District Court, District of Massachusetts

Known for his warmth and geniality, he served the court with pride for over thirty years and treated everyone with courtesy, respect, equality and fairness.

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- 2010–2011 10
- 2009–2011 20

Fund balance \$25,000

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Partner, Rackemann, Sawyer & Brewster, Boston

A meticulous lawyer with great passion for the practice of law, his work on such legislation as Chapter 121A and real estate developments like the Prudential Center set the pace for urban renewal in Boston. Dogged in his pursuit of the right result for his clients and society and a leader in the area of tidelands law, he brought back to usage titles to numerous waterfront properties to the benefit and enjoyment of many.

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- 2010–2011 29
- 2007–2011 100

Fund balance \$73,700

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Hon. Rudolph Kass

Associate Justice, Appeals Court

A judge whose gift of language is reflected in the carefully reasoned, quick-witted and eloquent decisions he authored. Editor of *Legal Chowder: Lawyering and Judging in Massachusetts*.

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- 2010–2011 11
- 2001–2011 110

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Hon. Robert E. Keeton

District Judge, U.S. District Court, District of Massachusetts; Professor, Harvard Law School

As a brilliant scholar and educator in the areas of insurance law, torts and trial tactics, he inspired generations of law students and lawyers. As a judge, he presided over sensitive cases with a sharp intellect, penetrating wisdom, and a caring nature.

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- 2010–2011 17
- 2007–2011 63

Fund balance \$44,895

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Gitta M. Kurlat

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A lawyer's lawyer, dedicated to the highest ideals of the profession, and an entrepreneur actively involved in furthering the development and use of innovative technologies.

SCHOLARSHIPS AWARDED
 ■ 2010–2011 20
 ■ 2007–2011 80
Fund balance. \$50,000

DONORS
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Hon. A. David Mazzone

*District Judge, U.S.
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Massachusetts

A jurist whose landmark decisions reflected high intellect, social responsibility and human compassion.

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 ■ 2010–2011 17
 ■ 2005–2011 102
Fund balance. \$46,765

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*MCLE's Founding
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MCLE's founder and consulting director. In 1969, he envisioned an organization that would meet lawyers' needs for practical continuing legal education in Massachusetts.

SCHOLARSHIPS AWARDED
 ■ 2010–2011 53
 ■ 1999–2011 429
Fund balance. \$168,747

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Hon. John J. Moynihan

First Justice, Worcester Probate and Family Court

As a lawyer, he served as a mentor to many and was instrumental in developing the Worcester County Bar Advocate Program. As a judge known for his gentle nature and compassion, he took a personal interest in people and their problems, relished the idea of serving others, and always had time to lend a helping hand.

SCHOLARSHIPS AWARDED
 ■ 2010–2011 20
 ■ 2006–2011 78
Fund balance. \$50,000

DONORS
 Created with generous contributions from the Hermann Foundation.



Hon. Beatrice H. Mullaney

Associate Justice, Bristol County Probate and Family Court

A woman who broke barriers, while giving much to the families who appeared before her.

SCHOLARSHIPS AWARDED
 ■ 2010–2011 10
 ■ 2005–2011 60
Fund balance. \$26,300

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Hon. James F. Queenan, Jr.

U.S. Bankruptcy Court, District of Massachusetts

A leader in the Worcester and bankruptcy bars, who, as Chief of the US Bankruptcy Court, demonstrated patience, fairness, and geniality toward all who appeared before him.

SCHOLARSHIPS AWARDED
 ■ 2010–2011 6
 ■ 2007–2011 24
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Partner, Robinson Donovan, PC, Springfield, MA

The embodiment of professionalism and a force in labor and employment law, he approached everything he did with a commitment to excellence.

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Hon. Herbert P. Wilkins

*Chief Justice,
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Hon. William G. Young

*Chief Judge, U.S.
 District Court,
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A jurist gifted in the ability to share his love of the law with others. A natural leader and skilled storyteller.

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