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Live and Online Programs

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9th Annual Cannabis Law Conference 2025

Emergent corporate, regulatory, financing, and business considerations for cannabis practitioners

Nationally, the cannabis industry continues to experience unprecedented growth. Despite increasing numbers of states having legalized cannabis in some form, as well as widespread public approval for federal cannabis reform, the interplay between complex state regulatory schemes and continued federal prohibition continues to pose inherent legal uncertainties.

Counsel for marijuana or hemp businesses must address unique legal issues relating to regulatory compliance, state and local licensing, financing restraints, and federal prohibition and policy, while also addressing standard business law issues. This *Conference* analyzes advanced emerging topics in the cannabis industry pertinent to business law practitioners—including challenges, opportunities, and strategies encountered in licensing, permitting, compliance, debt and equity financing, mergers and acquisitions, and tax considerations—and the panel also discusses the emerging focus on psychedelics and the state level movement to legalize such use. Hear the latest from expert panelists who provide insight into the complex business and legal issues underlying cannabis business operations.

Agenda

- **State of the Commonwealth and State of the Industry Post-Election**
- **Regulatory Roundtable**
 - A moderated discussion with counsel for regulatory bodies dealing with the cannabis industry
- **In-House Counsel Roundtable**
 - A moderated discussion with in-house counsel about the legal issues facing companies and the industry
- **Rescheduling**
- **New Tax Issues: Rescheduling, 280E Opinion Letters, and 471(c)**
- **“Ask the Experts” Q&A Session**

Faculty

Adam D. Fine, Esq., *Vicente LLP, Boston, Cochair*

Scott H. Moskol, Esq., *Burns & Levinson LLP, Boston, Cochair*

Elliot Choi, Esq., *Deputy General Counsel, C3 Industries, New York, NY*

Jessica H. Burgess, Esq., *Department of Agricultural Resources, Commonwealth of Massachusetts*

Andrew Carter, Esq., *Acting General Counsel, Cannabis Control Commission, Commonwealth of Massachusetts*

Mitzi S. Keating, CPA, CFE, *Citrin Cooperman, Providence, RI*

Michael P. Ross, Esq., *Prince Lobel Tye LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, April 3, 2025

1:00 pm–5:00 pm

Program Number: 2250155WBC

REBROADCAST

Friday, April 25, 2025

9:00 am–1:00 pm

Program Number: 2250155RB1

REBROADCAST

Monday, May 5, 2025

10:00 am–2:00 pm

Program Number: 2250155RB2

ON DEMAND WEBCAST

View after Monday, May 5, 2025

Program Number: 2250155WBA

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Materials

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26th Annual Nonprofit Law Conference 2025

Hot topics in nonprofit law to keep your practice cutting edge

Agenda

- **Year in Review**
 - Current status of proposed updates to donor-advised fund regulations and how they may affect nonprofit clients; Changes that may be on the horizon for nonprofits in light of the 2024 presidential election; Significant updates from this year that nonprofit attorneys need to know
- **Diversity, Equity, Inclusion & Belonging (DEIB) for Nonprofit Lawyers**
 - How DEIB efforts in nonprofits have been impacted by the U.S. Supreme Court's recent affirmative action decisions and their aftermath; Initiatives being taken by nonprofits that are consistent with this new legal landscape
- **Labor & Employment Law for Nonprofits**
 - The latest developments in employment and labor law: learn how they may uniquely impact nonprofit organizations, and how to mitigate risk and spot legal issues in today's political and cultural climate
 - Wage and hour decisions and considerations; FLSA compliance: compensation and employee classification; pay transparency laws; multi-state employer legal considerations; employee rights, the NLRB and unionization efforts; and the impact of the U.S. Supreme Court's affirmative action decisions on labor and employment issues
- **Fiscal Sponsorships**
 - Fiscal sponsorships can assist unincorporated and non-exempt entities in raising charitable dollars. Hear about the benefits and drawbacks to entering into a fiscal sponsor relationship, and learn the key provisions needed for a solid fiscal sponsor agreement. The panelists also discuss the primary legal issues that may arise at the conclusion of fiscal sponsorship and how to address them.
- **Real Property Law Considerations for Nonprofits**
 - Many nonprofit organizations hold or are gifted real property. Learn about relevant real property considerations for nonprofit organizations, including the Massachusetts charitable property tax exemption, the Dover Amendment, and choice of entity considerations.
- **Updates from the Massachusetts Attorney General's Office**
 - Hear Emily Gabrault, Deputy Chief of the Non-Profit Organization/Public Charities Division at the Massachusetts Attorney General's Office, discuss trends in the Division's work and important regulatory updates.

Faculty

Drew S. Douglas-Steele, Esq., *Casner & Edwards LLP, Boston*, Cochair; Valerie R. Sussman, Esq., *Hurwit & Associates, Newton*, Cochair; Brad Bedingfield, Esq., *Hemenway & Barnes LLP, Boston*; Kathleen A. Berney, Esq., *Hirsch Roberts Weinstein LLP, Boston*; Jocelyn A. Bishop, Esq., *Hurwit & Associates, Newton*; Laurie R. Bishop, Esq., *Hirsch Roberts Weinstein LLP, Boston*; Peter A. Caro, Esq., *Casner & Edwards LLP, Boston*; Emily Tassinari Gabrault, Esq., *Office of the Attorney General, Public Charities Division, Commonwealth of Massachusetts*; Amber M. Koonce, Esq., *Assistant Counsel, NAACP Legal Defense Fund, Washington, DC*; Alyssa Rayman-Read, Esq., *HR Solutions at Work, Beverly*; Carla A. Reeves, Esq., *Goulston & Storrs, PC, Boston*; Harrison (Colby) Rogers, Esq., *Ropes & Gray LLP, Boston*; Elka T. Sachs, Esq., *Krokidas & Bluestein LLP, Boston*



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LIVE WEBCAST

Wednesday, April 9, 2025
9:30 am–4:00 pm
Program # 2250153WBC

REBROADCAST

Thursday, April 24, 2025
9:30 am–4:00 pm
Program # 2250153RB1

REBROADCAST

Friday, May 2, 2025
9:30 am–4:00 pm
Program # 2250153RB2

ON DEMAND WEBCAST

View after Friday, May 2, 2025
Program # 2250153WBA

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Materials

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CLE Credits

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Accounting & Finance Core Fluency

Advance client goals by understanding the numbers that affect lawyers

Accounting terms and concepts, financial statements, and basic finance are often misunderstood and confusing. The panelists explain the terms and jargon, basic accounting concepts, generally accepted accounting standards, and nuts and bolts of financial statements. You receive a complete pro forma set of financial statements, including a detailed explanation of the components and how they relate. The faculty teaches you how to recognize “red flags” in financial statements—and avoid mistakes often made by attorneys when advising clients. Get clear explanations and answers to common accounting questions that your clients ask—so you can advise clients with confidence.

Business lawyers, corporate lawyers, family law practitioners, and litigators often find themselves challenged to confidently explain financial statements to clients, or to use accounting information to prove a liability or damages, or even to impeach a witness. While engaging an accounting expert is useful, a lawyer must know the basics of accounting to effectively choose and utilize an expert. Whatever your specialty, you must understand financial concepts to understand your client’s goals, and the interests of other parties to the deal.

Agenda

- **The Basics:** Cash basis v. accrual basis and other important accounting concepts; Audits, reviews, and compilations—do the different reports matter? Who reads financial statement note disclosures? You should!
- **Unlocking the Mysteries of Accounting:** Public accountants, certified public accountants, and enrolled agents—how to use these experts effectively
- **Bank Financing:** What banks want to see when lending money; Covenants, ratios, warranties, and representations
- **Taxation:** Understanding common entity structures; High-level analysis of recent legislation and how that affects small business; Which tax credits or deductions might a small business qualify for? Individual taxation at-a-glance
- **Business Valuation:** Overview of valuation concepts and approaches; Valuation is purpose-specific; The continuum of value; Valuation—a qualitative and quantitative process
- “Ask the Experts” Q&A Session

Faculty

Kimberley A. Train, CPA/ABV, PKF O’Connor Davies, Boston, Chair
Joel I. Rothenberg, CPA, JD, LLM, PKF O’Connor Davies, Boston

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, May 15, 2025
9:00 am–12:00 pm
Program # 2250156WBC

REBROADCAST

Friday, May 30, 2025
9:30 am–12:30 pm
Program # 2250156RB1

REBROADCAST

Monday, June 9, 2025
1:00 pm–4:00 pm
Program # 2250156RB2

ON DEMAND WEBCAST

View after Monday, June 9, 2025
Program # 2250156WBA

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Artificial Intelligence Symposium 2025

Guiding the governance structures prior to the use of AI tools

Generative artificial intelligence (“Artificial Intelligence”) provides significant opportunities for workplace productivity enhancements. The deployment, development, and use of Artificial Intelligence is critical to the future of all current and future businesses. Unfortunately, the successful deployment of Artificial Intelligence tools and workflows is not guaranteed, and time is of the essence. Artificial Intelligence governance structures are tools that can provide organizations with a framework to develop the processes and protocols necessary to manage the deployment, development, and use of Artificial Intelligence tools.

The successful deployment of Artificial Intelligence tools at scale requires considerable legal, administrative, and technical resources. Robust legal, managerial, and technical protocols are necessary to develop short-term and long-term goals, benchmark systems, and manage risk. Artificial Intelligence governance structures are robust and meaningful policies that explicitly govern how an organization manages the adoption, use, and implementation of Artificial Intelligence technologies. Such governance policies can help an organization manage and assess the risks and benefits of its Artificial Intelligence ecosystem in light of emerging laws, new technologies, and software trials.

In the legal industry, Artificial Intelligence governance structures are particularly helpful because Artificial Intelligence presents novel challenges for attorneys. All attorneys must be aware of the risks inherent to the use and operation of Artificial Intelligence. Jurisprudence, regulations, and legal perspectives governing Artificial Intelligence are rapidly evolving at the state, federal and international levels. The rapid integration of Artificial Intelligence into a broad range of technologies, products, and services suggests that the use, operation, and ownership of Artificial Intelligence technologies may become a facet in a broad array of legal matters ranging from transactional law to constitutional law. Artificial Intelligence governance structures are likely to be an invaluable resource for law firms and attorneys.

The primary goal of the *Symposium* is to provide attorneys with knowledge, strategies, and practical perspectives to guide the adoption of Artificial Intelligence governance structures prior to the use of Artificial Intelligence tools.

Agenda

- State of Domestic and International Artificial Intelligence Laws and Regulations
- Perspectives on the Ethical Use of Artificial Intelligence by Attorneys
- Adoption and Implementation of an Artificial Intelligence Governance Structure
- Guidance Regarding the Deployment and Development of Artificial Intelligence Tools by Attorneys
- Emerging Trends in Artificial Intelligence
- “Ask the Experts” Q&A Session

Faculty

Andrew Sutton, Esq., *McLane Middleton, Woburn*, Chair

John F. Weaver, Esq., *Artificial Intelligence Practice, McLane Middleton, Woburn*



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LIVE WEBCAST

Thursday, June 5, 2025

12:30 pm–4:30 pm

Program # 2250154WBC

REBROADCAST CC

Friday, June 20, 2025

9:00 am–1:00 pm

Program # 2250154RB1

REBROADCAST CC

Monday, June 30, 2025

12:00 pm–4:00 pm

Program # 2250154RB2

ON DEMAND WEBCAST CC

View after Monday, June 30, 2025

Program # 2250154WBA

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Business Valuation & the Law

Methodologies used to assess business value and business damages

Join us online to explore the critical intersection of business valuation principles and legal practice. The faculty provide an overview of methodologies used to assess business value and business damages, while highlighting key variables that influence valuations that are often fertile ground for dispute. Understanding these concepts is essential for attorneys navigating legal matters, from mergers and acquisitions to disputes involving business damages.

Our expert panelists share real-world examples and best practices, equipping attorneys with the knowledge to address complex valuation issues effectively. Whether you are involved in commercial litigation, corporate law, or any practice area where business valuation is pertinent, this program provides valuable tools to help you advocate for your clients.

Agenda

- Business Valuation Overview
- Basic Elements of Valuation
- Valuation Approaches and Methodology
- Valuation in Legal Matters
- Key Variables Impacting Value and Common Areas of Dispute

Faculty

Danniel J. Baer, CFA, CPA/ABV, *Floyd Advisory LLC, Boston*, Chair
Robert W. Lashway, CPA/ABV/CFF, *Floyd Advisory LLC, Boston*
Melanie V. Woodward, Esq., *Nutter McClennen & Fish LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, April 10, 2025
12:00 pm–1:30 pm
Program # 2250392WBC

REBROADCAST

Friday, April 25, 2025
9:00 am–10:30 am
Program # 2250392RB1

REBROADCAST

Monday, May 5, 2025
3:00 pm–4:30 pm
Program # 2250392RB2

ON DEMAND WEBCAST

View after Monday, May 5, 2025
Program # 2250392WBA

Tuition *(includes written materials)*

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Common LLC Oversights & Mistakes

Maximizing benefits of LLCs by avoiding pitfalls

The limited liability company form has numerous advantages and can be beneficial from a corporate governance and tax perspective. But while LLCs are forgiving, business owners need to exercise care when establishing and operating their limited liability company to avoid common mistakes that could create headaches or hurdles in the long run. This program reviews frequent pitfalls and common mistakes and explains how to avoid them.

Agenda

- What Is an LLC and What Are the Benefits?
- Formation Considerations
- Governance Considerations
- Operational Considerations
- Tax and Accounting Issues
- Exits for LLCs

Faculty

Kate R. Henry, Esq., *Nutter McClennen & Fish LLP, Boston*, Cochair
Elizabeth S. Myers, Esq., *Nutter McClennen & Fish LLP, Boston*, Cochair

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, April 2, 2025
12:00 pm–2:00 pm
Program # 2250157WBC

REBROADCAST

Thursday, April 17, 2025
2:00 pm–4:00 pm
Program # 2250157RB1

REBROADCAST

Friday, April 25, 2025
9:00 am–11:00 am
Program # 2250157RB2

ON DEMAND WEBCAST

View after Friday, April 25, 2025
Program # 2250157WBA

Tuition *(includes written materials)*

- \$175
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Materials

A Practical Guide to Massachusetts Limited Liability Companies ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Counseling Clients Through an M&A Deal

Pre-transaction considerations to post-transaction integration

Learn about the lifecycle of a mergers and acquisitions (M&A) transaction, focusing on key phases where counsel and the deal team play critical roles in advising buyers and sellers. Learn best practices for negotiation, drafting transaction documents, and handling post-closing obligations to effectively guide your clients.

Agenda

- **Pre-Transaction Considerations**
 - Understanding Client Objectives: Assessing client's business and strategic goals; Determining transaction type (asset purchase, stock purchase, merger)
 - Conducting Initial Due Diligence: Reviewing the financial and legal status of the target company; Identifying potential liabilities or deal-breakers
 - Structuring the Deal: Tax considerations for both buyers and sellers; Regulatory concerns (antitrust, securities laws, etc.)
- **Preparing for the Transaction**
 - Drafting Letters of Intent: Key terms (price, payment structure, timeline); Binding v. non-binding provisions
 - Confidentiality and Exclusivity Agreements: Protecting sensitive information during negotiations; Managing exclusivity periods
 - Planning the Due Diligence Process: Gathering documentation (financials, contracts, IP, employment matters); Understanding seller and buyer responsibilities in providing information
- **Negotiating and Drafting Transaction Documents**
 - Purchase Agreement Key Provisions: Purchase price adjustments (working capital, earn-outs); Representations and warranties: Covenants and conditions precedent to closing
 - Negotiating Indemnification Provisions: Caps, baskets, and survival periods; Specific indemnities for known risks
 - Ancillary Agreements: Employment agreements for key personnel; Non-compete and confidentiality agreements
- **Closing the Transaction**
 - Managing the Closing: Preparing and reviewing closing documents (stock/asset transfers, filings); Coordinating with third parties (lenders, regulators, escrow agents)
 - Final Due Diligence and Closing Conditions: Ensuring all conditions are satisfied before closing; Handling last-minute issues or changes
 - Post-Transaction Integration and Obligations: Transition and integration planning; Aligning corporate cultures and operational systems; Managing employees and contractual obligations
 - Addressing Earn-Outs and Deferred Payments: Structuring post-closing payments tied to performance
- **Handling Post-Closing Disputes**
 - Navigating indemnification claims; Resolving disputes over purchase price adjustments

Faculty

John F. Cohan, Esq., *Gesmer Updegrove LLP, Boston*, Chair; Eric M. Sigman, Esq., *Ruberto, Israel & Weiner, PC, Boston*; Rohan H. Vakil, Esq., *Gesmer Updegrove LLP, Boston*; Richard Weiner, CPA, *AAFCPA, Boston*



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Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, May 8, 2025
1:00 pm–4:00 pm
Program # 2250165WBC

REBROADCAST

Friday, May 23, 2025
9:00 am–12:00 pm
Program # 2250165RB1

REBROADCAST

Monday, June 2, 2025
1:00 pm–4:00 pm
Program # 2250165RB2

ON DEMAND WEBCAST

View after Monday, June 2, 2025
Program # 2250165WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Buying and Selling a Privately Owned Business in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits

Drafting & Negotiating License Agreements

Learn to protect and monetize your clients' IP assets

Drafting and negotiating intellectual property (IP) license agreements is a critical skill for lawyers looking to protect and monetize their clients' IP assets. These agreements involve complex legal and commercial considerations, including the scope of the license, geographic and industry limitations, royalty structures, and enforcement rights. Effective IP licensing requires a deep understanding of the relevant legal frameworks, as well as the ability to anticipate potential disputes and negotiate terms that align with your client's strategic goals. By mastering the art of drafting clear, comprehensive agreements and negotiating favorable terms, you can ensure that your clients maximize the value of their IP while minimizing risks. Whether you are dealing with patents, trademarks, copyrights, or trade secrets, developing expertise in this area can provide your clients with a competitive advantage in today's innovation-driven marketplace.

This new program equips attendees with the essential skills and knowledge needed to confidently draft and negotiate intellectual property license agreements. Participants learn how to structure agreements that clearly define the scope of licensed rights, including exclusivity, territory, and duration. The course covers the intricacies of royalty and payment structures, milestone-based compensation, and audit provisions to ensure proper enforcement and compliance. Explore best practices for drafting clauses related to IP ownership, sublicense rights, and indemnification, as well as how to address confidentiality and dispute resolution. Real-world examples and case studies illustrate common pitfalls and challenges, allowing participants to develop effective negotiation strategies tailored to different types of IP (patents, trademarks, copyrights, and trade secrets). Gain the practical tools needed to protect your clients' IP interests while securing optimal terms in licensing deals.

Agenda

- Analyzing the Relevant Legal Frameworks, Anticipating Potential Disputes and Negotiating Terms That Align with Your Client's Strategic Goals
- Structuring Agreements That Clearly Define the Scope of Licensed Rights, Including Exclusivity, Territory, and Duration
- Best Practices for Drafting Clauses Related to IP Ownership, Sublicense Rights, and Indemnification, as well as How to Address Confidentiality and Dispute Resolution
- Understanding the Intricacies of Royalty and Payment Structures, Milestone-Based Compensation, and Audit Provisions to Ensure Proper Enforcement and Compliance
- "Ask the Experts" Q&A Session

Faculty

Kimberly B. Herman, Esq., *Sullivan & Worcester LLP, Boston*, Chair
Gerry Silver, Esq., *Sullivan & Worcester LLP, New York, NY*



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Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, April 10, 2025
9:30 am–11:30 am
Program # 2250159WBC

REBROADCAST

Friday, April 25, 2025
12:00 pm–2:00 pm
Program # 2250159RB1

REBROADCAST

Monday, May 5, 2025
2:00 pm–4:00 pm
Program # 2250159RB2

ON DEMAND WEBCAST

View after Monday, May 5, 2025
Program # 2250159WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Drafting Commercial Documents in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits

Drafting & Negotiating Vendor Agreements

Optimal strategies for creating effective vendor relationships and managing risk

Vendor agreements are critical in establishing the legal and operational framework between businesses and their service providers. Learn how to draft clear, effective vendor contracts, understand key provisions, and master negotiation tactics that benefit your clients. Hear the faculty discuss essential topics such as defining the scope of work, establishing payment terms, protecting intellectual property, managing liability and indemnity, and resolving disputes. The faculty emphasize strategies for balancing risk allocation and ensuring compliance with applicable laws. This new program not only highlights best practices in contract drafting but also offers practical insights into negotiation techniques that help ensure mutually beneficial agreements while safeguarding clients' interests.

Agenda

- Key Elements of Vendor Agreements
- Risk Management and Liability Considerations
- Intellectual Property and Ownership Issues
- Negotiation Strategies
- Regulatory Compliance and Ethical Considerations
- "Ask the Experts" Q&A Session

Faculty

John F. Cohan, Esq., *Gesmer Updegrove LLP, Boston*, Chair
Zane Fernandez, Esq., *Gesmer Updegrove LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, June 4, 2025
12:00 pm–2:00 pm
Program # 2250163WBC

REBROADCAST

Friday, June 20, 2025
9:00 am–11:00 am
Program # 2250163RB1

REBROADCAST

Thursday, June 26, 2025
2:00 pm–4:00 pm
Program # 2250163RB2

ON DEMAND WEBCAST

View after Thursday, June 26, 2025
Program # 2250163WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Drafting Commercial Documents in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Learn more at www.mcle.org

Drafting More Effective & Flexible Contracts

The competitive edge that all transactional attorneys need

Drafting effective contracts is a basic function of all transactional attorneys. The goal is to draft a contract that accurately reflects the business deal, properly allocates risk, is readily understood, and stands up to hostile, rigorous post-execution examination—while educating your clients and meeting their aggressive timeline. Learn about best practices in drafting and negotiating processes, key terms and conditions, and common pitfalls. Hear what clients expect from outside counsel during negotiations and in codifying deals. Learn how to make the most effective use of current technologies. Hear the faculty explain tried-and-true techniques to remove impasses and discuss the ins-and-outs—from the initial email to the final executable—using practical, modern-world examples and critical analysis.

In a competitive, increasingly-digitized environment with limited resources, the lawyer who efficiently strikes an effective balance between achieving the right level of contractual protection and negotiating to reflect their clients' risk tolerance is most likely to be repeatedly engaged. Bring your questions!

Agenda

- Massachusetts Professional Ethical Rules of Engagement
- Drafting in the Digital Age and Tools of the Trade
- Use of Artificial Intelligence (AI) Tools
- Contract Models and Flexible Contract Structures
- Key Clauses and Drafting Tips
- Modern Software as a Service (SaaS) Agreements
- Frameworks for Professional Services
- Nuisances Under Massachusetts Common Law
- Data Privacy Clauses and Concerns
- Negotiating Archetypes
- “Ask the Experts” Q&A Session

Faculty

Frank S. Maniscalco, Esq., MBA, *Advocate Mercantile LLC, Boston*, Chair

Paul Connors, Esq., MBA, *Right Arrow Legal LLC, Boston*

Sara J. Lyons, Esq., *Advocate Mercantile LLC, Philadelphia, PA*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, April 1, 2025

1:00 pm–4:00 pm

Program # 2250158WBC

REBROADCAST

Wednesday, April 16, 2025

9:00 am–12:00 pm

Program # 2250158RB1

REBROADCAST

Thursday, April 24, 2025

12:00 pm–3:00 pm

Program # 2250158RB2

ON DEMAND WEBCAST

View after Thursday, April 24, 2025

Program # 2250158WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Drafting and Negotiating Massachusetts Contracts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



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Learn more at www.mcle.org

How & Why to Do an F Reorganization

Lawyers' decision tree and roadmap to an F reorganization

Hear a high-level overview of what an F-reorganization is, when it is a useful legal and tax strategy (and when it isn't), and how and when an F-reorganization is typically accomplished. The faculty share tips for guiding clients through the F-reorganization process, along with additional resources as they review whether such a reorganization makes sense in a specific case.

Agenda

- Structure of an F-Reorganization
- Tax Effects of a Reorganization
- Typical Reorganization Scenarios
- Legal and Transactional Considerations
- Tax Considerations
- "Ask the Experts" Q&A Session

Faculty

Steven M. Ayr, Esq., *Casner & Edwards LLP, Boston*, Chair

Matthew J. Woodbury, Esq., *Blais Halpert Tax Partners LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, May 8, 2025

9:30 am–10:30 am

Program # 2250162WBC

REBROADCAST

Friday, May 23, 2025

12:00 pm–1:00 pm

Program # 2250162RB1

REBROADCAST

Monday, June 2, 2025

2:00 pm–3:00 pm

Program # 2250162RB2

ON DEMAND WEBCAST

View after Monday, June 2, 2025

Program # 2250162WBA

Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Members
- \$72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1 CLE credit



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Learn more at www.mcle.org

IRS Form 990, Form 990-PF & Other Charity Filings: The Rules, Risks, & Opportunities

Filing and reporting requirements for nonprofits

In this engaging new program, the panelists cover the basics related to tax exempt organization filing requirements with the IRS, the attorney general, and other regulators. They also discuss common pitfalls and valuable opportunities related to these regulatory filings. Bring your questions!

Agenda

- **Why Filing the Form 990/Form 990-PF Is So Critical**
- **The Nuts and Bolts of Key Sections**
 - Governance
 - Compensation
 - Related party transactions
- **Strategic and Tactical Insights Related to the Form 990**
- **Distinguishing Features of the Form 990-PF**
- **Common and Potential Pitfalls When Completing the Forms**
- **Overview of Other Key Filings for Tax-Exempts**
 - Unrelated business income—Form 990-T
 - Changing your classification—Form 8940
 - Accepting and disposing of gifted assets—Forms 8283 and 8282
 - Reporting violations—Form 4970
- **State and Local Considerations**
- **“Ask the Experts” Q&A Session**

Faculty

Sharon C. Lincoln, Esq., *Casner & Edwards LLP, Boston, Chair*

Melissa Sampson McMorrow, Esq., *Nutter McClennen & Fish LLP, Boston*

Nicholas Porto, CPA, MSA, *Baker, Newman & Noyes, Portland, ME*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, June 10, 2025

9:30 am–11:00 am

Program # 2250164WBC

REBROADCAST

Wednesday, June 25, 2025

12:00 pm–1:30 pm

Program # 2250164RB1

REBROADCAST

Thursday, July 3, 2025

9:00 am–10:30 am

Program # 2250164RB2

ON DEMAND WEBCAST

View after Thursday, July 3, 2025

Program # 2250164WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Nonprofit Organizations ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1.5 CLE credits



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Learn more at www.mcle.org

Protecting IP Across Your Clients' Range of Contracts

Are IP rights hiding in your clients' contracts? How to identify, assess, negotiate, and counsel your clients on IP rights across their range of contracts

Intellectual property rights are often a company's most valuable assets yet are sometimes overlooked in contracts where IP is not the focus. This can leave companies vulnerable to inadvertent IP loss or liability. Common examples include employment agreements and M&A agreements. And even in contracts where IP is the focus—such as patent assignments and license agreements—small words can make a big difference if a dispute arises in the future.

In this new online seminar, we explain how to identify whether IP rights may be implicated in a variety of contracts, common terms and clauses to understand and negotiate, and traps to watch out for depending on which side you represent. Hear a well-rounded discussion of IP in contracts from various practice perspectives. Although designed for practitioners new to these areas, this program also provides enough depth for those with some experience.

Agenda

- IP Definitions and Default Ownership Rules
- Patent Assignment and License Agreements
- Employee Agreements (Non-competes, Confidentiality and Non-disclosure Agreements, Non-solicits, Cooperation Provisions)
- Enforcement of Restrictive Covenants
- Protection of IP in Joint Development, Collaboration, Manufacturing, and Other Commercial Contracts
- IP Provisions in M&A Agreements, Including Indemnification and Representations and Warranties in an Acquisition
- "Ask the Experts" Q&A Session

Faculty

Andrea B. Reed, Esq., *Lando & Anastasi LLP, Boston*, Chair

Tavish M. Brown, Esq., *Hirsch Roberts Weinstein LLP, Boston*

Michael J. Douglas, Esq., *Gennari Aronson LLP, Needham Heights*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, March 13, 2025

10:00 am–12:00 pm

Program # 2250160WBC

REBROADCAST

Friday, March 28, 2025

12:00 pm–2:00 pm

Program # 2250160RB1

REBROADCAST

Monday, April 7, 2025

2:00 pm–4:00 pm

Program # 2250160RB2

ON DEMAND WEBCAST

View after Monday, April 7, 2025

Program # 2250160WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Intellectual Property Practice ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

27th Annual Personal Injury Law Conference 2025

Spotlight on the major issues that impact your practice

The signature *Conference* for the personal injury law bar brings you up to date on key topics and developments. A *Conference* highlight is “Children v. Goliath: The Effort to Hold Massive Corporations Responsible for Child Pornography on Pornhub” presented by one of the attorneys involved in the effort, Lauren Tabaksblat.

Later in the morning we’ll be looking at how AI can maximize the demand package. Ryan Sindelar from EvenUp Law will be guiding the discussion.

The fast-paced agenda also provides timely caselaw updates, answers to ethics questions, and an opportunity to hear from and ask your questions to our judicial panel! Joseph Berman of the Board of Bar Overseers looks at the ethical issues facing personal injury lawyers and we go through updates and changes in the case law since last year.

This outstanding *Conference* is essential for both new and experienced practitioners to hear from the judiciary, learn from experts, and strengthen their skills. Take advantage of this valuable opportunity to become a more effective personal injury lawyer!

Agenda

- Caselaw Update
- Ask the Judge Judicial Panel
- Ethics in Personal Injury Law
- AI and Maximizing the Benefit of the Demand Package
- Children v. Goliath: The Effort to Hold Massive Corporations Responsible for Child Pornography on Pornhub

Faculty

Andrew C. Meyer, Jr., Esq., *Lubin & Meyer, PC, Boston*, Cochair

Adam R. Satin, Esq., *Lubin & Meyer, PC, Boston*, Cochair

Joseph S. Berman, Esq., *General Counsel, Office of the General Counsel, Massachusetts Board of Bar Overseers, Boston*

Hon. Kristen R. Buxton, *Superior Court, Commonwealth of Massachusetts*

Hon. Michael K. Callan, *Superior Court, Commonwealth of Massachusetts*

Hon. Beverly J. Cannone, *Superior Court, Commonwealth of Massachusetts*

Hon. Patrick M. Haggan, *Superior Court, Commonwealth of Massachusetts*

Ryan Sindelar, Esq., *Director of Legal Solutions, EvenUp Law, San Francisco, CA*

Lauren Tabaksblat, Esq., *Brown Rudnick, New York, NY*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, May 20, 2025

9:30 am–4:30 pm

Program # 2250237WBC

REBROADCAST

Wednesday, June 4, 2025

9:30 am–4:30 pm

Program # 2250237RB1

REBROADCAST

Thursday, June 12, 2025

9:30 am–4:30 pm

Program # 2250237RB2

ON DEMAND WEBCAST

View after Thursday, June 12, 2025

Program # 2250237WBA

Tuition *(includes written materials)*

- \$275
- \$247.50 MCLE Members
- \$137.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Personal Injury Law Sourcebook & Citor ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 6 CLE credits

Including up to 1 ethics credit



Subscribe to the MCLE OnlinePass®

for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

Captivate the Courtroom: Presentation Techniques

Command performance and win the day

Remember Gregory Peck as Atticus Finch in *To Kill a Mockingbird*? Katherine Hepburn in *Adam's Rib*? Tom Cruise in *A Few Good Men*? What their characters all had in common was an uncanny ability to captivate the courtroom.

But in real life, many trials quickly devolve into endless paper blizzards and sidebar conferences—and jurors are often bored to tears by the first recess. What techniques do great trial lawyers use to grab and hold the jury's attention and, ultimately, obtain the desired verdict? Attend this unique online seminar featuring legends of the Boston trial bar to find out. The program also offers a view from the bench featuring the chief judge of the U.S. District Court for the District of Massachusetts, perspectives from a seasoned trial consultant, and expert commentary from one of MCLE's most popular and engaging moderators, Richard Zielinski.

Agenda

- "War Stories" About Effective Advocacy
- Effective Use of Themes to Engage and Persuade the Jury
- Effective Use of Technology
- "Less is More" and "K.I.S.S."
- Demonstrative Aids in the Courtroom
- Effective Cross Examination
- What Jurors Say About Trial Lawyers
- Tips for Effective Openings and Closings

Faculty

Richard M. Zielinski, Esq., *Goulston & Storrs, PC, Boston*, Chair
Randall W. Bodner, Esq., *Ropes & Gray LLP, Boston*
Sarah Chapin Columbia, Esq., *McDermott Will & Emery, Boston*
Phil James, *Trial Solutions, Wappingers Falls, NY*
Michael B. Keating, Esq., *Meehan, Boyle, Black & Bogdanow, PC, Boston*
Hon. F. Dennis Saylor IV, *U.S. District Court, District of Massachusetts, Boston*
Harvey J. Wolkoff, Esq., *Quinn Emanuel Urquhart & Sullivan LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, March 12, 2025
2:00 pm–5:00 pm
Program # 2250242WBC

REBROADCAST

Thursday, March 27, 2025
2:00 pm–5:00 pm
Program # 2250242RB1

REBROADCAST

Friday, April 4, 2025
9:30am–12:30 pm
Program # 2250242RB2

ON DEMAND WEBCAST

View after Friday, April 4, 2025
Program # 2250242WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Courtroom Advocacy ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



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for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

Direct & Cross-Examination Skills Workshop 2025

On-your-feet training to get the most out of every witness

Who are the most important people at a trial? It is the testimony of the witnesses that ultimately determines the outcome. The examination of the witnesses is a key component of a winning strategy. The presentation of testimony is not to be taken lightly. It should be the product of careful planning, thorough preparation, and stylish execution. Anyone can improve their skills through practice and hard work.

In this two-day *Workshop*, expert litigators from various practice areas and judges from different state courts teach everything you need to know about direct and cross-examination. After lectures and a demonstration by the faculty each morning, you spend the rest of the day testing your skills in a mock courtroom setting, where you can try out what you have learned and get essential, immediate feedback on your performance.

Agenda

- Preparing for Direct Examination
- Questions for Direct Examination
- Direct Examination Outline
- Challenges During Direct Examination (And, How to Overcome Them)
- Managing Direct and Preparing for Re-Direct
- On-Your-Feet Direct Examination
- Preparing for Cross-Examination
- The Power of Leading Questions
- Controlling the Witness
- Goal-Oriented Questioning Sequences
- Cross-Examination Sequences
- The Power of Three
- Controlling the Runaway Witness
- On-Your-Feet Cross-Examination

Faculty

Gwen Nolan King, Esq., *Nolan King Law, Weston*, Cochair
Jennifer C. Roman, Esq., *Tracey, Roman & Ramos, PC, Wellesley Hills*, Cochair
Hon. Christine D. Anthony, *Probate and Family Court, Commonwealth of Massachusetts*
Hon. Mary Rudolph Black, *Probate and Family Court, Commonwealth of Massachusetts*
Paula S. Bliss, Esq., *Justice Law Collaborative LLC, North Easton*
Hon. Anthony J. Campo, *Superior Court, Commonwealth of Massachusetts*
Wayne F. Dennison, Esq., *Brown Rudnick LLP, Boston*
Hon. Catherine H. Ham, *Superior Court, Commonwealth of Massachusetts*
Cheryl Boylan Pinarchick, Esq., *Fisher & Phillips LLP, Boston*
Russell X. Pollock, Esq., *Bergstresser & Pollock, PC, Boston*
Grace C. Roessler, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Boston*
Gary O. Todd, Esq., *Todd & Weld LLP, Boston*

Dates & Location

Register at www.mcle.org

BOSTON

Thursday, May 8, &
Friday, May 9, 2024
9:30 am–4:30 pm
MCLE Conference Center
10 Winter Place, via Winter Street
Program # 2250236P01

Tuition *(includes written materials)*

- \$595
- \$535.50 MCLE Members
- \$446.25 New Lawyers admitted to law practice within 5 years and Pending Admittees

This limited-enrollment program is not included in the MCLE OnlinePass.

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Courtroom Advocacy, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for all registrants

Registration notes

Space is limited and is available on a first come, first served basis. Cancellations may only be refunded, minus a \$100 processing fee, if we are able to fill your seat.

CLE Credits

Earn up to 12 CLE credits

Effective Appellate Advocacy

The government on appeal

Litigating an appeal can be challenging, especially for attorneys who don't regularly practice in the appellate courts. From intricate procedural requirements to the heightened standards of review, knowing how to identify potential pitfalls and avoid common errors is crucial to protecting your client's interests. But understanding the "dos and don'ts" and knowing where the traps for the unwary may be lurking is half the battle.

This seminar brings together the clerk of the Supreme Judicial Court, an assistant clerk of the Appeals Court, and an experienced appellate attorney to help you identify those potential problem areas and increase the likelihood that your client will get a favorable result.

Agenda

- What Are the "Traps for the Unwary" For Attorneys Filing Cases in the SJC?
- When Should I File With the Appeals Court Single Justice and When Am I Wasting My Time (and My Client's Money)?
- What is the Difference Between a Conviction Integrity Unit and an Appeals Unit?
- What are the Common Mistakes that Attorneys Make in Conviction Integrity Cases?
- "Ask the Experts" Q&A Session

Faculty

David A.F. Lewis, Esq., *Suffolk District Attorney's Office, Commonwealth of Massachusetts*, Chair
Maura A. Looney, Esq., *Clerk, Supreme Judicial Court, Commonwealth of Massachusetts*
Patricia Campbell Malone, Esq., *Assistant Clerk, Appeals Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, April 3, 2025
10:00 am–12:00 pm
Program # 2250248WBC

REBROADCAST

Friday, April 18, 2025
12:00 pm–2:00 pm
Program # 2250248RB1

REBROADCAST

Monday, April 28, 2025
2:00 pm–4:00 pm
Program # 2250248RB2

ON DEMAND WEBCAST

View after Monday, April 28, 2025
Program # 2250248WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Sponsor Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Appellate Practice in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Learn more at www.mcle.org

Enforcing Judgments

Turn winning judgments into cash

How do you evaluate collections claims? How many judgments do you have in your files? How can you turn those judgments into cash? Collection cases are increasingly common yet alarmingly complex. Regardless of the nature of a claim, from a simple contract action or collection of a promissory note, to the most complex antitrust case, civil actions are primarily designed to obtain financial remuneration. That basic fact is constant—but the circumstances are always changing. You want to collect the money as quickly and efficiently as possible, but debtors are guaranteed a network of legal rights which cannot be overlooked.

This seminar presents practical approaches to maximizing your ability to collect and enforce judgments without overstepping the bounds of law and professional responsibility. The experienced faculty convey how to use technology, procedure, and up-to-the-minute precedent to focus a successful collection campaign. You learn the options that are available and how, when, and why to select one strategy over another. In addition, you receive concrete examples to help guide the case from your first client communication to payment of the final bill.

Agenda

- How to Evaluate the Case and Plan Your Attack
- Effective Prejudgment Security Strategies
- What Information Is Lawfully Available and How to Use It in Negotiation
- What the Courts Expect
- What to Consider in Proceeding Against Individuals; Corporations; Trusts; LLCs; LLPs; and Proprietorships
- Post-Judgment Options
- How to Avoid Ethical Traps When Collecting Debt
- Remote Filings and Hearings
- Domesticating Foreign Judgments
- “Ask the Experts” Q&A Session

Faculty

Dana E. Casher, Esq., *Casher Law Offices, Wilbraham*, Chair

Jonathan H. Allen, Esq., *Allen Law, Springfield*

John O. Postl, Esq., *John Postl, PC, Quincy*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, April 30, 2025

2:00 pm–4:00 pm

Program # 2250243WBC

REBROADCAST

Thursday, May 15, 2025

10:00 am–12:00 pm

Program # 2250243RB1

REBROADCAST

Friday, May 23, 2025

12:00 pm–2:00 pm

Program # 2250243RB2

ON DEMAND WEBCAST

View after Friday, May 23, 2025

Program # 2250243WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Collecting Civil Judgments ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



Subscribe to the MCLE OnlinePass®

for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

Handling Vehicle Accident Cases

A roadmap to the hot topics in motor vehicle torts

Millions of car crashes occur each year, resulting in injuries, disabilities, and loss of life. Cases arising from motor vehicle accidents are highly complex, and representing an injured client or defending an alleged tortfeasor can be much more involved than it might seem.

It is vitally important for attorneys to understand both the typical and unusual issues that arise in car crash cases. The diverse panel guides you through the intricacies of motor vehicle torts, from understanding the basic auto insurance policy to valuing your client's case to preparing for trial. You leave with a deep understanding of not only the essentials but also of finely-tuned nuances—and enjoy the focused attention of experts so you can get your questions answered.

Agenda

- Initial Considerations in a Motor Vehicle Case: Taking It; Client Interview; Gathering Facts
- Coverages in the “Standard” Auto Insurance Policy: BI; PIP; Med Pay; UM; UIM
- Special Cases: MBTA; G.L. c. 258 Entities; Public Duty Rule
- G.L. c. 176D & 93A Considerations
- The Defense Perspective
- Hot Topics/Settlement Evaluation/Panel Discussion
- “Ask the Experts” Q&A Session

Faculty

Allison K. Gurley, Esq., *Harding Gurley LLP, Wellesley, Chair*

Mark A. Cashman, Esq., *The Cashman Law Firm, Boston*

Melissa Curran, Esq., *Harding Gurley LLP, Dedham*

Scott A. Spencer, Esq., *MassDOT/MBTA Office of the General Counsel, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, March 27, 2025

12:00 pm–4:00 pm

Program # 2250240WBC

REBROADCAST

Friday, April 11, 2025

10:00 am–2:00 pm

Program # 2250240RB1

REBROADCAST

Monday, April 21, 2025

12:00 pm–2:00 pm

Program # 2250240RB2

ON DEMAND WEBCAST

View after Monday, April 21, 2025

Program # 2250240WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Motor Vehicle Torts: Liability and Litigation ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 4 CLE credits



Subscribe to the MCLE OnlinePass®

for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

How People are Admitted, Committed, Medicated & their Rights to Appeal

An overview of G.L. c. 123 with roundtable discussion

The program presents an overview of G.L. c. 123, the Mental Health statute, to provide a basic understanding of the law and the proceedings governed while engaging in an integrated conversation about how respondents defend against commitment and forced treatment. The panelists explore the legal and medical issues triggered by the potential deprivation of liberty, autonomy, and bodily integrity.

The program emphasizes practical strategies for defending respondents in these high-stakes cases, including how to effectively collaborate with expert witnesses. Participants explore the intersection of legal and medical considerations and develop skills to navigate the procedural and substantive challenges that arise. The program provides participants with valuable tools to advocate effectively for clients while addressing the legal implications involved in these proceedings.

Agenda

- How People Can Enter the Mental Health System and Become Involuntarily Hospitalized and Medicated
- Distinctions Between Commitment and Forced Treatment Proceedings and the Appellate Rights Which Apply
- Ways Experts Can Assist in the Defense of Respondents and Develop Strategies
- Legal, Medical, and Practical Considerations that Arise in These Proceedings

Faculty

Beau Kealy, Esq., *Committee for Public Counsel Services, Boston*, Chair

Dr. Tina Adams, Ph.D, L.P., *Owner, Independent Medical Expert, Restore Psychological Services, PLLC, Boston*

Michael C. Boyne, Esq., *Private Counsel Panel Member, Committee for Public Counsel Services, Mental Health Litigation Unit, Springfield*

Hon. Lisa A. Grant, *Boston Municipal Court, Commonwealth of Massachusetts*

Dr. Leonard S. Lai, M.D., *Independent Medical Expert, Jamaica Plain*

Earl Miller, *Certified Peer Specialist, Wildflower Alliance, Holyoke*

Karen Owen Talley, Esq., *Committee for Public Counsel Services, Mental Health Division, Brockton*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, July 30, 2025

2:00 pm–4:00 pm

Program # 2250254WBC

REBROADCAST

Thursday, August 14, 2025

2:00 pm–4:00 pm

Program # 2250254RB1

REBROADCAST

Friday, August 22, 2025

12:00 pm–12:00 pm

Program # 2250254RB2

ON DEMAND WEBCAST

View after Friday, August 22, 2025

Program # 2250254WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



Subscribe to the MCLE OnlinePass®

for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

How to Draft Civil Jury Instructions When a Model Does Not Exist

Translate complex legal issues to plain English

Shouldn't the last thing a jury hears before they deliberate be compelling, accurate, and easily understood? That is the goal of model jury instructions, but what do you do when a model does not exist? This program equips you with the tips and tools you need to craft instructions tailored to your particular case. Whether you need instructions for a novel issue or to fit unique facts, you learn techniques and tactics to get the winning language before the jury.

What are the requirements for civil jury instructions? How and when do you properly present your instructions to the judge? How do you translate complex legal issues to plain English? These issues and many more are discussed in this 90-minute program that will be helpful to all trial attorneys.

Don't risk losing the case you've been living with for years on improper or misunderstood instructions. This program is necessary to get ready for your next trial!

Agenda

- Research and Drafting
- Presentation to the Judge
- Sample Jury Instructions
- Helpful Free Online Sources
- "Ask the Expert" Q&A Session

Faculty

Vincent N. DePalo, Esq., *Smith Duggan Cornell Gollub, LLP, Boston*, Chair
Emily A. Burke-Rodriguez, Esq., *Smith Duggan Cornell Gollub, LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, May 12, 2025
3:30 pm–5:00 pm
Program # 2250247WBC

REBROADCAST

Tuesday, May 27, 2025
12:00 pm–1:30 pm
Program # 2250247RB1

REBROADCAST

Wednesday, June 4, 2025
10:00 am–11:30 pm
Program # 2250247RB2

ON DEMAND WEBCAST

View after Wednesday, June 4, 2025
Program # 2250247WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Superior Court Civil Practice Jury Instructions ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1.5 CLE credits



Subscribe to the MCLE OnlinePass[®]
for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

Introducing & Excluding Evidence at Trial

The mechanics of offering or opposing the introduction of evidence

Every attorney who has tried a case has been faced with the question of how a certain, crucial piece of evidence can either be admitted or kept out from the trial. Perhaps it is a document originally written in Japanese with a translation, a photograph of an accident scene taken by a now-deceased photographer, a newspaper article, a police report, or blood test results. Similarly, attorneys are frequently faced with difficult witnesses that either require a great deal of preparation to put on the stand, or to elicit certain points during cross-examination.

This seminar provides both new and experienced practitioners with real-life examples and suggestions to demystify the trial courts, the handling of witnesses, and the effective use of evidence at trial. Taught by a panel of practitioners experienced in civil litigation, this seminar provides insight into how evidence can be used effectively at trial. In addition, the faculty discuss their experience in what works and, perhaps most importantly, what doesn't work! The seminar touches on the latest issues in the introduction of real and demonstrative evidence in both the criminal and civil contexts as well as the latest in electronic discovery.

Agenda

- Pre-Trial Considerations, Motions in Limine, and How to Get to the Courthouse in One Piece
- Direct Examination of Lay Witnesses and Expert Witnesses
- Cross-Examination of Lay Witnesses and Expert Witnesses
- Document Organization and Assembly of Records
- Real and Demonstrative Evidence
- Use of Experts at Trial
- Electronic Discovery and Unusual Legal Issues
- "Ask the Experts" Q&A Session

Faculty

Donald L. Pitman, III, Esq., *The Pitman Law Offices LLC, Newburyport, Chair*
Martha R. Bagley, Esq., *Brigantine, PC, Topsfield*
Kathy Jo Cook, Esq., *Sheff & Cook LLC, Boston*
Martin F. Kane II, Esq., *McGrath & Kane, Boston*

Dates & Locations

Register at www.mcle.org

BOSTON

Thursday, June 12, 2025
1:00 pm–5:00 pm
MCLE Conference Center
10 Winter Place, via Winter Street
Program # 2250239P01

LIVE WEBCAST

Thursday, June 12, 2025
1:00 pm–5:00 pm
Program # 2250239WBC

REBROADCAST

Friday, June 27, 2025
9:30 am–1:30 pm
Program # 2250239RB1

REBROADCAST

Monday, July 7, 2025
12:00 pm–4:00 pm
Program # 2250239RB2

ON DEMAND WEBCAST

View after Monday, July 7, 2025
Program # 2250239WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

A Practical Guide to Introducing Evidence in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for in-person registrants
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 4 CLE credits



Subscribe to the MCLE OnlinePass®
for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

Judge Paul A. Chernoff Trial Advocacy Workshop 2025

Initiation rite for rising and determined trial lawyers

Newly named in honor of long-time chair Judge Paul A. Chernoff after his recent passing in 2024, this five intense days of personalized, comprehensive training provide you with fundamental courtroom skills from several venerable judges and experienced practitioners. This intense, rigorous, and challenging *Workshop*—as many of the state's best trial lawyers attest—is vital for eager trial attorneys entering practice and for those who want to brush up on their trial skills.

Spend the week “on your feet,” arguing, questioning, and developing your skills in a mock trial setting. From opening statements to closing arguments, direct and cross examinations, expert witnesses, and eyewitnesses, improve your trial techniques under the close scrutiny of trial judges and leading attorneys. Most of your trial performance is videorecorded, so you can watch yourself in action throughout the day and receive constructive feedback from multiple faculty members, including judges. The tips, videos, demonstrations, lectures, and group discussions throughout the *Workshop* culminate with a full jury trial on the final day. After your performance, you watch a live jury deliberation via closed-circuit TV before the verdict is delivered. This *Workshop* is your chance to hear what the mock jury thought of your skills, arguments, and courtroom demeanor. Supportive critique continues even after the trial as the presiding judge gives you unique, personalized feedback on your efficacy. You emerge with well-honed trial skills and the ability to face your first—or next—jury trial with confidence.

This *Workshop* features distinguished trial court judges, expert litigators, and experienced lawyers who share their deep knowledge of trial practice, along with their practical and encouraging critique, as your personal mentors throughout the week. Networking opportunities continue at the closing reception, with both students and faculty attending. You leave this *Workshop* with a sense of accomplishment along with greater confidence in your new-found trial practice skills.

Faculty

Hon. Beverly J. Cannone, *Superior Court, Commonwealth of Massachusetts*, Cochair; Hon. Jeffrey A. Locke, *Superior Court, Commonwealth of Massachusetts (Ret.)*, Cochair; Connor M. Barusch, Esq., *Committee for Public Counsel Services, Boston*; Jeffrey N. Catalano, Esq., *Keches Law Group, PC, Bridgewater*; Gregory P. Connor, Esq., *Norfolk District Attorney's Office, Commonwealth of Massachusetts*; Joanne M. Daley, Esq., *Assistant Federal Public Defender, Federal Public Defender Office, Providence, RI*; Noel B. Dumas, Esq., *Adler, Cohen, Harvey, Wakeman & Guekguezian LLP, Boston*; John P. Graceffa, Esq., *Morrison Mahoney LLP, Boston*; A. Bernard Guekguezian, Esq., *Adler, Cohen, Harvey, Wakeman & Guekguezian LLP, Boston*; Hon. Catherine H. Ham, *Superior Court, Commonwealth of Massachusetts*; Robert M. Higgins, Esq., *Lubin & Meyer, PC, Boston*; Shannon L. Johnson, MSN, NP-C, *Salem*; Leonard H. Kesten, Esq., *Brody, Hardoon, Perkins & Kesten LLP, Boston*; Christine A. Knipper, Esq., *Wilson Elser Moskowitz Edelman & Dicker, LLP, Boston*; Mark Tan Lee, Esq., *Suffolk District Attorney's Office, Commonwealth of Massachusetts*; Nigel W. Long, Esq., *Compliance Officer, Liberty Mutual Insurance Group, Boston*; Andrew H. Lynch, Esq., *Lynch & Lynch, PC, South Easton*; Christine M. Martin, Esq., *Tetzel Law LLC, Boston*; Andrew C. Meyer, Jr., Esq., *Lubin & Meyer, PC, Boston*; Jennifer L. Mikels, Esq., *Goulston & Storrs, PC, Boston*; Evan C. Ouellette, Esq., *Northeastern University, Office of University Counsel, Boston*; Hon. Erika P. Reis, *Boston Municipal Court Department, Commonwealth of Massachusetts*; Hon. Asha White, *First Justice, Woburn District Court, Commonwealth of Massachusetts*; Anne S. Yas, Esq., *Norfolk District Attorney's Office, Commonwealth of Massachusetts*; Ellen J. Zucker, Esq., *Zucker Law Group, Boston*

Dates & Location

Register at www.mcle.org

BOSTON

Monday, July 14, 2025
through Friday, July 18, 2025
8:30 am–5:30 pm
MCLE Conference Center
10 Winter Place, via Winter Street
Program # 2250235P01

Tuition *(includes written materials)*

- \$1,495
- \$1,345.50 MCLE Members
- \$1,121.25 New Lawyers admitted to law practice within 5 years and Pending Admittees

This limited-enrollment program is not included in the MCLE OnlinePass.

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

All registrants receive a full set of problems and case materials published by T. Mauet, et al., as well as a copy of MCLE's *Massachusetts Courtroom Advocacy*, which can be downloaded via the link emailed to you upon registration. Attendees also receive a print copy.

Registration notes

Space is limited and available on a first come, first served basis. Registration by July 7 is highly encouraged. Persons who register by that date will be mailed the special *Workshop* materials. If you wish to register after July 7, please first contact MCLE Customer Service at 617-482-2205.

Cancellations are subject to a \$100 processing fee.

You're encouraged to bring one or two volunteer jurors with you to MCLE on the final day of the *Workshop*—it's a fun learning experience for them as well! Jurors need not be lawyers or law students and no advance preparation is necessary.

CLE Credits

Earn up to 40 CLE credits

Judge Young on Using the Rules of Evidence to Persuade

A unique opportunity to learn from one of the bench's most inspirational lecturers

Join Judge William G. Young of the U.S. District Court for this popular series on evidence and trial practice, which takes you through the essentials of discovery, motion practice, and trial.

Evidence and Discovery

- Theory and types of relevance; Burdens, standards, and methods of proof; Prima facie case; Burdens of production and persuasion; Habit and routine; Relevant but inadmissible; Guilty pleas; Collateral source; Rape shield provisions
- Trial preparation; Interrogatory and deposition practice; Requests for entry on land and admission; Litigation support services; Preparation of demonstrative aids; Timeline; "Waves" of discovery; Multi-district practice; Preparation of the trial book
- Experts; Law of expert testimony; GHOSTO rule; Qualifying the expert; Eliciting and explaining the expert opinion; Cross-examination of experts

Evidence and Motion Practice

- Motion practice; Forum shopping; District of Massachusetts Cost and Delay Reduction Plan; Utilizing motions; Class certification; Advocacy of motions
- Privileges and confidential data; Variety and manners of privileges
- Presumptions and judicial notice; Conclusive relationships based on social policy; Rule of deference to legislative fact-finding

Evidence at Trial

- Trial procedures; Jury empanelment; Taking objections and making the record; Motions for directed verdicts; Requests for jury instructions; Requests for findings and rulings; Time limits; Roles of the courtroom deputy clerk and court reporter
- Direct and cross-examination techniques and structure; The five W's; Leading questions; Order of witnesses; The adverse witness; Scope of interrogation
- Impeachment; Grounds for impeachment and techniques; Prior inconsistent statements and convictions; The three Cs; Impeachment through evidence
- Theory of rule against hearsay; The M theory; Four major groups of exceptions; Hearsay within hearsay; Rebutting hearsay testimony; Confrontation Clause; Prior statements of witnesses; "Reliable" and "necessary" exceptions
- Evidentiary foundations; ARBPHU rule; Submission and use of tangible evidence; Arguments at trial; Opening statement; Closing argument

Instructor

WILLIAM G. YOUNG, District Judge of the U.S. District Court for the District of Massachusetts, has been an active trial judge, serving on both the Massachusetts Superior Court and the U.S. District Court. A longtime teacher of evidence and trial advocacy, he is a member of the faculty of Boston College and Boston University Law Schools and has frequently served as a trial advocacy team leader at Harvard Law School and in MCLE's summer Trial Advocacy Workshop. He is the author of numerous MCLE publications, including the highly acclaimed *Reflections of a Trial Judge*. An electrifying lecturer, Judge Young has specifically crafted this program to distill the very best of his fifty years of teaching.

Judge Young was recently honored by MCLE for his career-long contributions with a 2024 MCLE Scholar-Mentor award.

Dates & Location

Register at www.mcle.org

WEEKLY MEETINGS

Thursdays, March 27, April 3,
& April 10, 2025
4:00 pm–6:00 pm

John Joseph Moakley U.S. Courthouse,
Judge Young's Chambers
Courtroom 18—5th Floor,
1 Courthouse Way, Boston

Program # 2250293P01

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, and Law Students

OnlinePass subscribers: Use your annual *Plus 1* benefit to attend this program for free, contact Customer Service to register.

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Evidence: A Courtroom Reference, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for all registrants

CLE Credits

Earn up to 6 CLE credits

Litigators' Guide to Experts in Civil Cases

Effectively engaging experts

Learn the essential skills and strategies for effectively utilizing expert witnesses in civil cases. Participants learn how to select the right expert, craft compelling expert reports, and prepare for successful expert testimony. Emphasis is placed on understanding the nuances of the *Daubert*/Rule 702 standards, ensuring that attorneys are well-versed in the legal thresholds for expert admissibility.

Additionally, the program covers practical aspects of expert engagement, including effective communication techniques, managing expert costs, protecting work product and privileged information, and navigating challenges posed by opposing counsel. By the end of the program, you will be equipped with a comprehensive toolkit to effectively integrate expert testimony into your civil litigation practice.

Agenda

- Expert Selection and Admissibility
- Effective Expert Communication
- Using Experts as Consultants
- Best Practices
- “Ask the Experts” Q&A Session

Faculty

J. Nathan Cole, Esq., *Kenney & Sams, PLLC, Boston*, Chair
Kathleen A. Federico, Esq., *Morrison Mahoney LLP, Boston*
Matthew J. Fogelman, Esq., *Fogelman Law, Newton*
Timothy L. Morse, Ph.D., P.E., CFEI, *Exponent, Natick*
Emyr T. Remy, Esq., *Shook Hardy & Bacon, Boston*
Matthew C. Welnicki, Esq., *Kenney & Sams, PLLC, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, April 1, 2025
9:30 am–12:30 pm
Program # 2250253WBC

REBROADCAST

Wednesday, April 16, 2025
2:00 pm–5:00 pm
Program # 2250253RB1

REBROADCAST

Thursday, April 24, 2025
2:00 pm–5:00 pm
Program # 2250253RB2

ON DEMAND WEBCAST

View after Thursday, April 24, 2025
Program # 2250253WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Expert Witnesses ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



Subscribe to the MCLE OnlinePass®
for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

Making Objections Workshop 2025

On-your-feet training on when to object—and when to stay silent

Knowing when to make objections, and how to support and oppose them, is a vital courtroom skill. Equally important is knowing when to keep silent. In this workshop, expert litigators teach you not only how to understand the proper grounds for making objections—and how to effectively argue and oppose them—but also how to decide when it is in your best interests to do so. This workshop is offered exclusively in-person in Boston so you can take advantage of the exclusive opportunity to test your knowledge in a mock courtroom setting, where you can try out the skills you have learned and get essential feedback on your performance.

Agenda

- Hearsay Objections
- Foundation Objections
- Business Records Issues
- When to Use Motions *in Limine*
- When and How to Challenge the Competency of a Witness
- What an Expert May Rely Upon When Giving an Opinion
- When to Ask the Court to Take Judicial Notice
- When and How to Object to Improper Arguments to a Jury
- “Ask the Experts” Q&A Session

Faculty

Michael P. Sams, Esq., *Kenney & Sams, PC, Boston*, Chair

Peter E. Ball, Esq., *Fitch Law Partners LLP, Boston*

Hon. Rosemary Connolly, *Superior Court, Commonwealth of Massachusetts*

Jack W. Pirozzolo, Esq., *Sidley Austin LLP, Boston*

Date & Location

Register at www.mcle.org

BOSTON

Wednesday, April 9, 2024

12:00 pm–5:00 pm

MCLE Conference Center

10 Winter Place, via Winter Street

Program # 2250238P01

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals

OnlinePass subscribers: Use your annual *Plus 1* benefit to attend this workshop for free, contact Customer Service to register.

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

A Practical Guide to Introducing Evidence in Massachusetts, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for all registrants

CLE Credits

Earn up to 5 CLE credits



Subscribe to the MCLE OnlinePass®

for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

Medical Records: Everything Lawyers & Paralegals Need to Know

Collection, review, and analysis

Medical records are necessary for the analysis and pursuit of many types of claims, including personal injury, workers' compensation, and disability. Paralegals and attorneys require knowledge of how to request, collect, and interpret medical records and associated materials, such as radiology images, medical bills, and the like, as well as the skills to ensure these materials are prepared in a condition suitable for admission in evidence.

Our legal experts discuss the methods necessary to collect and prepare medical records and associated materials for admission, while our medical expert provides insight into how to review and analyze medical records and when to recruit medical experts as part of the process.

Agenda

- Requesting and Collecting Medical Records
- Medical Records and Litigation
- Key Features of Medical Records and Why They Matter

Faculty

Maria Laura Mazur, Esq., *Lubin & Meyer, PC, Boston*,

Mary Wenham, *Medical Paralegal, Lubin & Meyer, PC, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, May 6, 2025

2:00 pm–4:00 pm

Program # 2250249WBC

REBROADCAST

Wednesday, May 21, 2025

12:00 pm–2:00 pm

Program # 2250249RB1

REBROADCAST

Thursday, May 29, 2024

10:00 am–12:00 pm

Program # 2250249RB2

ON DEMAND WEBCAST

View after Thursday, May 29, 2025

Program # 2250249WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
 - Transcript & videorecording emailed 2 weeks post-program
-

CLE Credits

Earn up to 2 CLE credits



Subscribe to the MCLE OnlinePass®

for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

Motion Practice in Superior & District Court

Types of pre-trial motions and what to expect when moving or opposing them

Any civil case filed in a Massachusetts Superior or District Court almost certainly requires some form of motion practice, whether seeking injunctive relief, to obtain discovery, to obtain a dispositive decision, or to limit evidence at trial. The motions themselves, the strategic decisions regarding when and whether to file them, and the court rules governing them can be some of the most complex and confusing areas of civil practice—and also can be the most interesting.

Join our expert litigators as we look at the different types of pre-trial motions and what to expect when moving or opposing them.

Agenda

- Know the Rules
- Motions for Injunctive Relief
- Discovery Motions
- Dispositive Motions
- Motions in Limine
- “Ask the Experts” Q&A Session

Faculty

Alexis P. Theriault, Esq., *Conn Kavanaugh Rosenthal Peisch & Ford LLP, Boston*, Chair

Gregory M. Boucher, Esq., *Saul Ewing LLP, Boston*

Lesley P. Chuang, Esq., *DLA Piper, Boston*

Tristan P. Colangelo, Esq., *Kerstein, Coren & Lichtenstein, Wellesley*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, July 9, 2025

3:00 pm–5:00 pm

Program # 2250244WBC

REBROADCAST

Thursday, July 24, 2025

12:00 pm–2:00 pm

Program # 2250244RB1

REBROADCAST

Friday, August 1, 2025

10:00 am–12:00 pm

Program # 2250244RB2

ON DEMAND WEBCAST

View after Friday, August 1, 2025

Program # 2250244WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Superior Court Civil Practice Manual ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Learn more at www.mcle.org

Practical Uses for AI in Trial Preparation & Legal Practice

Learn how and when to use ChatGPT and other modern generative-AI powered tools to boost your productivity and improve your legal work

This new program teaches lawyers how to use AI in their practice. The program covers a variety of topics, including AI in document automation, using AI in a small firm, and different AI tools available on the market. We close with your questions and answers from the expert panel.

This program is designed for lawyers who want to learn how to use AI to improve their productivity and legal work. It provides lawyers with the knowledge and skills necessary to use AI effectively in their practice.

Agenda

- 5 Minute Primer: What is Generative AI?
- What are Safe and Unsafe Uses?
- Product Landscape With a Focus on Legal Specific AI Tools
- AI in Document Automation
- AI and CLM Tools
- Using AI in a Small Firm
- Hands On Demos
- “Ask the Experts” Q&A Session

Faculty

Quinten Steenhuis, Esq., *Adjunct Professor, Legal Innovation and Technology Lab, Suffolk University Law School, Boston, Chair*

Colin S. Levy, Esq., *Director of Legal, Malbek, Princeton, NJ*

Nicholas Matlach, Esq., *ioLiberum Law Firm, P.C., Providence, RI*

Kara Peterson, *Co-Founder, descrybe.ai, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, June 10, 2025

3:00 pm–5:00 pm

Program # 2250245WBC

REBROADCAST

Wednesday, June 25, 2025

10:00 am–12:00 pm

Program # 2250245RB1

REBROADCAST

Thursday, July 2, 2025

12:00 pm–2:00 pm

Program # 2250245RB2

ON DEMAND WEBCAST

View after Thursday, July 2, 2025

Program # 2250245WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Statements to Remember: Opening & Closing Arguments

Inspired by our friend, the late Judge Paul A. Chernoff

All proceeds from this program will go to the
Hon. Paul A. Chernoff Scholarship Fund.

Judge Paul A. Chernoff valued his role as a teacher. Every year he would spend a week teaching new lawyers the skills they would need in the courtroom during MCLE's *Trial Advocacy Workshop*. In his memory, we have put together a program that focuses on a part of that training: the opening and closing arguments.

Leaders in the field will demonstrate opening and closing arguments in a civil and criminal case, while our panel of experts critique their arguments and offer suggestions for everyone watching to improve their opening statements and closing arguments.

In-person attendees are invited to join us for a post-program to speak to our presenters and critiquers one-on-one and remember our friend, Judge Paul Chernoff.

Agenda

- Opening Statement (Civil Plaintiff)
- Opening Statement (Civil Defendant)
- Critique of the Statements
- Closing Statement (Criminal Defense)
- Closing Statement (Criminal Prosecution)
- Critique of the Statements
- Reception for In-Person Attendees (starts at 4:00 pm)

Faculty

Hon. John C. Cratsley, *Superior Court, Commonwealth of Massachusetts (Ret.), JAMS, Concord,*
Chair

Hon. Beverly J. Cannone, *Superior Court, Commonwealth of Massachusetts*

Joanne M. Daley, Esq., *Assistant Federal Public Defender, Federal Public Defender Office,*
Providence, RI

Sandra Gant, Esq., *Research & Writing Attorney, Federal Public Defender Office, Boston*

Michael Glennon, Esq., *Brody, Hardoon, Perkins & Kesten, Boston*

Leonard H. Kesten, Esq., *Brody, Hardoon, Perkins & Kesten LLP, Boston*

Mark Tan Lee, Esq., *Suffolk District Attorney's Office, Commonwealth of Massachusetts*

Jay Lynch, III, Esq., *Lynch & Lynch, PC, South Easton*

Dates & Locations

Register at www.mcle.org

BOSTON

Wednesday, March 26, 2025

2:00 pm–4:00 pm

MCLE Conference Center

10 Winter Place, via Winter Street

Program # 2250386P01

LIVE WEBCAST

Wednesday, March 26, 2025

2:00 pm–4:00 pm

Program # 2250386WBC

REBROADCAST

Thursday, April 10, 2025

12:00 pm–2:00 pm

Program # 2250386RB1

REBROADCAST

Friday, April 18, 2025

10:00 am–12:00 pm

Program # 2250386RB2

ON DEMAND WEBCAST

View after Friday, April 18, 2025

Program # 2250386WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers (attend in-person with your *Plus 1* benefit; contact Customer Service to register)

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Learn more at www.mcle.org

State-Sponsored Arbitration: Understanding the Home Improvement Contractor Law & Lemon Law

Understand the arbitration process between homeowners and registered home improvement contractors, and car purchasers and dealerships/manufacturers under the Massachusetts Lemon Law

The Home Improvement Contractor (HIC) law was created in 1992 to protect consumers and regulate the business practices of contractors. It established a registration requirement, an arbitration program for resolving disputes, and a guaranty fund program to compensate consumers up to \$10,000 for unpaid judgments against contractors.

Under the Massachusetts Lemon Law, consumers may receive compensation for a new or used vehicle if it was bought in Massachusetts from a licensed dealer and the vehicle has at least one defect that substantially impairs its use, market value, or safety.

Learn what every lawyer and consumer should know about these important avenues of recourse and resolution.

Agenda

- **Home Improvement Contractor Arbitration**
 - What is it?
 - Who qualifies?
 - Steps to successfully file for arbitration
 - Tips for handling these types of cases
- **Lemon Law Arbitration**
 - What is it?
 - Who qualifies?
 - Steps to successfully file for arbitration
 - Tips for handling these types of cases
- **“Ask the Expert” Q&A Session**

Faculty

Clinton Dick, Esq., *General Counsel, Office of Consumer Affairs and Business Regulation, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, March 18, 2025
9:30 am–10:30 am
Program # 2250161WBC

REBROADCAST

Wednesday, April 2, 2025
12:00 pm–1:00 pm
Program # 2250161RB1

REBROADCAST

Thursday, April 10, 2025
3:00 pm–4:00 pm
Program # 2250161RB2

ON DEMAND WEBCAST

View after Thursday, April 10, 2025
Program # 2250161WBA

Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Members
- \$72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Survey of Technology Usage in the Courts: What Can & Cannot Be Done

Navigating the Superior Court in the digital age

In the post-pandemic world, business practices of the past have yielded to new modes of delivering essential services. The Massachusetts Superior Court is no exception. These changes have led to many advantages as well as some pitfalls. What are the benefits of electronic filing as opposed to filing with paper? Will I appear before the court in person or virtually? What is the most effective way of communicating with the court? Join our panel as we provide you with understanding and insight as to what has changed (and what hasn't) in the digital age and what you can do to successfully steer your case from start to finish.

Agenda

- Understanding and Navigating the Superior Court E-Filing System
- Best Practices: Should I E-File or Should I Appear in Court?
- Will My Hearing Be Held In-Person or Virtually?
- Electronic Notices and Phasing Out Paper
- Effective Communication with the Court
- "Ask the Experts" Q&A Session

Faculty

John E. Powers III, Esq., *Suffolk Superior Court, Commonwealth of Massachusetts*, Chair

Patrick W. Creedon, Esq., *First Assistant Clerk Magistrate, Plymouth Superior Court, Commonwealth of Massachusetts*

Matthew Day, Esq., *Second Assistant Clerk Magistrate, Middlesex Superior Court, Commonwealth of Massachusetts*

Mary K. Hickey, Esq., *First Assistant Clerk Magistrate, Norfolk Superior Court, Commonwealth of Massachusetts*

Anne T. Mitchell, Esq., *Assistant Clerk Magistrate, Essex Superior Court, Commonwealth of Massachusetts*

Michael A. Sullivan, Esq., *Clerk Magistrate, Middlesex Superior Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, March 4, 2025

2:00 pm–4:00 pm

Program # 2250117WBC

REBROADCAST

Wednesday, March 19, 2025

10:00 am–12:00 pm

Program # 2250117RB1

REBROADCAST

Thursday, March 27, 2025

12:00 pm–2:00 pm

Program # 2250117RB2

ON DEMAND WEBCAST

View after Thursday, March 27, 2025

Program # 2250117WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Learn more at www.mcle.org

Trying Civil Cases

A behind-the-scenes immersive experience

Successful trial lawyers always tell novice attorneys that an excellent way to become a better trial lawyer is to sit in court and observe veteran trial lawyers in action. But have you ever sat in court and wondered why an attorney was pursuing a particular line of questioning? Have you ever wished that a seasoned litigator was sitting by your side and explaining trial strategy to you? If you have ever wanted to hear a trial critiqued by the experts, don't miss this unique opportunity to spend a "day in court" with veteran trial attorneys and a sitting Superior Court judge.

Trying Civil Cases presents a one-day trial from start to finish. Each step of the trial is preceded by a brief narrative highlighting what is expected during that particular trial phase. After each segment, the faculty critique the attorneys' performances. Instead of listening to lecturers present the dos and don'ts of trial advocacy, you actually have the opportunity to learn by observing the experts and benefitting from the practical trial commentary provided by the panel of litigators and judge. Bring your questions to personalize your learning experience!

Agenda

- **Opening Statements:** Lecture; Demonstration of plaintiff's opening statement; Demonstration of defendant's opening statement; Analysis and critique
- **Direct and Cross-Examination:** Lecture; Demonstration of direct and cross-examination of plaintiff; Analysis and critique; Demonstration of direct and cross-examination of defendant's expert; Analysis and critique
- **Closing Arguments:** Lecture; Demonstration of defendant's closing argument; Demonstration of plaintiff's closing argument; Analysis and critique
- **"Ask the Experts" Q&A Session**

Faculty

Hon. Paul D. Wilson, *Superior Court, Commonwealth of Massachusetts*, Chair

Peter J. Ainsworth, Esq., *Meehan, Boyle, Black & Bogdanow, PC, Boston*

Warren F. Fitzgerald, Esq., *Fitzgerald Dispute Resolution LLC, Boston*

Marsha V. Kazarosian, Esq., *Kazarosian Costello LLP, Haverhill*

Bridget A. Lopez, Esq., *Morrison Mahoney LLP, Boston*

Dates & Locations

Register at www.mcle.org

BOSTON

Wednesday, May 21, 2025

9:30 am–4:30 pm

MCLE Conference Center

10 Winter Place, via Winter Street

Program # 2250246P01

LIVE WEBCAST

Wednesday, May 21, 2025

9:30 am–4:30 pm

Program # 2250246WBC

REBROADCAST

Thursday, June 5, 2025

9:30 am–4:30 pm

Program # 2250246RB1

REBROADCAST

Friday, June 13, 2025

9:30 am–4:30 pm

Program # 2250246RB2

ON DEMAND WEBCAST

View after Friday, June 13, 2025

Program # 2250246WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Courtroom Advocacy ebook, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for in-person registrants
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 6 CLE credits



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When to Use & How to Master Zoom Depositions

Depositions from your desk

In today's digital world, virtual platforms like Zoom have become a pivotal tool for conducting legal proceedings remotely. As the legal industry continues to embrace technology, virtual platforms have become indispensable, allowing legal professionals to manage cases efficiently without the need for physical presence. Virtual depositions have revolutionized the way attorneys, witnesses, and experts collaborate, allowing for greater flexibility, cost savings, and time management.

This seminar is designed for attorneys who want to confidently take and defend remote depositions. In addition to theoretical insights, the program provides hands-on guidance on the technical aspects of Zoom depositions, including setting up the platform, managing multiple participants, screen-sharing, and recording. Attorneys receive tips on controlling the flow of testimony, managing distractions, and keeping the deposition organized in the virtual environment. The program also offers strategies for using Zoom's features, such as breakout rooms and virtual exhibits, to enhance depositions and ensure a smooth process.

This seminar also covers when Zoom depositions are most appropriate, balancing the advantages of remote proceedings—such as convenience and cost savings—against potential challenges, like technical difficulties or witness credibility concerns. Participants learn about the best practices for preparing witnesses, managing exhibits, and maintaining courtroom decorum in a virtual setting. They also explore ethical considerations and how to address any issues that arise during a Zoom deposition.

Upon completion, participants will not only understand how to navigate the Zoom platform with confidence but will also be equipped to handle any unique challenges that come with conducting depositions remotely.

Agenda

- Zooming In: When Remote Depositions Make Sense
- Comprehensive Zoom Training: Mastering the Zoom Platform
- What Your Stenographer Wants You to Know
- Prep Like a Pro: Managing Witnesses, Exhibits, and More
- Understanding Legal and Ethical Considerations
- Effective Communication Strategies for Virtual Environments

Faculty

Christine M. Martin, Esq., *Tetzel Law LLC, Boston*, Chair

Deb Curran, *Magna Legal Services, Boston*

Scott A. Spencer, Esq., *MassDOT/MBTA Office of the General Counsel, Boston*



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Learn more at www.mcle.org

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, August 5, 2025

10:00 am–12:00 pm

Program # 2250250WBC

REBROADCAST CC

Wednesday, August 20, 2025

12:00 pm–2:00 pm

Program # 2250250RB1

REBROADCAST CC

Thursday, August 28, 2025

2:00 pm–4:00 pm

Program # 2250250RB2

ON DEMAND WEBCAST CC

View after Thursday, August 28, 2025

Program # 2250250WBA

Tuition (includes written materials)

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Deposition Practice Manual ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits

IN PERSON & ONLINE CONFERENCE

25th Annual Criminal Law Conference 2025

Updates, practical takeaways, and tangible instruction from practitioners, judges, and experts

MCLE is pleased to present the *25th Annual Criminal Law Conference 2025!*

Top legal minds from across the state come together at this year's *Conference* to speak on current and emerging criminal law practice issues and hot topics. Don't miss the keynote address by Dr. Galina Davidoff, a nationally-recognized jury consultant.

Our daylong conference kicks off with the always popular caselaw update that will both educate you on the changes in the law and provide practical applications for use in court. In the panels that follow, experts present topics ranging from challenging the common tactic of using motor vehicle stops as a pretext to investigate other crimes to using body worn camera footage to your advantage. Other panels tackle advanced topics in sentencing, including common questions regarding detention.

Don't miss this opportunity to identify the trends, learn about the developments in the field, and hone your practical skills on array of criminal law topics in this ever-changing legal landscape. Learn what the experts are doing to ensure the Constitutional rights of their criminal defendants.

Agenda

- Caselaw Update: 2023 and 2024 Appellate Decisions
- Motor Vehicle Stops and Suppression Remedy
- Body Worn Camera: How to Make it Work for You or Exclude it When it Doesn't
- Common Detention Questions: "Why am I Being Held, and When Can I Get Out?"
- Emerging Adults: Special Litigation Topics
- Advanced Sentencing Advocacy
- *Keynote Speaker*: How to Pick and Persuade a Jury

Faculty

Kevin Chapman, Esq., *Chapman Law PLLC, Peabody*, Cochair
Reyna Ramirez, Esq., *Ramirez and Sunnerberg LLC, Weymouth*, Cochair
Galina Davidoff, Ph.D., *Davidoff Consulting*, Keynote Speaker
Thomas M. Burke, III, Esq., *Law Office of Thomas M. Burke, Salem*
Addison R. Gamliel, Esq., *Committee for Public Counsel Services, Children and Family Law Program, Salem*
Lee J. Gartenberg, Esq., *Middlesex Sheriff's Office (Ret.), Woburn*
Edward A. McNaught, Esq., *Edward A. McNaught III, P.C., Salem*
Melanie J. Roberts, Esq., *Committee for Public Counsel Services, Boston*
Joseph N. Schneiderman, Esq., *Appellate Attorney, Westfield*

More faculty will be announced closer to the Conference!

Dates & Locations

Register at www.mcle.org

BOSTON

Thursday, May 22, 2025
9:00 am–5:00 pm
MCLE Conference Center
10 Winter Place, via Winter Street
Program # 2250255P01

LIVE WEBCAST

Thursday, May 22, 2025
9:00 am–5:00 pm
Program # 2250255WBC

REBROADCAST

Friday, June 6, 2025
9:00 am–5:00 pm
Program # 2250255RB1

REBROADCAST

Monday, June 16, 2025
9:00 am–5:00 pm
Program # 2250255RB2

ON DEMAND WEBCAST

View after Monday, June 16, 2025
Program # 2250255WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Criminal Law Sourcebook & Citator ebook, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for in-person registrants
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 6 CLE credits



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Learn more at www.mcle.org

Counsel's Guide to Arrest, Search & Seizure Law

A comprehensive guide

This program develops your expertise in the complex and ever-evolving realm of suppression litigation in criminal cases and encourages practitioners to think outside the box. You learn about the scope and protections of arrest, search, and seizure laws, providing you with a nuanced understanding of the constitutional principles that govern these critical aspects of criminal investigations. Through a combination of theoretical discussions, case analyses, and practical scenarios, participants gain valuable insights into the latest legal developments, court decisions, and legislative changes shaping the landscape of arrest and evidence gathering.

This program aims to empower attorneys with the tools they need to effectively advocate for their clients, uphold constitutional rights, and navigate the complexities of criminal law practice

Agenda

- Car Stops and Exit Orders
- *Commonwealth v. Long* and Litigating Equal Protection Claims in Motions to Suppress: Strategies and Roadblocks
- Searches of the Person: Frisks, Searches Incident to Arrest, Strip Searches, Cavity Searches
- Discovery Litigation for Suppression
- Practice Tips and "Ask the Experts" Q&A Session

Faculty

Sandra Gant, Esq., *Assistant Federal Public Defender, Federal Public Defender Office, Boston*, Chair

C. Henry Fasoldt, Esq., *C. Henry Fasoldt, Attorney At Law, Boston*

Jennifer Sunderland, Esq., *Sunderland Law, Boston*

Steven Van Dyke, Esq., *Trial Attorney, Committee for Public Counsel Services, Malden*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, May 19, 2025

2:00 pm–5:00 pm

Program # 2250256WBC

REBROADCAST

Tuesday, June 3, 2025

2:00 pm–5:00 pm

Program # 2250256RB1

REBROADCAST

Wednesday, June 11, 2025

9:30 am–12:30 pm

Program # 2250256RB2

ON DEMAND WEBCAST

View after Wednesday, June 11, 2025

Program # 2250256WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Arrest, Search and Seizure Citor ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



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Learn more at www.mcle.org

Create Compelling Visuals for a Criminal Case on a Budget

Present your case without breaking the bank

In today's fast-paced, visually driven world, effective use of graphics, charts, and multimedia can significantly influence the outcome of a case. This program teaches attorneys how to create powerful visuals that simplify complex legal concepts, highlight key evidence, and engage jurors. Participants learn cost-effective techniques for designing high-impact presentations, leveraging free or low-cost software tools, and effectively incorporating visuals into trial strategy, all while adhering to ethical guidelines.

The program covers a variety of visual tools, from timeline charts and crime scene diagrams to persuasive video clips and animated graphics. Special emphasis is placed on balancing aesthetics with clarity and relevance, ensuring visuals enhance rather than distract from the narrative. Experienced trial attorneys provide insights into the most effective visual strategies for criminal cases.

You leave the program with practical skills you can apply immediately to your next case, gaining the confidence to use visuals to strengthen your arguments and deliver compelling, persuasive presentations—even with limited resources.

Agenda

- Budget-Friendly Visual Tools
- Enhancing Case Presentation
- Visual Communication Strategies

Faculty

Connie Tran, Esq., *Law Office of J. Connie Tran, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, April 14, 2025

3:30 pm–5:00 pm

Program # 2250265WBC

REBROADCAST

Tuesday, April 29, 2025

12:00 pm–1:30 pm

Program # 2250265RB1

REBROADCAST

Wednesday, May 7, 2025

10:00 am–11:30 am

Program # 2250265RB2

ON DEMAND WEBCAST

View after Wednesday, May 7, 2025

Program # 2250265WBA

Tuition *(includes written materials)*

- \$160
- \$144.00 MCLE Members
- \$80.00 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1.5 CLE credits



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for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

Criminal Cases: District Court Judicial Forum 2025

A conversation with the bench

Get the benefit of hearing dozens of tips and anecdotes from experienced judges who have spent thousands of hours in the courtroom hearing motions and cases—a unique opportunity whether you are just starting out or have several trials under your belt!

Join our moderator, veteran trial attorney Eileen Morrison, and learn what this panel of District Court judges want practitioners to know about courtroom practice and trial advocacy. The panel format allows the judges to offer their insights on a variety of topics, while also hearing and responding to their colleagues. Don't miss this opportunity to gain invaluable insight into the judicial perspective and be better prepared the next time you walk into District Court!

Agenda

- Prearrestment Diversion for Young Adults
- Delaying Arraignments Pursuant to *Carson C.*, 489 Mass. 54 (2022)
- Section 35
- Probable Cause Hearings
- Nonbinding Bench Trial System as a Model of Judicial Efficiency
- New Coercive Control Definition in G.L. c. 209A
- G.L. c. 123, § 15(b)/A.Z., 493 Mass. 427 (2024)
- *Long* Hearings
- Attorney-Conducted Voir Dire in District Court
- Case Management: Discovery, Motions, and Trial Issues

Faculty

Eileen L. Morrison, Esq., *Committee for Public Counsel Services, Lowell, Chair*
Hon. Michelle Fentress, *Brockton District Court, Commonwealth of Massachusetts*
Hon. Zachary Hillman, *District Court Region 5, Commonwealth of Massachusetts*
Hon. Meghan S. Spring, *Marlborough District Court, Commonwealth of Massachusetts*
Hon. Gregory P. Teran, *Region 6 District Court, Commonwealth of Massachusetts*
Hon. Marjorie P. Tynes, *Administrative Office of the District Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, June 3, 2025
2:00 pm–5:00 pm
Program # 2250258WBC

REBROADCAST

Wednesday, June 18, 2025
9:30 am–12:30 pm
Program # 2250258RB1

REBROADCAST

Thursday, June 26, 2025
2:00 pm–5:00 pm
Program # 2250258RB2

ON DEMAND WEBCAST

View after Thursday, June 26, 2025
Program # 2250258WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts District Court Criminal Defense Manual ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



Subscribe to the MCLE OnlinePass®

for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

Discovery Issues in Criminal Cases

Navigating the hidden treasures of criminal discovery

This program provides an in-depth analysis of (anticipated) recent updates to Massachusetts Rule of Criminal Procedure 14, exploring its impact on criminal discovery. Participants gain practical knowledge of their *Brady* obligations, ensuring compliance with constitutional duties to disclose exculpatory evidence. The program also delves into strategies for effectively obtaining third-party discovery, emphasizing tools and tactics to secure vital evidence while navigating procedural hurdles.

Attendees explore the critical differences between federal and state discovery practices, comparing frameworks, timelines, and disclosure requirements to sharpen their advocacy across jurisdictions. Led by seasoned practitioners, the program combines expert insights and actionable takeaways to enhance participants' proficiency in managing criminal discovery.

Whether you are a seasoned attorney or new to the field, this program equips you with the skills and knowledge to navigate the complexities of discovery in today's legal landscape.

Agenda

- (Anticipated) Recent Changes to Mass. R. Crim. P. 14
- *Brady* Obligations
- Obtaining Third-Party Discovery
- Difference Between Federal and State Discovery Practice

Faculty

Alyssa T. Hackett, Esq., *Law Office of Alyssa T. Hackett, Boston*, Chair

Christopher Dearborn, Esq., *Clinical Professor of Law, Suffolk University Law School, Boston*

J. Annie Iglehart, Esq., *Iglehart & Porges, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, May 14, 2025

2:00 pm–4:00 pm

Program # 2250264WBC

REBROADCAST

Thursday, May 29, 2025

2:00 pm–4:00 pm

Program # 2250264RB1

REBROADCAST

Friday, June 6, 2025

9:30 am–11:30 am

Program # 2250264RB2

ON DEMAND WEBCAST

View after Friday, June 6, 2025

Program # 2250264WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

Forensic Accounting & Finance Basics for Criminal Lawyers Handling Financial Crime Allegations

Unmasking the numbers

As financial crimes become increasingly complex, understanding the financial intricacies of a case is crucial for defending clients effectively. This program introduces key concepts such as financial statements, cash flow analysis, forensic auditing techniques, and the identification of fraudulent schemes, providing attorneys with the foundational skills needed to navigate financial crime allegations. Whether you are defending against fraud, embezzlement, money laundering, or tax evasion charges, this program gives you the tools to understand the financial evidence at the heart of the case.

Through a mix of practical examples and expert insights, participants learn how to assess financial documents, identify red flags, and work with forensic experts to challenge the prosecution's evidence. The program also explores the role of financial experts in criminal trials and offers strategies for collaborating with accountants and auditors to build a strong defense. By the end of the course, you will have a solid understanding of the financial concepts that underpin financial crime allegations, enabling you to spot weaknesses in the other side's case, question expert testimony, and effectively advocate in the courtroom.

Agenda

- Understanding Financial Statements
- Forensic Accounting Techniques
- Challenging Financial Evidence
- Collaborating with Financial Experts

Faculty

Tracy A. Miner, Esq., *Miner Siddall LLP, Boston*, Chair

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, July 22, 2025

2:30 pm–5:00 pm

Program # 2250267WBC

REBROADCAST

Wednesday, August 6, 2025

10:00 am–12:30 pm

Program # 2250267RB1

REBROADCAST

Thursday, August 14, 2025

2:30 pm–5:00 pm

Program # 2250267RB2

ON DEMAND WEBCAST

View after Thursday, August 14, 2025

Program # 2250267WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

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Materials

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CLE Credits

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Guns, Drugs & Money

Get street-smart and learn the best way to litigate gun and drug cases

Cases involving weapons charges, drug activity, and the money that accompany them aren't for the faint of heart—they're fact-intensive, law driven cases and demand a deep knowledge of "the way things work." Are you hip to the latest pharmacopeia that snake its way through Massachusetts' urban and suburban neighborhoods? Learn how to litigate the issue of the changes taking place with Massachusetts firearms law. Get the inside scoop on what key areas you want to preserve for appellate issues. Find ways where the intersection of mental health and substance use can aid in mitigation and defense.

Join us at this program and learn practical tips for prosecuting and defending gun and drug cases. Let this diverse panel of experts from both sides of the aisle bring you up to speed. Come away from this training with the "street smarts" you need to try cases surrounding the triumvirate of crime—*Guns, Drugs & Money*—and don't miss your chance to see the latest street drugs at play in your cases and observe an explosives and firearms K9 at work.

Agenda

- Drug Buy-Busts and Racial Profiling
- Intersection of Drug Cases and Mental Health
- Drug Investigations Update with Show & Tell
- EOD Dog Training and Investigations with Demonstration
- From the Appellate Perspective: Crucial Areas to Preserve the Record
- Prosecuting Guns and the New Changes to the Firearms Statutes

Faculty

Jason T. Green, Esq., *Committee for Public Counsel Services, Brockton, Chair*
Brian Coen, *Drug Control Unit, City of Quincy Police Department, Quincy*
Greg A. Danas, *President, G&G Firearms Experts, Inc., Lowell*
Karissa Flynn, Esq., *Supervising Attorney, Committee for Public Counsel Services, Brockton*
Patrick Levin, Esq., *Committee for Public Counsel Services, Boston*
Gladys Morgan, *Officer, K9 Handler, Abington Police Department, Abington*
Justin Simmons, *Lieutenant, Abington Police Department, Abington*
Jasmine M. Villanueva-Simms, Esq., *Committee for Public Counsel Services, Brockton*
Alexander C. Zane, Esq., *Plymouth District Attorney's Office, Commonwealth of Massachusetts*

Dates & Locations

Register at www.mcle.org

BOSTON

Thursday, July 10, 2025
9:30 am–4:30 pm
MCLE Conference Center,
10 Winter Place, via Winter Street
Program # 2250266P01

LIVE WEBCAST

Thursday, July 10, 2025
9:30 am–4:30 pm
Program # 2250266WBC

REBROADCAST

Friday, July 25, 2025
9:30 am–4:30 pm
Program # 2250266RB1

REBROADCAST

Monday, August 4, 2025
9:30 am–4:30 pm
Program # 2250266RB2

ON DEMAND WEBCAST

View after Monday, August 4, 2025
Program # 2250266WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Trying Drug Cases in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for in-person registrants
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 6 CLE credits



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for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

Handling an Assault & Battery Case

Evidence, witnesses, arguments

While most criminal cases are resolved via plea bargain, it is imperative to understand the ins-and-outs of the District Court trial session. This seminar explains the major aspects of a trial from motions in limine to closings. The panel of trial attorneys and a District Court judge guides you through the case while you serve as jury.

Unlike the jury, however, you have the opportunity to ask questions after the verdict! Case theory, witness preparation, and strategy are all open for discussion. Find out how experienced trial attorneys prepare their case for trial, from the day of arraignment.

Agenda

- Motions in Limine
- Opening Statements
- Direct and Cross of a Police Witness
- Direct and Cross of a Civilian Witness
- Closing Arguments
- Judicial Opinion
- Witness Preparation
- Preserving the Record
- “Ask the Experts” Q&A Session

Faculty

Sarah Stancato McEvoy, Esq., *Suffolk District Attorney's Office, Commonwealth of Massachusetts*,
Chair

Brendan S. Cox Law, Esq., *Laredo & Smith LLP, Boston*

Hon. Rebeca Figueroa, *Boston Municipal Court, Commonwealth of Massachusetts*

Alexandra Paige Rahimi, Esq., *Suffolk District Attorney's Office, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, March 25, 2025

2:00 pm–5:00 pm

Program # 2250261WBC

REBROADCAST

Wednesday, April 9, 2025

9:30 pm–12:30 pm

Program # 2250261RB1

REBROADCAST

Thursday, April 17, 2025

2:00 pm–5:00 pm

Program # 2250261RB2

ON DEMAND WEBCAST

View after Thursday, April 17, 2025

Program # 2250261WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Learn more at www.mcle.org

Handling OUI Cases

See how the evidence is gathered and learn how to try and defend the case!

Operating under the influence cases are high stakes litigation, whether you are the defense counsel or the prosecutor assigned to the case. This year's OUI program begins with the basics, and then delves into the nuances to bring you up to speed on recent developments, including OUI drug cases. Attorneys for the prosecution and the defense provide an overview of how to handle an OUI case from start to finish. Panelists address preparation for handling the trial, including discussions about field sobriety tests, discovery issues, drug recognition experts, and breath and blood testing.

Whether you specialize in OUI cases or handle only one or two of these types of cases a year, you don't want to miss the opportunity to hone your skills with the experts. Not only do you get a skills refresher—you come away with practice tips and advice that help you handle your next case with confidence. Bring your questions for the District Court judges to take advantage of this unique opportunity to find out what they are looking for in OUI cases.

Litigation regarding the admissibility of breath test results has continued to evolve over the past year. Attend this program to get ahead of the curve on where OUI litigation is now and where it is headed.

Agenda

- OUI Drugs
- Client Intake
- Trial Preparation
- Discovery
- Field Sobriety Tests
- Breath Tests
- Blood Tests
- Getting Evidence Admitted or Excluded at Trial
- View from the Bench
- "Ask the Experts" Q&A Session

Faculty

James M. Milligan, Jr., Esq., *Law Office of James M. Milligan, Jr., Hanover, Chair*

Hon. Michael D. Brennan, *First Justice, Taunton District Court, Commonwealth of Massachusetts*

Robert Joseph Galibois, III., Esq., *Cape & Islands District Attorney's Office, Commonwealth of Massachusetts*

Joseph J. Higgins, III, Esq., *Law Office of James M. Milligan, Jr., Hanover*

Hon. Edward H. Sharkansky, *Wareham District Court, Commonwealth of Massachusetts*

Jim Smith, *Sergeant, Hanover Police Department, Hanover*

Dates & Locations

Register at www.mcle.org

BOSTON

Thursday, March 20, 2025

9:30 am–4:30 pm

MCLE Conference Center

10 Winter Place, via Winter Street

Program # 2250257P01

LIVE WEBCAST

Thursday, March 20, 2025

9:30 am–4:30 pm

Program # 2250257WBC

REBROADCAST

Friday, April 4, 2025

9:30 am–4:30 pm

Program # 2250257RB1

REBROADCAST

Monday, April 14, 2025

9:30 am–4:30 pm

Program # 2250257RB2

ON DEMAND WEBCAST

View after Monday, April 14, 2025

Program # 2250257WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Trying OUI and Other Motor Vehicle Offenses in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 6 CLE credits



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Learn more at www.mcle.org

Managing Expert Witnesses in Criminal Cases in District & Superior Court

Strengthen your case with the use of experts

Expert testimony is becoming increasingly important in the cases we try in District and Superior Court. Having a firm grasp of what experts can do for you and your case can make all the difference in strengthening your case. Hear from prosecutors and defense attorneys who routinely deal with experts and discuss some of the most commonly used experts and how to utilize them in your cases.

Join us to learn how to use experts to strengthen your case and get up-to-speed on the issues you need to know.

Agenda

- How to Identify Cases Which May Need an Expert
- Five Most Commonly Used Experts: Ballistics, Latent Prints, GPS, DNA, Delayed Disclosure
- How to Use Experts as a Prosecutor
- How to Use Experts as a Defense Attorney
- “Ask the Experts” Q&A Session

Faculty

Jessica L. Tripp, Esq., *The Law Office of Jessica L. Tripp, Dorchester*, Chair

Hon. Christopher P. Belezos, *Superior Court, Commonwealth of Massachusetts*

Caitlin Fitzgerald, Esq., *Suffolk District Attorney's Office, Commonwealth of Massachusetts*

Laura Montgomery, Esq., *Suffolk District Attorney's Office, Commonwealth of Massachusetts*

William J. Sprouse, Esq., *William J. Sprouse, Attorney at Law, Malden*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, June 12, 2025

2:00 pm–5:00 pm

Program # 2250263WBC

REBROADCAST

Friday, June 27, 2025

9:30 am–12:30 pm

Program # 2250263RB1

REBROADCAST

Tuesday, July 8, 2025

2:00 pm–5:00 pm

Program # 2250263RB2

ON DEMAND WEBCAST

View after Tuesday, July 8, 2025

Program # 2250263WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Mock Trial of a Domestic Violence Case in District Court

Hear the evidence, be the jury, and discuss the strategy

This seminar guides you through the major aspects of a District Court domestic violence trial—from motions in limine to closing arguments. The panel of trial attorneys and a District Court judge present the case and you act as jury!

Unlike the jury, however, you have the opportunity to ask questions after the verdict! Case theory, witness preparation, and strategy are all open for discussion. Find out how experienced trial attorneys prepare their case for trial, starting with the day of arraignment.

Agenda

- Motions in Limine
- Opening Statements
- Direct and Cross of a Police Witness
- Direct and Cross of a Civilian Witness
- Closing Arguments
- Judicial Opinion
- Witness Preparation
- Presentation of Exhibits
- “Ask the Experts” Q&A Session

Faculty

Erin Murphy, Esq., *Suffolk District Attorney's Office, Commonwealth of Massachusetts*, Chair

Hon. Rebeca Figueroa, *Boston Municipal Court, Commonwealth of Massachusetts*

Jillian M. Kennedy, Esq., *Suffolk District Attorney's Office, Commonwealth of Massachusetts*

Jessica L. Tripp, *The Law Office of Jessica L. Tripp, Dorchester*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, April 9, 2025

2:00 pm–5:00 pm

Program # 2250260WBC

REBROADCAST

Thursday, April 24, 2025

2:00 pm–5:00 pm

Program # 2250260RB1

REBROADCAST

Friday, May 2, 2025

9:30 am–12:30 pm

Program # 2250260RB2

ON DEMAND WEBCAST

View after Friday, May 2, 2025

Program # 2250260WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



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Obtaining & Defending Against 209A & 258E Protective Orders

How to navigate the complexities of the changing protection order landscape

This program equips attorneys with essential skills for both obtaining and defending protective orders. The program explores procedural, legal, and strategic complexities, with guidance from experienced legal services and private attorneys. Attendees gain a nuanced understanding of challenges, best practices, and current trends in protective order cases.

Through case studies, practical strategies, and recent legal updates, attendees learn effective advocacy techniques, ethical considerations, and key legal arguments pertinent to restraining orders. The program also examines intersections with criminal and civil cases, providing insights into how protective orders impact and interact with other legal matters. Whether representing victims of violence or defending clients facing claims, this training provides actionable knowledge for success in this complex area of law.

Agenda

- Key Distinctions Between 209A and 258E Restraining Orders
- Procedural Outline of the Restraining Order Process
- Coercive Control and Other Recent Developments
- Intersection of Protective Orders with Criminal and Civil Cases
- Strategic Arguments and Common Defenses
- Effective Client Counseling
- Enforcement of Protective Orders
- Motions to Modify Existing Orders
- Ask the Experts Q&A Session

Faculty

Stephanie F. Holt, Esq., *Victim Rights Law Center, Boston, Chair*

Tom Miller, Esq., *Zalkind, Duncan & Bernstein LLP, Boston*

Victoria S. Miranda, Esq., *Callahan, Barraco, Inman & Bonzagni, Westborough*

Lola Remy, Esq., *Director of Pro Bono Programs, Women's Bar Foundation, Boston*

Kelsey Worline, Esq., *Victim Rights Law Center, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, June 24, 2025

2:30 pm–5:00 pm

Program # 2250262WBC

REBROADCAST

Wednesday, July 9, 2025

9:30 am–12:00 pm

Program # 2250262RB1

REBROADCAST

Thursday, July 17, 2025

2:30 pm–5:00 pm

Program # 2250262RB2

ON DEMAND WEBCAST

View after Thursday, July 17, 2025

Program # 2250262WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Obtaining, Enforcing, and Defending c. 209A Restraining Orders in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2.5 CLE credits



Subscribe to the MCLE OnlinePass[®]

for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

Prosecuting & Defending Homicide Trials

Current science and strategies in homicide trials

In your criminal law practice, the stakes are highest when homicide is the charge—a life has been lost. Another may face the strictest sentencing our legal system can impose. No matter which side of the counsel table you hail from—prosecution or defense—this program amps up your awareness of the most determinative scientific and social factors in homicide trials. Our panel brings you current on what is happening in Massachusetts courts on both fronts. They present the latest on introducing certain pieces of evidence, discuss *Mattis* and emerging adults, and examine panel/attorney-conducted voir dire. You come away from this program savvier, more aware, and more knowledgeable.

Raise your homicide practice to a higher level.

Agenda

- Introducing Certain Pieces of Evidence
- Panel/Attorney-Conducted Voir Dire
- *Mattis* and Emerging Adults
- Caselaw Update
- “Ask the Experts” Q&A Session

Faculty

Debra Dewitt Ahern, Esq., *Ahern Law Offices, Lowell*, Cochair

Suzanne M. Wiseman, Esq., *Middlesex District Attorney's Office, Commonwealth of Massachusetts*, Cochair

Hon. Jay D. Blitzman (ret.), *Watertown*

Hon. Patrick M. Haggan, *Superior Court, Commonwealth of Massachusetts*

Mark Tan Lee, Esq., *Suffolk District Attorney's Office, Commonwealth of Massachusetts*

Kate B. MacDougall, Esq., *Essex District Attorney's Office, Commonwealth of Massachusetts*

Megan C. McGovern, Esq., *Middlesex District Attorney's Office, Commonwealth of Massachusetts*

Lorenzo Perez, Esq., *Law Office of Lorenzo Perez, PC, Boston*

Ryan P. Sullivan, Esq., *Ryan Sullivan Law, PC, Lowell*

Austin C. Tzeng, Esq., *Law Office of Austin C. Tzeng, Quincy*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, April 29, 2025

9:30 am–4:30 pm

Program # 2250259WBC

REBROADCAST

Wednesday, May 14, 2025

9:30 am–4:30 pm

Program # 2250259RB1

REBROADCAST

Thursday, May 22, 2025

9:30 am–4:30 pm

Program # 2250259RB2

ON DEMAND WEBCAST

View after Thursday, May 22, 2025

Program # 2250259WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Trying Murder and Other Homicide Cases in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 6 CLE credits



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Learn more at www.mcle.org

Advising Employers & Employees on Off-Duty Conduct & Privacy in the Workplace

Learn how to navigate the changing tides of the law governing workplace privacy and employee off-duty conduct

The steadily increasing amount and prevalence of social media and data mining, combined with changes in federal and state law, have created thorny, ever-evolving challenges for employers, employees, and employment counsel related to employee privacy and off-duty conduct. Our panel of experts representing individual employees and employers provide practical advice to help you better understand the dangers facing employees as well as the sensitive balance between employers' business interests and employees' privacy rights that employers must navigate. This includes key insights into how access to employee information can unconsciously taint decision-making and lead to legal claims and liability and how actions that an employee may consider to be personal and irrelevant to their work life can lead to negative consequences at work.

The panelists offer a full range of perspectives, including that of in-house counsel, management lawyers, and employee-side counsel. Get up-to-date guidance on workplace privacy concerns and issues related to off-duty or off-site conduct that arise every day in the workplace—from hiring through retention, employee discipline, and termination.

Agenda

- Pre-Employment Background Checks
- Interplay Between Workplace Drug Testing and Legal Marijuana Use
- Employment Decisions Based on Employee Use of Social Media, In and Out of the Workplace
- Data Mining and Employee Hiring
- Employee Social Gatherings and Off-Site Harassment
- Limits on Confidentiality, Non-Disparagement, and Non-Compete clauses in Workplace, Separation and Severance Agreements
- Impact of Other Post-Employment, Off-Duty Conduct (i.e., Uniform Trade Secrets Act, Non-Solicitation Obligations, 93A Violations)
- “Ask the Experts” Q&A Session

Faculty

Michael R. Bertoncini, Esq., *Jackson Lewis, PC, Boston*, Chair

Kiley M. Belliveau, Esq., *Dana-Farber Cancer Institute, Boston*

Jill Havens, Esq., *Workplace Justice Law Group, LLC, Jamaica Plain*

James S. Weliky, Esq., *Messing, Rudavsky & Weliky, PC, Newton*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, June 4, 2025

9:30 am–11:30 am

Program # 2250171WBC

REBROADCAST

Thursday, June 19, 2025

2:00 pm–4:00 pm

Program # 2250171RB1

REBROADCAST

Friday, June 27, 2025

12:00 pm–2:00 pm

Program # 2250171RB2

ON DEMAND WEBCAST

View after Friday, June 27, 2025

Program # 2250171WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Best Practices for Defining & Drafting Job Descriptions

Key considerations and pitfalls to avoid, ensuring a mutual understanding of the employment relationship

Job descriptions are a critical tool for employers. If well drafted, job descriptions objectively define the expectations for the position, while ensuring that the employee understands the lens via which performance will be evaluated. This transparency enables the employer and the employee to have a mutual understanding of their employment relationship.

Ensuring that job descriptions describe the position's essential functions is key as job descriptions should be at the front and center of reasonable accommodation discussions. Defining the essential functions for the position in the job description allows for a productive interactive dialogue and maximizes the opportunity to preserve the employment relationship. Conversely, not having well-drafted job descriptions can be detrimental to the employer and foster disagreements about what is essential. Those disagreements may be avoided if the employer has well-drafted job descriptions. Join us for an engaging discussion on best practices when drafting job descriptions, key considerations, and certain pitfalls that employers can avoid by having well-defined job descriptions.

Agenda

- Why Does Having a Well-Drafted Job Description Matter?
- Step-By-Step Considerations When Drafting a Job Description
- What Is an Essential Function v. What Is Non-Essential?
- Ensuring That Employees Acknowledge Receipt of Their Job Description
- Updates and Revisions When Positions Evolve and/or When Employees Transition into Different Roles
- Best Practices and Key Considerations

Faculty

Michelle M. De Oliveira, Esq., *Kenney & Sams, PC, Southborough*, Chair
Kavita M. Goyal, Esq., *Rosen & Goyal, PC, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, May 5, 2025
10:00 am–11:00 am
Program # 2250177WBC

REBROADCAST

Tuesday, May 20, 2025
12:00 pm–1:00 pm
Program # 2250177RB1

REBROADCAST

Wednesday, May 28, 2025
3:00 pm–4:00 pm
Program # 2250177RB2

ON DEMAND WEBCAST

View after Wednesday, May 28, 2025
Program # 2250177WBA

Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Members
- \$72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1 CLE credit



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for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

Dos and Don'ts for Managing Personnel Records

Employer obligations, employee rights, and risks of non-compliance under the Massachusetts Personnel Records Statute

Massachusetts G.L. c. 149 § 52C is a robust statute that governs employer obligations with respect to retention and management of personnel records. Complying with these complex requirements can be a significant challenge. Failure to comply can, however, lead to serious consequences for employers.

Agenda

- Critical Importance of Properly Retaining and Managing Personnel Records
- Documents That Must Be Maintained as Personnel Records
- Employee Notification Requirements Related to Personnel Records
- Employee Rights to Obtain Their Personnel Records
- Issues Related to Employee Medical Records
- Retention Requirements
- Attorney General Enforcement
- Litigation Implications

Faculty

Tamsin R. Kaplan, Esq., *Davis, Malm & D'Agostine, PC, Boston*, Chair
John F. Tocci, Esq., *Tocci & Lee LLC, Westwood*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, March 20, 2025
12:00 pm–1:00 pm
Program # 2250176WBC

REBROADCAST

Friday, April 4, 2025
9:00 am–10:00 am
Program # 2250176RB1

REBROADCAST

Monday, April 14, 2025
3:00 pm–4:00 pm
Program # 2250176RB2

ON DEMAND WEBCAST

View after Monday, April 14, 2025
Program # 2250176WBA

Tuition *(includes written materials)*

- \$145
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Materials

Massachusetts Employment Law ebook, plus speaker materials

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Inner Workings of the MCAD

Hear directly from MCAD personnel and private practitioners

First established in 1946 as the Fair Employment Practices Commission with a staff of two and three volunteer commissioners, the Massachusetts Commission Against Discrimination (MCAD) now occupies a central role in investigating and prosecuting claims of employment discrimination involving Massachusetts employees and employers. All claimants wishing to vindicate their rights under Massachusetts anti-employment-discrimination statutes must first file their cases with the MCAD.

Attend this program for a unique opportunity to meet and hear from the MCAD's senior hearing officer, the MCAD's senior attorney advisor, an MCAD compliance officer supervisor, and experienced practitioners who regularly handle cases before the Commission. Hear them explain the intake and investigation process—including position statements and rebuttals, opportunities for alternative dispute resolution, the discovery and public hearing process, the impact of the Commission's revised procedural regulations, and other changes at the Commission. For practitioners new to the MCAD, this program provides a valuable explanation of the Commission's inner workings at every stage of its investigation and enforcement process. For experienced practitioners, the program offers an opportunity to hear directly from key Commission officials and improve your efficacy in advocating for your clients, whether employees or employers. Bring your questions!

Agenda

- **Intake and Investigation Process**
 - Filing claims at the MCAD; Effective position statements and rebuttals; Investigative Conference; Pre-determination discovery; Causal determinations
- **Alternative Dispute Resolution**
 - Opportunities for early mediation; Pre-cause mediation; Conciliation process
- **Post-Cause Proceedings**
 - Post-certification discovery; Discovery disputes
- **Public Hearing Process**
 - Certification and pre-hearing conferences; Conduct of the public hearing; Remedies; Proposed findings; Full Commission review
- **"Ask the MCAD" Q&A Session**

Faculty

James S. Weliky, Esq., *Messing, Rudavsky & Weliky, PC, Newton*, Chair
Jason B. Barshak, Esq., *Senior Hearing Officer, Massachusetts Commission Against Discrimination, Commonwealth of Massachusetts*
Patrice Dixon, Esq., *Constangy, Brooks, Smith & Prophete LLP, Boston*
Gina Leonard, *Compliance Officer, Supervisor—Unit 1, Massachusetts Commission Against Discrimination, Commonwealth of Massachusetts*
Lila Roberts, Esq., *Supervisor, Attorney Advisors Unit, Massachusetts Commission Against Discrimination, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, April 1, 2025
2:00 pm–5:00 pm
Program # 2250169WBC

REBROADCAST

Wednesday, April 16, 2025
9:00 am–12:00 pm
Program # 2250169RB1

REBROADCAST

Thursday, April 24, 2025
10:00 am–1:00 pm
Program # 2250169RB2

ON DEMAND WEBCAST

View after Thursday, April 24, 2025
Program # 2250169WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
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Materials

Representing Clients Before the MCAD in Employment Cases ebook, plus speaker materials

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Massachusetts Leave Laws Made Simple

The contours and intersection of Massachusetts leave laws and their interplay with employers' private plans and policies

In Massachusetts, employees are eligible for paid and unpaid leave in a range of situations, benefiting from the protection of a myriad of state and federal laws. These include the Massachusetts Paid Family and Medical Leave Act (PFML), federal Family and Medical Leave Act (FMLA), Massachusetts Earned Sick Time Law, Massachusetts Domestic Violence Leave Act (DVLA), and the Massachusetts Pregnant Workers Fairness Act (PWFA), among others. Often, these leave laws intersect with each other, creating many questions for employers and employees. Learn about the contours of each law and their intersection, as well as their interplay with employers' private plans and policies. The panelists provide hypothetical examples to highlight the practical nuances seen in the workplace. Ask your questions to personalize the agenda.

Agenda

- Overview of Leave Laws: FMLA, PFML, Earned Sick Time, DVLA, PWFA, and Leave as a Reasonable Accommodation Protected by G.L. c. 151B, § 4(16) and the Americans with Disabilities Act Amendments Act (ADAAA)
- PFML in Depth: Benefit and Allotment Calculation, Portability of Eligibility and Benefits Following a Change in Employment or Change in Provider, and Employers' Notice Obligations
- Benefits Coordination: Interplay of PFML with Private Plans, Internal Policies, Short-Term Disability, and the FMLA

Faculty

Gavriela M. Bogin-Farber, Esq., *Segal Roitman LLP, Boston*, Chair

William J. Alpine, Jr., Esq., *Director, Department of Family and Medical Leave, Commonwealth of Massachusetts*

Carla A. Reeves, Esq., *Goulston & Storrs, PC, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Friday, April 4, 2025

9:00 am–12:00 pm

Program # 2250166WBC

REBROADCAST

Monday, April 21, 2025

11:00 am–2:00 pm

Program # 2250166RB1

REBROADCAST

Tuesday, April 29, 2025

2:00 pm–5:00 pm

Program # 2250166RB2

ON DEMAND WEBCAST

View after Tuesday, April 29, 2025

Program # 2250166WBA

Tuition *(includes written materials)*

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Materials

Employee Leave and Accommodations Law in Massachusetts ebook, plus speaker materials

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New Strategies for Successfully Trying & Arbitrating Employment Cases

Cutting-edge strategies for planning and presenting your case in court, at arbitration, and in mediation

Learn tactics to give your clients their best shot at prevailing in an employment case.

Agenda

- **The Complexities of Jury Selection in an Increasingly Complex World**
 - Cultural flashpoints—how continuing polarization nationally is reflected in our jury pool (religion, homophobia/transgender issues, geopolitical wars, and implicit bias)
 - Effective use of juror questionnaires
 - Focus groups
 - Judge v. lawyer-led voir dire
 - Jury consultants—to use or not to use?
- **Expert Witnesses—Is It Worth the Money?**
 - *Daubert* and evolving Massachusetts precedent
 - Admitting expert testimony under FRE 702 and junk science
 - Economic/damages experts
 - Implicit bias/human resources experts
 - Psychiatric/emotional distress experts
- **Managing Remote Witness Testimony at Deposition and at Trial—Do's and Don'ts**
 - How to minimize the chance of coaching
 - Are remote depositions as effective?
 - Technology in the courtroom and at mediation/arbitration, too
 - When to record a deposition
 - How to handle out-of-state witnesses—or those that are unavailable for trial
- **Trial Presentation Techniques—Nuts and Bolts**
 - PowerPoints/chalks v. poster boards
 - Chronologies or timelines
 - Charts and tables
 - How and when to use a chalk
- **Increasing Use of Generative Artificial Intelligence in Litigation Practice**
 - Research
 - Document review
 - Document drafting
 - Rules of professional conduct—confidentiality and accuracy

Faculty

David E. Belfort, Esq., *Bennett & Belfort, PC, Cambridge*, Cochair; Monica R. Shah, Esq., *Zalkind Duncan & Bernstein LLP, Boston*, Cochair; Lynn A. Kappelman, Esq., *Seyfarth Shaw LLP, Boston*; Hon. Bonnie H. MacLeod, *JAMS, Boston*; *Superior Court, Commonwealth of Massachusetts* (Ret.)



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Dates & Location

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LIVE WEBCAST

Thursday, May 22, 2025
12:00 pm–2:00 pm
Program # 2250168WBC

REBROADCAST

Friday, June 6, 2025
9:00 am–11:00 am
Program # 2250168RB1

REBROADCAST

Monday, June 16, 2025
2:00 pm–4:00 pm
Program # 2250168RB2

ON DEMAND WEBCAST

View after Monday, June 16, 2025
Program # 2250168WBA

Tuition *(includes written materials)*

- \$175
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Materials

Massachusetts Courtroom Advocacy ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Responding to Legal Challenges with Regard to DEIB Initiatives in the Workplace

Next steps after Students for Fair Admissions, Inc. and other legal challenges

The U.S. Supreme Court's recent decisions in the *Students for Fair Admissions, Inc.* cases have had a significant impact on affirmative action in college admission programs. In response, certain public interest groups have filed a series of lawsuits attacking some aspects of corporate diversity, equity, inclusion and belonging (DEIB) programs. Learn about the legal issues surrounding DEIB efforts in workplaces and the impact the Supreme Court's recent decisions, and the resulting lower court litigation, has had and may continue to have on these initiatives. Hear from both sides of the employment bar about the legal issues to consider when advising clients in this area.

Agenda

- Learn About the Supreme Court's Decisions in *Students for Fair Admissions, Inc. v. President & Fellows of Harvard College* and *Students for Fair Admissions, Inc. v. University of North Carolina*, and the Resulting Wave of Lawsuits Attacking Corporate DEIB Programs
- What These Lawsuits May Mean for Workplace DEIB Efforts
- Understanding the Legal Issues Involved in Implementing a DEIB Program
- Case Study: Review of Recent Litigation and Lessons Learned
- Considerations and Pitfalls for Advising Clients on Preventing and Responding to Lawsuits Regarding DEIB Initiatives

Faculty

Alexandra L. Pichette, Esq., *Morgan, Brown & Joy LLP, Boston*, Cochair

Keerthi Sugumaran, Esq., *Jackson Lewis, PC, Boston*, Cochair

Emma M. Quinn-Judge, Esq., *Zalkind, Duncan & Bernstein, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, March 18, 2025

2:00 pm–4:00 pm

Program # 2250174WBC

REBROADCAST

Wednesday, April 2, 2025

9:00 am–11:00 am

Program # 2250174RB1

REBROADCAST

Thursday, April 10, 2025

12:00 pm–2:00 pm

Program # 2250174RB2

ON DEMAND WEBCAST

View after Thursday, April 10, 2025

Program # 2250174WBA

Tuition *(includes written materials)*

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Roadmap to the ADA Interactive Process

Understand the rights of employees with disabilities seeking accommodations in the evolving landscape of paid family and medical leave, remote work, and workplace redesign

Counsel for employers and employees grapple daily with how to engage in the interactive process under the Americans with Disabilities Act (ADA) and parallel state law. The process has been complicated by the evolving workplace layered on top of new leave statutes and the post-pandemic work environment. Employment lawyers must advise clients about medical leave, remote work, and workplace redesign in the context of determining the rights of employees with disabilities seeking accommodations.

Agenda

- What Triggers the Employer's Obligations to Engage in the Interactive Process?
- Best Practices for Seeking and Conducting the Interactive Process
- What Is Considered an "Accommodation"—and What Isn't—in the Changing Workplace?
- Accommodations for Mental Health Issues
- "Ask the Experts" Q&A Session

Faculty

Ellen J. Messing, Esq., *Messing, Rudavsky & Weliky, PC, Newton*, Cochair

Alexandra L. Pichette, Esq., *Morgan, Brown & Joy LLP, Boston*, Cochair

Jason B. Barshak, Esq., *Massachusetts Commission Against Discrimination, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Friday, May 9, 2025

9:30 am–12:30 pm

Program # 2250167WBC

REBROADCAST

Tuesday, May 27, 2025

2:00 pm–5:00 pm

Program # 2250167RB1

REBROADCAST

Wednesday, June 4, 2025

10:00 am–1:00 pm

Program # 2250167RB2

ON DEMAND WEBCAST

View after Wednesday, June 4, 2025

Program # 2250167WBA

Tuition *(includes written materials)*

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Snapshot of the Noncompete Landscape Now

Update on evolving state and federal legislation, and potential federal regulatory efforts

Noncompetes and other related restrictive covenants are important tools used by companies to protect trade secrets, customer relationships, the integrity of their workforces, and other recognized legitimate business interests. But they are also sometimes used for improper purposes. Spurred on by media accounts of those improper uses, state legislatures have been increasingly constricting the use of noncompetes and have recently started focusing on other restrictive covenants as well. They have been joined by Congress, the National Labor Relations Board General Counsel, and the Federal Trade Commission (FTC), which in 2024 issued a rule purporting to ban noncompetes and other restrictive covenants deemed to function like a noncompete. While the FTC's rule will likely fade into history, the possibility that the FTC will bring enforcement actions against companies using noncompetes still looms large.

This program provides an update on evolving state and federal legislation, and potential federal regulatory efforts aimed at possibly narrowing the protections provided by noncompetes and other restrictive covenants.

Agenda

- Updates on Recent Massachusetts Case Law Interpreting the 2018 Massachusetts Noncompete Law
- Recent State Legislative Changes Around the Country, and the Status of Federal Legislative and Regulatory Efforts
- How State and Federal Legislative and Regulatory Changes Impact the Hiring of Employees, Including Out-of-State Employees, and the Enforcement of Existing Agreements
- Strategies for Protecting Companies' Trade Secrets, Customer Relationships, and Other Legitimate Business Interests in the Face of Increasing Legislative and Regulatory Restrictions

Faculty

Russell Beck, Esq., *Beck Reed Riden LLP, Boston*, Chair

David I. Brody, Esq., *Sherin and Lodgen LLP, Boston*

Kimberly E. Carson, Esq., *Quinn Emanuel Urquhart & Sullivan, LLP, New York, NY*

Nicole Corvini Daly, Esq., *Beck Reed Riden LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, March 5, 2025

12:00 pm–1:30 pm

Program # 2250172WBC

REBROADCAST

Thursday, March 20, 2025

2:00 pm–3:30 pm

Program # 2250172RB1

REBROADCAST

Friday, March 28, 2025

9:00 am–10:30 am

Program # 2250172RB2

ON DEMAND WEBCAST

View after Friday, March 28, 2025

Program # 2250172WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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Materials

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CLE Credits

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What Employers Can & Cannot Ask During the Lifecycle of the Employment Relationship

Permissible versus impermissible questions that employers may ask during the lifecycle of the employment relationship

While obtaining information from employees during the lifecycle of the employment relationship is important to ensure that the employee is qualified for the job, employers should be wary of the limitations regarding the questions that they can ask and the restrictions that employers can impose on employees. Important employer considerations commence from the time the job posting is drafted and continue through the end of the employment relationship, and beyond.

Join us for a comprehensive discussion of the nuts and bolts of permissible versus impermissible questions that employers can ask during the lifecycle of the employment relationship.

Agenda

- **Pre-Employment**
 - Job postings
 - Job application and voluntary disclosures
 - Interview process
 - Post-offer employment screening
 - Consent and disclosures relating to CORI, drug testing, convictions, etc.
 - Employment agreements
- **The Employment Relationship**
 - Performance
 - Self-evaluation assessment tools
 - Confidentiality and non-disclosure agreements
 - Employee medical conditions and ADA considerations
- **Post-Employment**
 - Exit Interviews
 - Restrictive covenants
 - Severance agreement considerations
- **Best Practices and Pitfalls for the Unwary**

Faculty

Michelle M. De Oliveira, Esq., *Kenney & Sams, PC, Southborough*, Chair
Monica R. Shah, Esq., *Zalkind, Duncan & Bernstein LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, March 25, 2025
12:00 pm–2:00 pm
Program # 2250173WBC

REBROADCAST

Wednesday, April 9, 2025
9:00 am–11:00 am
Program # 2250173RB1

REBROADCAST

Thursday, April 17, 2025
2:00 pm–4:00 pm
Program # 2250173RB2

ON DEMAND WEBCAST

View after Thursday, April 17, 2025
Program # 2250173WBA

Tuition *(includes written materials)*

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Materials

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CLE Credits

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What Employers Can & Cannot Do to Discourage Unionization

Dissecting examples of conduct prohibited by the NLRA as well as conduct that is lawful

Navigating the “Dos and Don’ts” of the National Labor Relations Act (NLRA) can be tricky business for employer representatives and labor attorneys. Our panel shares an engaging discussion of examples of conduct that are prohibited by the Act as well as conduct that is lawful. Depending upon the facts and circumstances of each case, experienced practitioners may disagree. In the real world of private sector union organizing, it is not unusual for the union counsel to learn of alleged illegal activity well before the employer and their attorney. Quite often the difference between lawful and unlawful is a single word, or gesture . . .

Most labor law practitioners are familiar with the basic rules of organizing: no threats, interrogation, promises, solicitation of grievances, or “surveillance.” What about mandatory employee meetings where managers or outside speakers facilitate discussions about the pros and cons of unionization? Can an employee be required to attend such informational meetings against their will? Can an employee be disciplined for refusing to attend, or walking out of the meeting? Are employers allowed to prohibit union buttons, hats and or t-shirts? Is an employer allowed to prohibit employees from passing out pro-union leaflets in the workplace? Our experienced panelists cover all these questions and more during this new lively one-hour program.

Agenda

- Mandatory Meetings Regarding Unionization
- Statements Regarding Changed Relationship or Communications with Management Post-Unionization
- Statements and Changes Concerning Wages and Benefits
- Restrictions on Union-Related Attire or Insignias
- Restrictions on Union or Off-Duty Employee Access to the Employer’s Property
- Statements About Bullying or Harassment
- *Cemex* Bargaining Orders: New Consequences for Violations During Election Campaign
- “Ask the Experts” Q&A Session

Faculty

Jeffrey L. Hirsch, Esq., *Hirsch Roberts Weinstein LLP, Boston*, Chair
Tierra A. Jenkins, Esq., *Hirsch Roberts Weinstein LLP, Boston*
Gregory A. Robertson, Esq., *Pyle Rome Ehrenberg, PC, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, June 17, 2025
12:00 pm–1:00 pm
Program # 2250175WBC

REBROADCAST

Wednesday, July 2, 2025
3:00 pm–4:00 pm
Program # 2250175RB1

REBROADCAST

Thursday, July 10, 2025
9:00 am–10:00 am
Program # 2250175RB2

ON DEMAND WEBCAST

View after Thursday, July 10, 2025
Program # 2250175WBA

Tuition *(includes written materials)*

- \$145
- \$122.50 MCLE Members
- \$72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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Materials

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Workers' Compensation Law: MCLE BasicsPlus!®

Establish a solid foundation and strategy for success—from evaluation to litigation

This program provides a thorough introduction to workers' compensation practice. Experienced attorneys who concentrate in the field and judges who rule on these matters daily draw on their expertise to give you substantive explanations and practical advice on how to handle these cases. Emphasis is placed on evaluating and litigating workers' compensation claims. Establish a solid foundation and learn pointers and strategy from the expert panelists at MCLE.

Agenda

- Logistics of Remote Practice at the Department of Industrial Accidents
- Types of Benefits Under G.L. c. 152
- Representing the Claimant from Initial Intake to Conciliation
- Representing the Insurer in the Initial Stages of a Claim, Filing, or Litigation
- Conciliations
- Conferences
- Key Cases
- Hearings
- Social Media and Legal Ethics
- Deposing Impartial Examiners and Section 11A Practice
- Mediations, Lump Sum Settlements, and Liens
- "Ask the Experts" Q&A Session

Faculty

Ryan L. Benharris, Esq., *Law Offices of Deborah G. Kohl, Fall River, Cochair*
Teri A. McHugh, Esq., *Law Offices of Teri McHugh, PLLC, Needham, Cochair*
Alicia M. DelSignore, Esq., *DelSignore Law LLC, Watertown*
Hon. Omar Hernández, *Senior Judge, Department of Industrial Accidents, Commonwealth of Massachusetts*
Pauline A. Jauquet, Esq., *Law Office of Martin B. Schneider, Salem*
David Maille, Esq., *Eden Rafferty, Worcester*
Susan G. McDonald, Esq., *Pierce, Pierce & Napolitano, Salem*
Hon. Joseph M. Spinale, *Department of Industrial Accidents, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, April 8, 2025
9:30 am–3:30 pm
Program # 2250170WBC

REBROADCAST CC

Wednesday, April 23, 2025
9:30 am–3:30 pm
Program # 2250170RB1

REBROADCAST CC

Thursday, May 1, 2025
9:30 am–3:30 pm
Program # 2250170RB2

ON DEMAND WEBCAST CC

View after Thursday, May 1, 2025
Program # 2250170WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
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Materials

Workers' Compensation Practice in Massachusetts ebook, plus speaker materials

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26th Annual Estate Planning Conference 2025

Estate planning, trust administration and fiduciary litigation all in one Conference!

Join estate planning practitioners, fiduciary counsel, and fiduciary litigators as we celebrate this year's *26th Annual Estate Planning Conference 2025*! The *Conference* distills the key issues, new developments, court trends, and practice tips you need to know about for the upcoming year. We look forward to seeing you there!

Agenda

- **Estate Planning in a New Political Landscape—Yes, it's Still Essential:** The results of the 2024 election reduce the likelihood that the significant tax increases anticipated by estate planners will occur during the next four years. The panelists discuss why and how practitioners should continue to plan for wealthy clients in a low federal estate tax environment, keeping in mind that tax laws will continue to evolve with each future administration. Topics include the increased importance of income tax and charitable planning, and the continued relevance of certain wealth transfer techniques and strategies. The panelists also discuss potential future changes to the federal estate tax and offer practical suggestions in the face of uncertainty.
- **Directed Trusts—Drafting, Administration, and Jurisdictional Insights:** Directed trusts represent a rapidly growing segment of the trust industry, offering substantial flexibility and bifurcation of decision-making authority. The panelists provide practical insights into the drafting of directed trust agreements and address how fiduciaries can effectively manage the administration of these trusts while mitigating potential risks. They also provide a brief comparison of directed trust approaches in popular jurisdictions.
- **Updates, Answers, and Tips for Success from Inside the Probate and Family Court:** Members of the Probate and Family Court discuss new and ongoing developments within the court system and review various initiatives relevant to estate planning and administration lawyers and fiduciary litigators. The panel also answer audience questions about Probate Court processes, best practices, and tips for success (including any questions "for a friend").
- **Virtual Representation and GAL Appointments in Estate and Trust Administration and Litigation:** Faculty members examine emerging trends regarding the use of virtual representation in estate and trust administration and litigation, including analysis of the benefits and hidden risks associated with virtual representation. Panelists also discuss the use of GALs in lieu of or in addition to the use of virtual representation in transactional matters and disputes, including best practices when seeking the appointment of a GAL.

Faculty

Sarah Ryan Grandfield, Esq., *Fiduciary Trust Company, Boston*, Cochair
Marshall D. Senterfitt, Esq., *Holland & Knight, LLP, Boston*, Cochair
Tara E. DeCristofaro, Esq., *Register, Middlesex Probate and Family Court, Commonwealth of Massachusetts*
Annette K. Eaton, Esq., *The Northern Trust Company, Boston*
Cara Howe Santoro, Esq., *Holland & Knight LLP, Boston*
Megan C. Knox, Esq., *McDonald & Kanyuk, PLLC, Concord, NH*
Renat V. Lumpau, Esq., *Choate Hall & Stewart LLP, Boston*
Leiha Macauley, Esq., *Day Pitney LLP, Boston*
Evelyn J. Patsos, Esq., *Deputy Legal Counsel, Probate and Family Court, Commonwealth of Massachusetts*
Justin Rhuda, Esq., *Choate Hall & Stewart LLP, Boston*
Mark E. Swirbalus, Esq., *Holland & Knight LLP, Boston*

Dates & Locations

Register at www.mcle.org

BOSTON

Wednesday, April 16, 2025
9:30 am–4:30 pm
MCLE Conference Center
10 Winter Place, via Winter Street
Program # 2250195P01

LIVE WEBCAST

Wednesday, April 16, 2025
9:30 am–4:30 pm
Program # 2250195WBC

REBROADCAST CC

Thursday, May 1, 2025
9:30 am–4:30 pm
Program # 2250195RB1

REBROADCAST CC

Friday, May 9, 2025
9:30 am–4:30 pm
Program # 2250195RB2

ON DEMAND WEBCAST CC

View after Friday, May 9, 2025
Program # 2250195WBA

Tuition (includes written materials)

- \$275
- \$247.50 MCLE Members
- \$137.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Probate Law Sourcebook & Citor ebook, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for in-person registrants
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 6 CLE credits

Common Issues Encountered in Blended Family Estate Planning & Fiduciary Litigation

Emerging patterns of thorny estate planning and fiduciary litigation issues with the increasing number of blended families

This new program explores examples of common issues encountered in blended families, related case law, and estate planning practice tips and strategies to avoid or mitigate the issues. Take a deep dive with the expert panelists and improve your skill set.

Agenda

- **Life Estates in Real Estate and Qualified Terminable Interest Property Trusts, Where There Is a Surviving Second Spouse and a Remainderman Component Involving Children of a Prior Marriage:**
 - Neither the surviving second spouse nor the children of the prior marriage are happy because neither has 100% title and control and conflict can arise in terms of the types of expenses that are payable from the trust during the surviving second spouse's life. Accounting is also an issue, in terms of whether a trustee has a duty to account to remainder beneficiaries. *Schwalm v. Schwalm* addresses this accounting issue regarding a trust for the life of the surviving second spouse, with the remainder to children of a prior marriage.
- **Blended Family Estates Where the Decedent Did Not Leave a Will:**
 - Without a will, children of the prior marriage may take, which can give rise to conflict in a blended family estate administration. If there are no burial instructions in addition to no will, the surviving spouse has the authority to determine burial arrangements. This can cause turmoil between a surviving second spouse and children from a prior marriage.
- **The Spousal Elective Share and *Ciani v. McGrath*:**
 - This case empowered a surviving spouse of only 2 years to thwart the decedent's intent and disrupt decades of family property.
- **Failure to Change Beneficiary Designations in a Divorce:**
 - The MUPC revokes only those designations that are revocable.
- **"Ask the Experts" Q&A Session**

Faculty

Lisa M. Cukier, Esq., *Rubin and Rudman LLP, Boston*, Cochair

Jennifer L. Laucirica, Esq., *Rubin and Rudman LLP, Boston*, Cochair

Molly R. Soiffer, Esq., *Bove & Langa, PC, Boston*

Hon. Jennifer M. R. Ulwick, *Probate and Family Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, April 8, 2025

3:00 pm–5:00 pm

Program # 2250206WBC

REBROADCAST

Wednesday, April 23, 2025

9:00 am–11:00 am

Program # 2250206RB1

REBROADCAST

Thursday, May 1, 2025

2:00 pm–4:00 pm

Program # 2250206RB2

ON DEMAND WEBCAST

Thursday, May 1, 2025

Program # 2250206WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Learn more at www.mcle.org

Conveying Title from Trusts

Resolving common title problems involving trusts

Over the last 50 years, it has become increasingly common for real estate conveyancers and estate planning attorneys to have their clients take title to real property in trust or to put title to real property into trust, either by inter vivos conveyance or by a testamentary devise in the client's will. The forms of title holding trusts are not as uniform as they once were and the recording of trustee's certificates under G.L. c. 184, § 35 has become more common than recording the actual trust instruments. As a result, title problems frequently arise when the real property is being conveyed out of a trust, especially when the original trustees are deceased or have become incompetent and the trust has terminated. This program analyzes these common title problems, how they arise, and how they can be resolved in order to facilitate the conveyance of the trust's real property.

Agenda

- **Review of Basic Trust Concepts Relating to Identification and Appointment of the Trustees and the Power and Authority of Trustees to Sell, Mortgage, Convey, and Transfer Trust Property**
- **Overview of the More Common Forms of Title-Holding Trusts**
 - Including a discussion of the difference between inter vivos trusts and testamentary trusts and between “true trusts” and “nominee trusts”
- **Discussion of Important Trust Provisions to Look for Relating to Appointment and Succession of Trustees, Trustees' Powers, Amendment, Modification, and Termination**
- **When the Trust Lacks the Necessary Provisions to Deal with a Particular Trustee Succession or Power of Sale Issue**
 - What statutory rules under G.L. c. 203E (the Massachusetts Uniform Trust Code) and other statutes can help?
- **Review of the More Common (and Some Not So Common) Title Problems Relating to Conveying Title Out of a Trust and How to Resolve Them without Having to Resort to a Court Proceeding if Possible**
- **When All Else Fails: Remedies Available through the Courts**
 - What remedies are available through the Probate Court for such matters as appointing successor trustees, confirming appointment of successor trustees, authorizing a sale or transfer in cases where the trust lacks a sufficient power, or ratifying a doubtful act of a trustee who previously conveyed without the requisite authority?

Faculty

Ward P. Graham, Esq., *New England Underwriting Counsel, Westcor Land Title Insurance Company, Bedford, VA, Chair*

Scott J. Clifford, Esq., *Lipsey & Clifford, PC, Hanover*

Jennifer A. Maggiamo, Esq., *MUPC Magistrate/AJCM, Norfolk Probate and Family Court, Commonwealth of Massachusetts*



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Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, June 5, 2025

9:00 am–11:00 am

Program # 2250201WBC

REBROADCAST

Friday, June 20, 2025

12:00 pm–2:00 pm

Program # 2250201RB1

REBROADCAST

Monday, June 30, 2025

2:00 pm–4:00 pm

Program # 2250201RB2

ON DEMAND WEBCAST

View after Monday, June 30, 2025

Program # 2250201WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Real Estate Title Practice in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



Duties & Checklists for Conservatorship of Minors

When a conservatorship might be necessary, how to petition for a conservator, duties and requirements for a conservator, and how to manage requests and expectations of the minors and their families

Understanding conservatorship law as it relates to minors is important for estate planners, family law attorneys, and probate attorneys. Get an in-depth overview of conservatorships for minors. The faculty explain the basics, including when a conservatorship might be necessary, how to petition for a conservator, duties and requirements for a conservator, and how to manage requests and expectations of the minors and their families.

Agenda

- Appointment of Temporary and Permanent Conservators for Minors
- Limited Conservatorships
- Accounting and Reporting Requirements
- Single Transactions and Protective Arrangements and Estate Planning for Minors
- The Role of a Guardian ad Litem
- Alternatives to Conservatorships

Faculty

Melissa A. Howitt, Esq., *Doherty, Dugan, Cannon, Raymond, & Weil, PC, Franklin*, Chair
Stephanie Addeo, Esq., *Rubin and Rudman, LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, March 13, 2025
9:00 am–11:00 am
Program # 2250209WBC

REBROADCAST

Friday, March 28, 2025
12:00 pm–2:00 pm
Program # 2250209RB1

REBROADCAST

Monday, April 7, 2025
1:00 pm–3:00 pm
Program # 2250209RB2

ON DEMAND WEBCAST

View after Monday, April 7, 2025
Program # 2250209WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Guardianship and Conservatorship Practice in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Elder Law: MCLE BasicsPlus!

Two days of intensive training for advising older clients

This thorough two-day program provides the perfect introduction to the key concepts necessary to properly advise older clients on everything from estate planning to long-term care. Expert panelists cover topics on the substantive law relating to Medicaid eligibility, including updates on federal and state changes; planning for long-term incapacity; advising clients on making estate planning and extraordinary medical decisions on behalf of incapacitated individuals; responding to financial and physical elder abuse; and using supplemental needs trusts. You receive a step-by-step guide through the basic tools every elder law practitioner needs to know.

The program features many opportunities to have your specific questions answered directly by the faculty and case study sessions featuring real-life examples of issues unique to the elder law world. You also examine specific case studies in detail so that you see the practical implications of the law. Get the latest updates in this in-depth, two-day program—and be well-prepared to address your elder clients' complex, myriad needs.

Agenda

- Community Care Options for Your Elder Client
- Planning for Incapacity
- Nursing Home Residents' Rights and Medicaid
- Issues to Consider Regarding the House
- Long-Term Care Insurance
- Elder Abuse
- Medicaid and Irrevocable Trust Planning Strategies
- Elder Law Legislative and Policy Updates
- Guardianship and Substitute Decision Making
- Case Studies
- "Ask the Experts" Q&A Session

Faculty

Steven M. Cohen, Esq., *Rubin and Rudman LLP, Boston*, Cochair

Eric R. Oalican, Esq., *Oalican Law Group LLC, Raynham*, Cochair

Linda G. Bauer, Esq., *General Counsel and Executive Director, Massachusetts Board of Bar Overseers, Boston*

Rachel S. Brown, Esq., *Senior Supervising Attorney, Community Legal Aid, Worcester*

John J. Ford, Esq., *Northeast Justice Center, Lynn*

Nomita Ganguly, Esq., *Gregory & Associates, Boston*

Katherine Granigan, MSW, LICSW, C-ASWCM, *Chief Executive Officer, LifeCare Advocates, Newton*

Pamela B. Greenfield, Esq., *Birchgrove Law Collaborative LLC, Needham*

Timothy R. Loff, Esq., *Law Offices of Timothy R. Loff, Newton*

Matthew J. Marcus, Esq., *Colucci, Colucci, Marcus & Flavin, PC, Milton*

Patricia Keane Martin, Esq., *Prince Lobel Tye LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, March 24, &
Tuesday, March 25, 2025
9:30 am–4:30 pm
Program # 2250200WBC

REBROADCAST

Tuesday, April 8, &
Wednesday, April 9, 2025
9:30 am–4:30 pm
Program # 2250200RB1

REBROADCAST

Wednesday, April 16, &
Thursday, April 17, 2025
9:30 am–4:30 pm
Program # 2250200RB2

ON DEMAND WEBCAST

View after Thursday, April 17, 2025
Program # 2250200WBA

Tuition *(includes written materials)*

- \$275
- \$247.50 MCLE Members
- \$137.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Elder and Disability Law in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 12 CLE credits including up to 0.5 ethics credit



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Estate Administration Client Checklists

Navigating the estate administration process with the client experience in mind

Advising a client through the estate administration process requires a solid understanding of probate, tax, and trust laws, as well as empathy, attention-to-detail, and responsiveness. Sometimes the burden of the estate administration process can be eased with some strategic planning before death. Even the most thorough estate plans can, however, still have surprises that require an unanticipated probate proceeding.

When helping clients through the legal responsibilities that follow a loved one's death, estate planning attorneys are issue-spotting, advocating, and explaining. Internal and external checklists are essential to mitigate risk, to meet the demands of an estate administration practice, and to ensure the client's experience exceeds expectations. Using checklists and samples, this seminar provides practical advice to help estate planning attorneys navigate the estate administration process with the client experience in mind.

Agenda

- **Preparing for the First Meeting**
 - Internal Checklists: Presentation documents; Agenda
 - External Checklists: Engagement letter; Preliminary information request form
- **Mapping the Estate**
 - Internal Checklists: Information gathering; Internal tracking, assignment of tasks, and calendaring; Issue-spotting
 - External Checklists: Information gathering; Estate administration memo and meeting(s)
- **Keeping Updated**
 - Internal Checklists: Estate status reviews; Ongoing tracking probate, creditors, tax compliance, and implementation
 - External Checklists: Client-friendly status checklists and communications; Managing client involvement; Assisting client with implementation
- **Crossing the Finish Line**
 - Internal Checklists: Closing memo
 - External Checklists: Explanatory memo and meeting(s); Ongoing advice

Faculty

Jennifer A. Civitella Hilario, Esq., *JC Hilario, PC, Winchester*, Chair
Samantha B. Owens, Esq., *JC Hilario, PC, Winchester*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, March 6, 2025
9:30 am–10:30 am
Program # 2250202WBC

REBROADCAST

Friday, March 21, 2025
12:00 pm–1:00 pm
Program # 2250202RB1

REBROADCAST

Monday, March 31, 2025
2:00 pm–3:00 pm
Program # 2250202RB2

ON DEMAND WEBCAST

View after Monday, March 31, 2025
Program # 2250202WBA

Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Members
- \$72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Probate Manual ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1 CLE credit



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for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

Estate Planner's Guide to Planning for Children's & Grandchildren's Education

Learn about particular approaches to education funding, along with the advantages and disadvantages of each

Education can change the trajectory of a person's life, but education can be expensive. Proper planning can help make the associated costs more manageable. This seminar explores approaches to saving for education and discusses how to actually pay for the costs. Hear the faculty analyze the reasons particular approaches may be utilized, along with the advantages and disadvantages of each. Learn to properly counsel a variety of your clients on how to approach education funding in their particular situation.

Agenda

- **What Are Some of the Approaches in Saving for Future Education Costs?**
 - 529 Plans
 - Irrevocable trusts
 - UTMA accounts
 - Parental savings
- **How to Actually Pay for Education Costs**
 - Filing the FAFSA (Free Application for Federal Student Aid)
 - Completing school-specific financial aid forms (such as CSS Profile)
 - Grants
 - Scholarships (merit and needs-based)
 - Savings (including vehicles noted above)
 - Gifts (tuition versus other costs)
 - Types of loans (and how to pay them off)
 - Stipends for graduate school
 - Employment income
- **Family Conversations about Financial Impact of College Choices**
- **"Ask the Experts" Q&A Session**

Faculty

Jody R King, JD, CPA, AEP®, CDFA®, RLP®, *Director of Wealth Planning, Fiduciary Trust Company, Boston, Chair*

Bianca A. McLaughlin, *Vice President, Senior Financial Planner & Investment Officer, Fiduciary Trust Company, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, June 17, 2025

9:30 am–11:30 am

Program # 2250199WBC

REBROADCAST

Wednesday, July 2, 2025

12:30 pm–2:30 pm

Program # 2250199RB1

REBROADCAST

Thursday, July 10, 2025

2:00 pm–4:00 pm

Program # 2250199RB2

ON DEMAND WEBCAST

View after Thursday, July 10, 2025

Program # 2250199WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Estate Planning: MCLE BasicsPlus!®

Developing a plan for the intermediate estate

A successful estate planning practice requires knowledge of federal and state statutes, rulings, and case law on a variety of substantive areas including taxation, trust, will, and property law. You must also possess finely-tuned interview skills, as well as the ability to elicit and effectively use a substantial body of financial and personal data for each client.

This signature MCLE program gives you an overview of planning for a modest estate and the in-depth knowledge you need to plan for a variety of estate matters and effectively run your practice. The faculty focus on the practical application of the law and skills involved in planning an estate value of less than \$2,000,000, although concerns that arise in larger estates are also covered. You learn the impact of both the Massachusetts and the federal estate tax exemptions. You also get advice on preparing wills, trusts, health care proxies, and powers of attorney based on your client's financial situation.

Agenda

- Initial Steps, Fundamentals, and Estate Planning Documents
- Medicaid and Long-Term Care Planning
- Fiduciary Income Tax Planning
- Planning with Life Insurance
- Estate, Gift, and GST Tax Planning
- Business Succession Planning
- Post-Mortem Planning
- Charitable Planning
- Ethics Hypotheticals
- "Ask the Experts" Q&A Session

Faculty

Katherine M. Sheehan, J.D., AEP, *Managing Director, Wealth Strategist, Crestwood Advisors, Boston, Chair*

Patricia C. D'Agostino, Esq., *Margolis Bloom & D'Agostino, Wellesley*

Brian J. DesRosiers, Esq., *DesRosiers & Tierney LLC, Boston*

Kelly J. Guarino, Esq., *Vice President & Trust Counsel, Fiduciary Trust Company, Boston*

Amy R. Lonergan, Esq., *Day Pitney LLP, Boston*

Heidi A. Seely, Esq., *Day Pitney LLP, Boston*

James M. Tierney, Esq., CPA, LL.M., *DesRosiers & Tierney LLC, Duxbury*

Christopher A. Voukides, Esq., *Day Pitney LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, May 19, &
Tuesday, May 20, 2025
9:30 am–4:30 pm
Program # 2250197WBC

REBROADCAST

Tuesday, June 3, &
Wednesday, June 4, 2025
9:30 am–4:30 pm
Program # 2250197RB1

REBROADCAST

Wednesday, June 11, &
Thursday, June 12, 2025
9:30 am–4:30 pm
Program # 2250197RB2

ON DEMAND WEBCAST

View after Thursday, June 12, 2025
Program # 2250197WBA

Tuition *(includes written materials)*

- \$275
- \$247.50 MCLE Members
- \$137.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

A Practical Guide to Estate Planning in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 12 CLE credits
Including up to 1 ethics credit



Subscribe to the MCLE OnlinePass®
for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

How to Avoid Probate

Various methods for avoiding probate, and the potential pitfalls in different situations

As estate planners, many of our client meetings begin with this statement: “I need a will and I want to avoid probate.” The first thing we explain is that a will, although critical to a complete estate plan, does not “avoid probate.” While there are several ways to avoid probate, some are better than others, depending on the client’s personal and financial situation. A probate avoidance technique that works for a standard estate plan might be detrimental for a Medicaid plan. In this new program, we discuss the various methods for avoiding probate, and the potential pitfalls with some of them in different situations.

Agenda

- Jointly-Owned Property
- Beneficiary Designation Property, Including Transfer on Death and Payable on Death Designations
- Life Estates
- Revocable Trusts
- Irrevocable Trusts

Faculty

Jennifer Z. Flanagan, Esq., *Mirick, O’Connell, DeMallie & Lougee LLP, Worcester*, Chair
Elizabeth V. Newton, Esq., *Mirick, O’Connell, DeMallie & Lougee LLP, Worcester*
Stephen L. Sobey, Esq., *Shatz, Schwartz and Fentin, PC, Springfield*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, June 10, 2025
12:00 pm–2:00 pm
Program # 2250210WBC

REBROADCAST

Wednesday, June 25, 2025
11:00 am–1:00 pm
Program # 2250210RB1

REBROADCAST

Thursday, July 10, 2025
9:00 am–11:00 am
Program # 2250210RB2

ON DEMAND WEBCAST

View after Thursday, July 10, 2025
Program # 2250210WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Learn more at www.mcle.org

How to Structure Revocable Living Trusts

Understand the trust structure, language, and administration considerations that best suit life's changing scenarios

A revocable living trust is typically the central document of an estate plan, so being able to counsel clients as to the best structure for their specific circumstances is an important skill. Clients look to their attorney for guidance on how best to implement their wishes with respect to the disposition of their property without creating an administrative mess.

This program gives you the essential foundational knowledge and understanding that you need to effectively structure a revocable living trust for a variety of client scenarios. In addition to providing information on advising clients and drafting options, the experienced panelists examine revocable living trusts from a trust administration standpoint to flag what works and what doesn't work. Hone your craft at MCLE with expert guidance!

Agenda

- Overview of Massachusetts Estate Tax and Federal Estate, Gift, and GST Tax Laws
- Overview of Basic Trust Terminology
- Provisions While Grantor Is Living
- Structure for Surviving Spouse—Credit Shelter Trust and Marital Trust
- Structure for Children and More Remote Descendants—Creditor Protection Considerations
- Trustee Selection
- Trustee Guidance v. Distribution Limitations/Restrictions
- Retirement Benefit Provisions
- Miscellaneous Provisions Integral to Trust Administration
- Trust Funding
- “Ask the Experts” Q&A Session

Faculty

Pamela L. Halter, J.D., LL.M., *SCS Financial Services, Boston*, Chair

Dara Lynn S. Freytag, Esq., LL.M., *Tarlow, Breed, Hart & Rodgers, PC, Boston*

James W. Murphy, J.D., CFP®, AEP®, *Northeast Investment Management, Inc., Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, May 14, 2025

9:30 am–12:30 pm

Program # 2250196WBC

REBROADCAST

Thursday, May 29, 2025

12:00 pm–3:00 pm

Program # 2250196RB1

REBROADCAST

Friday, June 6, 2025

9:00 am–12:00 pm

Program # 2250196RB2

ON DEMAND WEBCAST

View after Friday, June 6, 2025

Program # 2250196WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



Subscribe to the MCLE OnlinePass®
for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

How to Terminate an Adult Guardianship or Conservatorship Based on Restoration of Rights

Explore circumstances, limitations, and alternatives

Individual autonomy and the least restrictive arrangement should be at the heart of guardianship and conservatorship proceedings. Attend this new webcast program to hear a discussion about options for restoring rights of individuals under guardianship and conservatorship. The panelists explore the circumstances in which termination of a guardianship or conservatorship should be considered. They also incorporate ideas for appropriate limitations on guardianship and considerations for supported decision-making, as well as thoughts on appropriate limitations for conservatorships and use of non-judicial tools to accomplish similar goals. The panelists offer insight about how to best approach these situations with families, and individuals under guardianship and conservatorship as well as with the court.

Agenda

- Circumstances in Which Termination of a Guardianship or Conservatorship Should Be Considered
- Options for Restoring Rights of Individuals Under Guardianship and Conservatorship
- Appropriate Limitations on Guardianship and Considerations for Supported Decision-Making
- Appropriate Limitations for Conservatorships and Use of Non-Judicial Tools to Accomplish Similar Goals
- “Ask the Experts” Q&A Session

Faculty

Marlee S.F. Cowan, Esq., *Rubin and Rudman LLP, Boston*, Cochair

Seth J. Urbanoski, Esq., *Hachey Urbanoski LLC, Boston*, Cochair

Debra Perrotta Dow, Esq., *Newburyport*

Barbara D. Jackins, Esq., *Legal Planning for Special Needs, Lexington*

Michelle M. Mulvena, Esq., *Mulvena Winston, PC, Stoneham*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Friday, March 21, 2025

9:30 am–11:30 am

Program # 2250205WBC

REBROADCAST

Monday, April 7, 2025

2:00 pm–4:00 pm

Program # 2250205RB1

REBROADCAST

Tuesday, April 15, 2025

12:00 pm–2:00 pm

Program # 2250205RB2

ON DEMAND WEBCAST

View after Tuesday, April 15, 2025

Program # 2250205WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Guardianship and Conservatorship Practice in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Learn more at www.mcle.org

Licenses to Sell Across Massachusetts Counties

Ensuring your real estate sale goes smoothly in estate administration

We all know there are different filing techniques for different Probate Courts. If you handle estate administration matters, learn the best techniques for filing your license to sell across the various county courts.

Agenda

- **Petition for License to Sell**
 - Essex County
 - Hampden County
 - Middlesex County
 - Norfolk County
 - Plymouth County
 - Suffolk County
 - Worcester County
- **Informal v. Formal Filing**
 - Registered land
 - Recorded Land
- **Pitfalls for the Unwary**

Faculty

Shani Rea Collymore, Esq., *Cody, Cody & McCarthy LLC, Quincy*, Chair
Karen B. Johnson, Esq., *Madge & Johnson, PC, Westford*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, July 17, 2025
9:30 am–11:30 am
Program # 2250208WBC

REBROADCAST

Friday, August 1, 2025
9:00 am–11:00 am
Program # 2250208RB1

REBROADCAST

Monday, August 11, 2025
12:00 pm–2:00 pm
Program # 2250208RB2

ON DEMAND WEBCAST

View after Monday, August 11, 2025
Program # 2250208WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
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Materials

- E-materials link emailed upon registration
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Nuances of Using Non-Judicial Settlement Agreements in Trust Administration

Uses and drawbacks of NJSAs in trust administration

A non-judicial settlement agreement (NJSA) is a binding agreement between the interested parties with respect to any matter involving a trust. NJSAs can be helpful in interpreting imprecise trust terms, modifying trust terms, appointing or removing a trustee, ascertaining how to distribute trust assets, or resolving disputes between beneficiaries and trustees. Although most trusts and estate attorneys are familiar with NJSAs by now, they are still relatively new in terms of frequency and nuances. The faculty guide you through these nuances, including a discussion of the pros and cons of NJSAs.

Agenda

- Massachusetts Uniform Trust Code (MUTC) Law as to NJSAs
- Strategic Use of NJSAs to Protect Fiduciaries
- Strategic Use of NJSAs to Settle Litigation
- Sample Language and Key Terms in NJSAs
- NJSAs with Charitable Interests
- Nuances in NJSA Use
- Potential Challenges to a NJSA
- “Ask the Experts” Q&A Session

Faculty

Lisa M. Cukier, Esq., *Rubin and Rudman LLP, Boston*, Cochair

Jennifer Laucirica, Esq., *Rubin and Rudman LLP, Boston*, Cochair

Jennifer Locke, Esq., *Goodwin Procter LLP, Washington, DC*

Patricia M. Shumaker, Esq., *Conn Kavanaugh Rosenthal Peisch & Ford LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, June 3, 2025

3:00 pm–5:00 pm

Program # 2250294WBC

REBROADCAST

Wednesday, June 18, 2025

9:00 am–11:00 am

Program # 2250294RB1

REBROADCAST

Thursday, June 26, 2025

12:00 pm–2:00 pm

Program # 2250294RB2

ON DEMAND WEBCAST

View after Thursday, June 26, 2025

Program # 2250294WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
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Probate Practice: MCLE BasicsPlus!®

Comprehensive guide for administering an estate

The complex rules of the Massachusetts Uniform Probate Code (MUPC) and the Massachusetts Uniform Trust Code (MUTC) make it essential for practitioners to fully understand the ins and outs of the law and procedure. This *comprehensive two-day review* gives you a strong foundation in the complete administration of an estate. Trust and estate experts discuss key provisions of the MUPC and the MUTC and offer essential tips and key techniques. Learn about the entire estate administration process, from pre-probate considerations to allowance of the final account, with special emphasis on handling the modest estate. Hear expert advice on trust related issues. Get valuable forms, checklists, and pointers, as well as the chance to have all your questions answered. Be ready for your next probate client!

Agenda

- Chronology of Estate Administration: Preliminary Matters; Managing Client Relationship/Educating the Personal Representative; Checklist Probate Manual
- Options to Open an Estate; Will Contests and Other Objections
- Collection and Management of the Estate; Sale of Real Estate; Debts and Creditor Claims
- Spousal Elective Share
- Taxation of the Estate
- Post-Mortem Planning
- Trusts—Testamentary and Interplay Between Trusts and Estates
- Final Distribution of the Estate; Options to Close; Probate Accounts
- Probate Litigation
- Digital Assets and Estate Administration
- “Ask the Experts” Q&A Session

Faculty

Evelyn J. Patsos, Esq., *Deputy Legal Counsel, Probate and Family Court, Commonwealth of Massachusetts*, Cochair; Mary H. Schmidt, Esq., *Verrill Dana LLP, Boston*, Cochair; Julie E. Braverman-Bruno, Esq., *Verrill Dana LLP, Boston*; Darian M. Butcher, Esq., *Butcher Law LLC, Boston*; Pamela Casey-O'Brien, *Register of Probate, Essex Probate and Family Court, Commonwealth of Massachusetts*; Hon. Edward F. Donnelly, Jr., *Probate and Family Court, Commonwealth of Massachusetts (Ret.)*; Kristin N.G. Dzialo, Esq., *Rubin and Rudman LLP, Boston*; Jennifer Z. Flanagan, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester*; Jennifer T. Fleming, Esq., *Prince Lobel Tye LLP, Boston*; Katelyn M. Lynch, Esq., *Assistant Register, Essex Probate and Family Court, Commonwealth of Massachusetts*; Ryan P. McManus, Esq., *Hemenway & Barnes LLP, Boston*; Catherine Olender Neijstrom, Esq., *Gilmore, Rees & Carlson, PC, Wellesley*; Heather Reid, Esq., *Squillace & Associates, PC, Boston*; Lisa M. Rico, Esq., *Rico, Murphy, Diamond & Bean LLP, Natick*; Marshall D. Senterfitt, Esq., *Holland & Knight LLP, Boston*; Ryan J. Swartz, Esq., *McLane Middleton, Woburn*; Karen L. Witherell, Esq., *Bove & Langa, PC, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, May 13, &
Wednesday, May 14, 2025
9:30 am–4:30 pm
Program # 2250203WBC

REBROADCAST

Wednesday, May 28, &
Thursday, May 29, 2025
9:30 am–4:30 pm
Program # 2250203RB1

REBROADCAST

Thursday, June 5 &
Friday, June 6, 2025
9:30 am–4:30 pm
Program # 2250203RB2

ON DEMAND WEBCAST

View after Friday, June 6, 2025
Program # 2250203WBA

Tuition *(includes written materials)*

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Materials

Massachusetts Probate Manual ebook, plus speaker materials

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Strategies for Fixing Dysfunctional Trusts

Reasons, methods, and drafting tips for modifying irrevocable trusts

Irrevocable trusts are a common estate planning tool for transferring wealth to future generations while reducing transfer taxes. In exchange, the grantor of an irrevocable trust must give up the ability to amend or revoke the trust. However, despite their name, irrevocable trusts can still be modified in many ways, particularly when they are no longer working as effectively as they should. This panel discusses potential reasons to modify a trust, such as fixing a scrivener's error or ambiguity, reflecting changes in the law, or addressing unforeseen beneficiary circumstances. The speakers also review the multitude of judicial and non-judicial methods for modifying an irrevocable trust's terms or altering important aspects of the trust's administration, as well as drafting considerations to head off potential issues in advance.

Agenda

- **Reasons to Modify an Irrevocable Trust**
 - Change in circumstances
 - Tax benefits
 - Administrative changes
 - Asset protection benefits
- **Drafting Flexibility into Trusts**
 - Trustee powers
 - Powers of appointment
 - Trustee succession
 - Trust protector
- **Methods to Modify Irrevocable Trusts**
 - Judicial proceedings
 - Non-Judicial proceedings

Faculty

Aimee Fukuchi Bryant, Esq., *Fiduciary Trust Company, Boston*, Cochair
Nikki Marie Sherwood, Esq., *Nutter McClennen & Fish LLP, Boston*, Cochair
Paul Cathcart, Jr., Esq., *Hemenway & Barnes LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, August 19, 2025
12:00 pm–2:00 pm
Program # 2250198WBC

REBROADCAST

Wednesday, September 3, 2025
9:00 am–11:00 am
Program # 2250198RB1

REBROADCAST

Thursday, September 11, 2025
2:00 pm–4:00 pm
Program # 2250198RB2

ON DEMAND WEBCAST

View after Thursday, September 11, 2025
Program # 2250198WBA

Tuition *(includes written materials)*

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Undue Influence Prevention & Detection

Understand—from the perspective of the fiduciary, litigators, and a forensic neuropsychiatrist—how to identify risk and protective factors for vulnerability to undue influence

The faculty explore what substance, mindset, and setting factors predispose clients to undue influence. Substance factors may include the substance and complexity of the transactions in question. Mindset factors may include data from medical history, medications, social history, degree of impairment of residual capacities, and resilience. Setting factors may include data from living situations ranging from isolated to independent to total care, and dependence on potential influencers who stand to profit from the transactions.

Relative to identifying potential undue influencers, learn about traits such as dependency, entitlement, domination, sanctimoniousness, grandiosity, and patterns of antisocial behavior. We consider how to gather corroborative data of such traits and behaviors; when to intervene to preempt and, when needed, to proceed in the process of restorative justice via a forensic neuropsychiatric evaluation, discovery, deposition, and trial.

Agenda

- Statutory Financial Exploitation Legal Authority
- Common Law Undue Influence Legal Authority
- Coercive Control
- Standards of Mental Capacity for Various Tasks and Execution of Instruments
- Discovery Strategies for Identifying Undue Influence Profiles
- Profile of Alleged Influencer and the Alleged Victim
- Clinical and Forensic Psychiatric Evaluation Methodologies
- The Treating Physician Dual Agency Problem; Why a Forensic Neuropsychiatric Evaluation
- “Ask the Experts” Q&A Session

Faculty

Lisa M. Cukier, Esq., *Rubin and Rudman LLP, Boston, Cochair*

Jennifer Laucirica, Esq., *Rubin and Rudman LLP, Boston, Cochair*

Harold J. Bursztajn, M.D., *Associate Professor of Psychiatry, Harvard Medical School; Co-founder, Program in Psychiatry and the Law, BIDMC Psychiatry of Harvard Medical School, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, March 11, 2025

3:00 pm–5:00 pm

Program # 2250207WBC

REBROADCAST

Wednesday, March 26, 2025

9:00 am–11:00 am

Program # 2250207RB1

REBROADCAST

Thursday, April 3, 2025

12:00 pm–2:00 pm

Program # 2250207RB2

ON DEMAND WEBCAST

View after Thursday, April 3, 2025

Program # 2250207WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
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Materials

- E-materials link emailed upon registration
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CLE Credits

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Voluntary Administration in Probate Court

Get practical ideas for completing the voluntary administration petition successfully and learn how to avoid traps

The voluntary administration process has existed since before the adoption of the Massachusetts Uniform Probate Code. When Massachusetts adopted its version of the Uniform Probate Code, it decided to keep this process in place. Until 2023, these differing processes co-existed without much intersection. Then came the *Slavin* case and what was once a simple process suddenly got more complex.

Hear the faculty explain the original purpose of the voluntary administration process and how it fits into the other Probate Court processes for administering a decedent's estate. Hear how the Probate Court is reacting to the Supreme Judicial Court's decision in *Slavin* and what that means for you if you plan on filing a voluntary administration case. Get practical ideas for completing the voluntary administration petition successfully and learn how to avoid traps that make the voluntary administration more effort than it is worth.

Agenda

- Purpose and Proper Use of the Voluntary Administration Process
- Limitations of the Voluntary Administration Process
- *Marco v. Green*, 415 Mass. 732 (1993)
- Probate Court's Interpretation of the Voluntary Administration Process Before *Slavin*
- Review of the Supreme Judicial Court Decision, *In the Matter of the Estate of Patricia Ann Slavin*, 492 Mass. 551 (2023)
- How *Slavin* Changed the Probate Court's Role in the Voluntary Administration Process
- After *Slavin* What to Expect from the Probate Court's Review of the Voluntary Administration Statement
- Review of G.L. c. 190B, § 3-1201
- Alternatives to Filing a Voluntary Administration Statement
- Tips and Traps for the Unwary in Using Voluntary Administration Statements

Faculty

Karen B. Johnson, Esq., LL.M., *Madge & Johnson, PC, Westford*

Vincent Procopio, *Assistant Deputy Court Administrator, Probate and Family Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, June 18, 2025

12:00 pm–1:00 pm

Program # 2250204WBC

REBROADCAST

Thursday, July 10, 2025

2:00 pm–3:00 pm

Program # 2250204RB1

REBROADCAST

Friday, July 18, 2025

9:00 am–10:00 am

Program # 2250204RB2

ON DEMAND WEBCAST

View after Friday, July 18, 2025

Program # 2250204WBA

Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Members
- \$72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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Materials

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IN PERSON & ONLINE CONFERENCE

28th Annual Family Law Conference 2025

Learning, networking, socializing

MCLE is pleased to present its twenty-eighth annual comprehensive *Conference* developed exclusively for family law practitioners! This year's *Family Law Conference*, featuring leading practitioners, experts, and judges, examines a number of sophisticated issues and provides timely, practical information for all levels of practice. *Conference* highlights include sessions on ARC Counsel, executive compensation, and implicit bias.

Additional *Conference* features are the annual caselaw review, a fireside chat on the state of the Probate and Family Court with Chief Justice John D. Casey, discussions on prenups and postnups, implicit bias, and a look at how AI does and doesn't fit in your family law practice. In-person attendees receive a complimentary print copy of the *Massachusetts Family Law Sourcebook & Citator 2025* included with their tuition.

Agenda

- State of the Court with Chief Justice John D. Casey
- Caselaw Update
- ARC Counsel/Lawyers as GAL
- Executive Compensation
- Prenups and Postnups
- Implicit Bias
- When Generative AI Fits, and Doesn't Fit, in Your Practice

Faculty

Jennifer Sevigney Durand, Esq., *Durand Family Law LLC, Canton, Cochair*; Steven E. Gurdin, Esq., *Fitch Law Partners LLP, Boston, Cochair*; Carlos A. Maycotte, Esq., *Fitch Law Partners LLP, Boston, Cochair*; Barbara Zicht Richmond, Esq., *HealyFiske LLP, Waltham, Cochair*; Hon. Thomas J. Barbar, *Associate Justice, Probate and Family, Commonwealth of Massachusetts*; Hon. John D. Casey, *Chief Justice, Probate and Family Court, Commonwealth of Massachusetts*; Jared D. Correia, Esq., *Founder & CEO, Red Cave Law Firm Consulting, Beverly*; Jonathan E. Fields, Esq., *Fields and Dennis LLP, Wellesley*; Calvin J. Heinle, Esq., *Gibbs Heinle Maiona LLP, Wellesley Hills*; Peter J. Jamieson, Esq., *Hastings, Jamieson & Lipschutz Family Law Group LLP, North Andover*; Alexander D. Jones, Esq., *Brick, Jones, McBrien & Hickey LLP, Needham*; Louise Leduc Kennedy, Esq., *West Hill Technology Counsel, Inc., Beverly*; Dr. Robert T. Kinscherff, Esq., *William James College, Newton Center*; Rosanne P. Klovee, Esq., *Law Office of Rosanne Klovee LLC, Stoneham*; Heather L. LaVigne, Esq., *Assistant Bar Counsel, Office of Bar Counsel, Massachusetts Board of Bar Overseers*; Hon. Lee M. Peterson, *Associate Justice, Probate and Family Court, Commonwealth of Massachusetts*; Thomas D. Ritter, Esq., *Atwood & Cherny, PC, Boston*; Robert J. Rivers, Jr., Esq., *Lee & Rivers LLP, Boston*; Ingrid C. Schroffner, Esq., *UMass Chan Medical School, Worcester*; Megan Sheehan, Esq., *Sheehan & Associates Law, Barrington, RI*; Gary O. Todd, Esq., *Todd & Weld LLP, Boston*; Kimberley A. Train CPA/ABV, PKF, *O'Connor Davies, Boston*

Dates & Locations

Register at www.mcle.org

BOSTON

Thursday, May 1, 2025
9:30 am–4:30 pm
MCLE Conference Center
10 Winter Place, via Winter Street
Program # 2250272P01

LIVE WEBCAST

Thursday, May 1, 2025
9:30 am–4:30 pm
Program # 2250272WBC

REBROADCAST

Friday, May 16, 2025
9:30 am–4:30 pm
Program # 2250272RB1

REBROADCAST

Tuesday, May 27, 2025
9:30 am–4:30 pm
Program # 2250272RB2

ON DEMAND WEBCAST

View after Tuesday, May 27, 2025
Program # 2250272WBA

Tuition *(includes written materials)*

- \$275
- \$247.50 MCLE Members
- \$137.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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Materials

Massachusetts Family Law Sourcebook & Citator ebook, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for in-person registrants
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Adoption & Assisted Reproductive Technology Law 2025

Helping clients build families in Massachusetts

Adoption and assisted reproductive technology (ART) are wonderful ways to build a family, but each path requires legal counsel. In order to help clients, you must be able to advise them about the ins and outs of adoption and counsel them to make wise decisions through the ART process. If you are interested in expanding your practice, this is the program for you!

This program discusses how to ensure that a child is legally free for adoption, what kinds of adoption are available, and determining what is best for your clients. The expert faculty reviews what you need to know about the Indian Child Welfare Act (ICWA) and the Interstate Compact for the Placement of Children (ICPC), as well as how to draft open adoption agreements and ensure their enforceability. The program also explores the world of assisted reproductive technology law including egg donation, gestational surrogacy, and parentage issues. The panel also discusses the effect of the new Massachusetts Parentage Act. The panel covers the basics, provides you with the information you need to avoid the pitfalls, and answers your questions

Agenda

- Overview of the Adoption Process and Types of Adoption
- ICWA and ICPC
- Open Adoption Agreements
- Working with Gestational Carriers and Egg Donors
- Do Married Same-Sex Parents Need to Complete Co-Parent Adoptions?
- Developments in ART law
- Tips for Novices
- Massachusetts Parentage Act
- “Ask the Experts” Q&A Session

Faculty

Lisa J. Marino, Esq., *Wilson, Marino & Bonnevie, PC, Newton*, Chair
Catherine A. Cappelli, Esq., *Law Office of Catherine A. Cappelli, Newton Upper Falls*
Kathleen A. DeLisle, Esq., *Nichols, DeLisle & Lightholder, PC, Westborough*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, March 12, 2025
9:30 am–12:30 pm
Program # 2250280WBC

REBROADCAST

Thursday, March 27, 2025
2:00 pm–5:00 pm
Program # 2250280RB1

REBROADCAST

Friday, April 4, 2025
9:30 am–12:30 pm
Program # 2250280RB2

ON DEMAND WEBCAST

View after Friday, April 4, 2025
Program # 2250280WBA

Tuition *(includes written materials)*

- \$225
- \$202.50 MCLE Members
- \$112.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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Materials

Adoption and Reproductive Technology Law in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

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Divorce Law: MCLE BasicsPlus!®

Take control of your divorce practice!

If you want to launch a successful divorce practice, here's your chance. In this popular BasicsPlus!® program, the best divorce counsel in Massachusetts provide hands-on workshops, demonstrations, interactive dialogue, and information-packed lectures—all designed to teach you the fundamental skills critical to representing your clients. This two-day immersion features hours of essential training; get your questions answered!

Begin with a fast-moving presentation of core concepts, statutory authority, significant cases, and a review of procedural rules you need to know to navigate divorce litigation. Then it's time for live demos on conducting client interviews, preparing financial statements, arguing motions before a judge, and negotiating and settling the terms of separation agreements to obtain the very best outcome for your client. Your takeaways from this extraordinary two-day experience? New procedural and strategic knowledge, deepened understanding of the law of divorce, and a fresh confidence to jumpstart your career as a divorce lawyer

You will learn...

- How to establish and maintain a solid working relationship with your client
- What it takes to make your practice impeccably professional, civil, and ethical
- How to conduct an exhaustive intake and critically assess your client's end game and chances for success
- How to negotiate the most advantageous custody and visitation arrangement for your client
- What tax consequences to anticipate in the division of assets, and how to know when to call in an expert

Special interactive sessions

- Fee Arrangements, Jurisdiction and Venue Issues, Effective, Economical Case Management, Client Billing and How to Collect Your Fees
- The Financial Statement, The Mandatory Disclosure of Documents, Asset-Related Restraining Orders to Protect Your Client's Financial Wellbeing
- Getting Your Client Relief with Temporary Orders, Gleaning Facts Through Well-Conducted Depositions, Interacting Successfully the Probate and Family Court's Probation Officers
- Negotiating Optimal Settlements and Managing Clients and Opposing Counsel in Four-Way Conferences, Working Ethically and Productively with the Pro-Se Opponent

Faculty

Steven E. Gurdin, Esq., *Fitch Law Partners LLP, Boston, Cochair*

Kelly A. Schwartz, Esq., *Fitch Law Partners LLP, Boston, Cochair*

Richard C. Abati, Esq., *Acting Bar Counsel, Office of Bar Counsel, Massachusetts Board of Bar Overseers*

Steven E. Maalouf, Esq., *Casner & Edwards LLP, Boston*

Hon. James V. Menno, *Massachusetts Probate and Family Court (Ret.)*

Patrice O'Brien, *Chief Probation Officer, Essex Probate and Family Court, Commonwealth of Massachusetts*



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Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, March 6 &
Friday, March 7, 2025
9:30 am–4:30 pm
Program # 2250281WBC

REBROADCAST CC

Monday, March 24 &
Tuesday, March 25, 2025
9:30 am–4:30 pm
Program # 2250281RB1

REBROADCAST CC

Tuesday, April 1, 2025 &
Wednesday, April 2, 2025
9:30 am–4:30 pm
Program # 2250281RB2

ON DEMAND WEBCAST CC

View after Wednesday, April 2, 2025
Program # 2250281WBA

Tuition *(includes written materials)*

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Materials

Massachusetts Divorce Law Practice Manual ebook, plus speaker materials

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- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 12 CLE credits

Drafting & Litigating Prenups and Postnups

How you can choose the playing field

Negotiating and drafting agreements play a significant role in any domestic relations practice. Family Court practitioners are often tasked with the significant undertaking of drafting pre-nuptial and post-nuptial agreements for their clients. In many instances, the existence of a pre-nuptial or post-nuptial agreement dictates the litigation and ultimate resolution of a divorce case.

The art of skillfully negotiating a pre-nuptial or post-nuptial agreement for a client involves not only thorough knowledge of the law, but also a strong attorney-client relationship and an amicable relationship with the opposing counsel. The seminar begins with an overview of pre-nuptial and post-nuptial agreements, the tax considerations involved in drafting pre-nuptial and post nuptial agreements, and factors to consider in addressing future inheritance and interests in trust.

The faculty then discuss what considerations an attorney should undertake when drafting pre-nuptial and post-nuptial agreements for their clients. What documents must an attorney have a thorough command of prior to entering into a negotiation for an agreement? What are the tax considerations to be aware of as one negotiates these agreements? How can an attorney prepare a client for the inevitable compromise(s) required to reach an agreement? What dynamics occur when clients are present (either virtually or in person) in real time as a negotiation unfolds? What must an attorney consider when faced with the prospect of litigating a pre-nuptial or post-nuptial agreement in a divorce proceeding? What is the most important case law to know with respect to pre-nuptial and post-nuptial agreements? This program is a must-attend for attorneys who practice in domestic relations law in either a collaborative law or litigation setting.

Agenda

- Overview of Pre-Nuptial and Post-Nuptial Agreements
- Questions to Consider When Negotiating Pre-Nuptial and Post-Nuptial Agreements
- Tax Considerations of Pre-Nuptial and Post-Nuptial Agreements
- Documents Necessary from Your Client and the Opposing Party Prior to Commencing Negotiation
- Tactics for Conducting Pre-Negotiation Client Meetings, Tips for Drafting Agreements, and Negotiation Strategies
- Inheritance, Trusts, and Marital Property
- "Ask the Experts" Q&A Session

Faculty

Jennifer C. Roman, Esq., *Tracey, Roman & Ramos, PC, Wellesley Hills*, Chair

Melissa A. Howitt, Esq., *Doherty, Dugan, Cannon, Raymond & Weil, PC, Franklin*

Claire C. Tutwiler, Esq., *D'Amico Tutwiler, PC, Wellesley Hills*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, April 3, 2025

1:00 pm–5:00 pm

Program # 2250277WBC

REBROADCAST

Friday, April 18, 2025

10:00 am–2:00 pm

Program # 2250277RB1

REBROADCAST

Monday, April 28, 2025

12:00 pm–4:00 pm

Program # 2250277RB2

ON DEMAND WEBCAST

View after Monday, April 28, 2025

Program # 2250277WBA

Tuition *(includes written materials)*

- \$225
- \$202.50 MCLE Members
- \$112.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 4 CLE credits



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Evidence Admissibility in Family Law

Offering or opposing the introduction of evidence

Family law is evolving and so is the evidence available for trial. What evidence is allowed in and how do you get it in? What is hearsay and what are the exceptions? What privileges have exceptions and when can they be waived?

This seminar provides both new and experienced practitioners with real-life examples and suggestions to demystify the Probate and Family Court and the effective use of evidence at trial. With a panel of experienced practitioners, this seminar gives you insight into how evidence can be used effectively at trial. In addition, the panelists discuss their experience in what works and, perhaps most importantly, what does not work. The seminar also touches on the latest issues in the introduction of real and demonstrative evidence as well as the latest in electronic discovery.

Agenda

- GAL Reports as Evidence
- Therapy Records in Custody Cases
- Business Valuers v. Accountants as Witnesses
- Pension Valuator v. Pension Company: What is the Difference?
- Self Employment Income: How to Document It and How to Attack It
- “Ask the Experts” Q&A Session

Faculty

Julie K. Murphy, Esq., *Rico, Murphy, Diamond & Bean LLP, Natick, Chair*
Laurel Barraco, Esq., *Callahan, Barraco, Inman & Bonzagni, Westborough*
Hon. Mary Rudolph Black, *Probate and Family Court, Commonwealth of Massachusetts*
Jason V. Owens, Esq., *Lynch & Owens, PC, Hingham*
Robert E. Withrow, Esq., *Muhall Withrow, PLLC, Medfield*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, March 18, 2025
2:00 pm–5:00 pm
Program # 2250275WBC

REBROADCAST

Wednesday, April 2, 2025
9:30 am–12:30 pm
Program # 2250275RB1

REBROADCAST

Thursday, April 10, 2025
2:00 pm–5:00 pm
Program # 2250275RB2

ON DEMAND WEBCAST

View after Thursday, April 10, 2024
Program # 2250275WBA

Tuition *(includes written materials)*

- \$225
- \$202.50 MCLE Members
- \$112.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Guide to Evidence ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



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Family Court Judicial Forum 2025

Insight into judicial thinking and discretion

Be Better Prepared for Your Next Trip to Court

Judicial decision-making is the complex result of many influences and factors. That's why it is often a mystery to a lawyer what happens between "I'll take it under advisement," and the issuance of the opinion. Have you ever asked yourself, "What is the judge thinking about this case?" Then you need this *Forum* to find out. Hear the Probate and Family Court judges speak out on recent developments and legal issues that impact their decisions every day.

Gain Insight into Issues Critical to Your Clients

Through hypotheticals and questions posed by expert practitioners, the judges address a series of issues important to your clients and your practice, such as:

- What are the parameters of a property division?
- Will certain assets be excluded or included in the division?
- Will there be any alimony obligation, and, if so, how will it be calculated?
- How will gifted and inherited assets be treated?
- How does the issuance of a restraining order affect a custody determination?
- What about child support obligations, children's education, and extraordinary expenses?
- What are the parameters for removing a child from the Commonwealth?
- How does removal affect support?
- To what extent are pre-nuptial agreements enforceable?

The *Family Court Judicial Forum* is a unique opportunity for you to take stock of your legal strategies in light of the very latest legal developments. Don't miss this opportunity to hear from the court!

Faculty

Steven E. Gurdin, Esq., *Fitch Law Partners LLP, Boston, Chair*
Hon. Megan English Braga, *Probate and Family Court, Commonwealth of Massachusetts*
Hon. Elizabeth Teixeira, *Probate and Family Court, Commonwealth of Massachusetts*
Hon. Michelle A. Yee, *Probate and Family Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, May 6, 2025
4:00 pm–7:00 pm
Program # 2250273WBC

REBROADCAST

Wednesday, May 21, 2025
9:30 am–12:30 pm
Program # 2250273RB1

REBROADCAST

Thursday, May 29, 2024
2:00 pm–5:00 pm
Program # 2250273RB2

ON DEMAND WEBCAST

View after Thursday, May 29, 2024
Program # 2250273WBA

Tuition *(includes written materials)*

- \$195
- \$175.50 MCLE Members
- \$97.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Family Law Sourcebook & Citator ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



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Learn more at www.mcle.org

Family Law Trial Advocacy Workshop 2025

Five days—one trial—countless trial skills learned

“An amazing array of judges and very experienced lawyers providing the benefits of their wisdom and knowledge.”

This intensely challenging course gets you “on your feet” under the rigorous scrutiny of judges and leading practitioners. Join the scores of divorce lawyers who have polished their courtroom efficacy in this *Workshop’s* supportive environment, learning trial advocacy from motion practice—to expert witness examination—to final argument. You won’t find another training experience quite like this one. In each class session, you perform as trial counsel in phases of an ongoing trial. Day 1 begins with admitting exhibits and demonstrative evidence. By Day 4, you’re examining actual real estate and psychological experts.

Throughout the week, you observe expert domestic relations practitioners demonstrate effective trial techniques. Between “courtroom” performances, the faculty lectures on family law trial topics. On the final day of this intensive experience, you’re the leading counsel in a full-blown divorce trial. All the skills you learned during the week are on display before a Probate and Family Court judge, who concludes the workshop with a frank, no-holds-barred critique of your trial performance and newly-found advocacy skills.

Open to lawyers only, this program gives you a newfound confidence in yourself.

Faculty

Hon. Mary Rudolph Black, *Probate and Family Court, Commonwealth of Massachusetts*, Cochair

Hon. David G. Sacks, *ADR Provider / Retired Judge, Holyoke*, Cochair

Nicole C. Armstrong, Esq., *Armstrong Law, PC, Lowell*

James L. Brick, Esq., *Brick, Jones, McBrien & Hickey LLP, Newton*

Merril S. Chin, Esq., *The Law Office of Merrill S. Chin LLC, Danvers*

Phyllis E. Federico, Esq., *Warner, Federico & Ryan LLP, Boston*

Hon. Mikalen Howe, *Probate and Family Court, Commonwealth of Massachusetts*

Regina M. Hurley, Esq., *Verrill Dana LLP, Boston*

Martin F. Kane, II, Esq., *McGrath & Kane, Boston*

Margery L. Kennard, Esq., *Community Legal Aid/Hampden County, Springfield*

Lisa J. Marino, Esq., *Wilson, Marino & Bonnevie, PC, Newton*

Kelly Imbriano, *Probation Officer, Essex Probate and Family Court, Commonwealth of Massachusetts*

Angela M. LeBlanc Murdock, Esq., *Murdock & Associates, Gloucester*

Julie K. Murphy, Esq., *Rico, Murphy, Diamond & Bean LLP, Natick*

Linda A. Ouellette, Esq., *Ouellette Family Law LLC, Framingham*

Christina Paradiso, Esq., *Supervising Attorney, Community Legal Aid, Worcester*

Nicole Robinson, *Robinson and Associates Therapeutic Services, Stoneham*

Steven J. Ryan, Esq., *Warner, Federico & Ryan LLP, Boston*

Karen Watts Stuntz, Esq., *McEvoy & Stuntz, PC, Concord*

Gary O. Todd, Esq., *Todd & Weld LLP, Boston*

Amanda Vanderhorst, Esq., *Kates & Barlow, PC, Boston*

Andrea M. Wells, Esq., *Turco Legal, Newburyport*

Dates & Location

Register at www.mcle.org

BOSTON

Monday, June 9, 2025

through Friday, June 13, 2025

9:10 am–5:00 pm

MCLE Conference Center

10 Winter Place, via Winter Street

Program # 2250270P01

Tuition *(includes written materials)*

- \$1,495
- \$1,345.50 MCLE Members
- \$1,121.25 New Lawyers admitted to law practice within 5 years and Pending Admittees

This limited-enrollment program is not included in the MCLE OnlinePass.

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

The materials for this program include MCLE's *Massachusetts Courtroom Advocacy*, as well as a faculty-prepared program book of *Workshop* materials, including case files and motions, and a handout of exercises and directions, distributed approximately one week prior to the *Workshop* so you have time to prepare.

Registration notes

Space is limited and is available on a first come, first served basis. Cancellations are subject to a \$100 processing fee.

CLE Credits

Earn up to 30 CLE credits

Family Trusts & Life Insurance in a Divorce

Consideration of trust interests in determining support and property division, and the use of life insurance both inside and outside of trust to provide appropriate security post-divorce

To what extent is a trust vulnerable to or immune from attack in divorce? Trusts present unique challenges when dividing marital assets in a divorce and may also be a factor in determining support. Some trusts are considered marital property subject to division, while others are protected from division but may still impact the court's overall financial analysis. The case law on this topic is continuously evolving and the past few years have seen a cascade of decisions from appellate courts. Trusts are so commonplace and yet often quite sophisticated and nuanced. When handling a divorce, it is critical to read the trust, understand its terms, and understand the law as it pertains to the ability to attack a trust and how to defend against such an attack.

Life insurance often becomes a factor in divorce, both with respect to existing policies held within or outside of trusts and with respect to new policies that may be required to provide security for ongoing financial obligations. Careful and creative planning can often inure to both parties' benefit.

Our panel of family law and trust litigation experts discuss best practices when representing divorcing parties who have an interest in or seek to claim an interest in a spouse's trust. The panel reviews trust terms, landmark decisions, and strategies on both sides of trust- and insurance-related claims in divorce.

Agenda

- What Are the Key Words and Concepts to Understand When Analyzing a Trust Incident to Divorce Litigation?
- How Are Trust Interests Treated When Equitably Dividing Assets?
- What Are the Landmark Decisions in This Area, and How Has the Law Evolved?
- Can a Prenuptial or Postnuptial Agreement Limit One Spouse's Access to the Other's Trust Interests?
- Can Decanting be an Effective Tool Before or During Divorce Proceedings?
- How Can Life Insurance be Used Most Effectively, Inside or Outside of Trust?
- "Ask the Experts" Q&A Session

Faculty

Tiffany M. Bentley, Esq., *Day Pitney LLP, Boston*, Cochair

Lisa M. Cukier, Esq., *Rubin and Rudman LLP, Boston*, Cochair

Hon. Katherine A. Field, *First Justice, Bristol Probate and Family Court, Commonwealth of Massachusetts*

Mary H. Schmidt, Esq., *Verrill Dana LLP, Boston*



Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, June 5, 2025

3:00 pm–5:00 pm

Program # 2250279WBC

REBROADCAST

Friday, June 20, 2025

10:00 am–12:00 pm

Program # 2250279RB1

REBROADCAST

Monday, June 30, 2025

12:00 pm–2:00 pm

Program # 2250279RB2

ON DEMAND WEBCAST

View after Monday, June 30, 2025

Program # 2250279WBA

Tuition *(includes written materials)*

- \$175
- \$157.5 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits

How Judges Consider Thorny Family Law Cases

Untangling love, law, and little ones from the bench

Gain a deep understanding of the complex decision-making processes with which judges wrestle when adjudicating sensitive and cutting-edge family law matters. This program delves into the nuanced interplay of legal principles, emotional dynamics, and ethical considerations that shape judicial reasoning. Through expert-led discussions and case studies, Probate and Family Court judges explore how they weigh competing interests, and the intricacies of equitable distribution, all while striving for fairness in an emotionally-charged environment.

The program also aims to demystify the factors that influence judicial outcomes, including statutory guidelines, precedent-setting cases, and the ever-changing socio-cultural context of family dynamics. Gain a better understanding of the challenges judges face and the critical thinking skills required to navigate the often tumultuous waters of family law.

Anticipate charged debates among our esteemed judges!

Agenda

- Judicial Decision-Making Process
- Highly Personal & Emotional Cases Involving Frozen Embryos, Engagement Rings, and Rehoming Pets
- Case Studies
- Applying Decisions to the Real World
- Effectively Withdrawing as Counsel
- Issues with Motions to Continue (Trials and Other Hearings)
- Issues with Expert Witnesses
- Issues with Trial Exhibits

Faculty

Vicki L. Shemin, Esq., *LICSW, ACSW, Fields and Dennis LLP, Wellesley Hills, Chair*
Hon. Thomas J. Barbar, *Associate Justice, Probate and Family Court, Commonwealth of Massachusetts*
Hon. Melanie J. Gargas, *Associate Justice, Probate and Family Court, Commonwealth of Massachusetts*
Hon. Janine D. Rivers, *Associate Justice, Probate and Family Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, March 11, 2025
3:00 pm–5:00 pm
Program # 2250285WBC

REBROADCAST

Wednesday, March 26, 2025
10:00 am–12:00 pm
Program # 2250285RB1

REBROADCAST

Thursday, April 3, 2025
12:00 pm–2:00 pm
Program # 2250285RB2

ON DEMAND WEBCAST

View after Thursday, April 3, 2025
Program # 2250285WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Identifying & Proving When 50/50 Isn't Fair

An equitable division in a divorce is not always equal

Many divorce cases end up resolving—either after trial or by negotiated agreement—with a 50/50 division of assets. Many times, this is the “right” result. But when should there be a disparate division of assets?

Join our panel of practitioners and judges as we consider when an equitable division isn't equal, what the court looks for, what the law says, and how to argue for a disparate division. In a legal landscape that sometimes seems to favor equal division, knowing when and how to advocate otherwise is critical for any family law practitioner.

Agenda

- Impact of Inherited Assets on the Division; Timing of Acquisition; Size of Inheritance; Reliance
- Trusts—Are They in the Estate or Not? If So, How Do They Impact the Division?
- Interrelationship Between Length of Alimony and Property Division Under Alimony Reform Act
- Opportunity for Future Acquisition of Assets and Other Section 34 Reasons for Disparate Division
- Dissipation of Assets and the Elements Required to Prove It

Faculty

Jonathan E. Fields, Esq., *Fields and Dennis LLP, Wellesley, Chair*

Hon. Christine D. Anthony, *Associate Justice, Probate and Family Court, Commonwealth of Massachusetts*

Hon. Thomas J. Barbar, *Associate Justice, Probate and Family Court, Commonwealth of Massachusetts*

Alexander D. Jones, Esq., *Brick, Jones, McBrien & Hickey LLP, Needham*

Richard M. Novitch, Esq., *Todd & Weld LLP, Boston*

Dates & Location

Register at www.mcle.org

BOSTON

Wednesday, June 25, 2025

2:00 pm–5:00 pm

MCLE Conference Center,

10 Winter Place, via Winter Street

Program # 2250276P01

LIVE WEBCAST

Wednesday, June 25, 2025

2:00 pm–5:00 pm

Program # 2250276WBC

REBROADCAST

Thursday, July 10, 2025

2:00 pm–5:00 pm

Program # 2250276RB1

REBROADCAST

Friday, July 18, 2025

9:30 am–12:30 pm

Program # 2250276RB2

ON DEMAND WEBCAST

View after Friday, July 18, 2025

Program # 2250276WBA

Tuition *(includes written materials)*

- \$225
- \$202.50 MCLE Members
- \$112.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

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Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Impact of *Openshaw* on Alimony

What practitioners need to know about the “need” for alimony after Openshaw

As a case of first impression, *Openshaw v. Openshaw* further refines the definition of “need” in G.L. c. 208, § 53 by adding routine savings as a component of alimony in qualified cases.

The session explores *Openshaw*’s impact on previous cases’ interpretation of the definition of “need” in G.L. c. 208, § 53. Participants gain insight and practical guidance on how a court may determine what constitutes routine savings and marital lifestyle, and how to calculate the savings component of alimony.

This program is essential for Massachusetts family law practitioners who want to stay current on case law developments and ensure they are equipped to address the challenges and opportunities presented by this seminal case.

Agenda

- How *Openshaw* Further Refines the Definition of “Need” for Alimony in G.L. c. 208, § 53
- What Constitutes Savings and a Pattern of Savings
- How to Calculate the Savings Component of Alimony
- What Period of Expenses is Relevant to Determine the “Marital Lifestyle” for Alimony

Faculty

Margaret J. Palladino, Esq., *Massachusetts Family Advocacy Coalition (MFAC), Wellesley*, Cochair
Lori S. Johnson, Esq., *Massachusetts Family Advocacy Coalition (MFAC), Wellesley*, Cochair
Jason V. Owens, Esq., *Lynch & Owens P.C., Hingham*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, April 10, 2025
10:00 am–11:30 am
Program # 2250286WBC

REBROADCAST

Friday, April 25, 2025
12:00 pm–1:30 pm
Program # 2250286RB1

REBROADCAST

Monday, May 5, 2025
2:00 pm–3:30 pm
Program # 2250286RB2

ON DEMAND WEBCAST

View after Monday, May 5, 2025
Program # 2250286WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1.5 CLE credits



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for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

Ins & Outs of Jurisdiction in Family Law Cases

Where borders blur and battles begin

Explore the complexities of jurisdiction in family law cases with this essential program tailored for Massachusetts practitioners. The program provides a comprehensive overview of the critical jurisdictional issues that often arise in divorce, custody, child support, and other domestic relations cases. Participants gain valuable insights into the application of Massachusetts laws, with a focus on resolving multi-state disputes. This program also addresses challenges in asserting or contesting jurisdiction, including emergency jurisdiction, forum shopping, and dealing with international cases.

Led by experienced family law attorneys, this session combines real-world examples, case law updates, and practical strategies to navigate jurisdictional hurdles effectively. Attendees will leave with the tools needed to confidently evaluate jurisdictional questions, draft persuasive arguments, and protect their clients' interests in complex litigation. Whether you are new to family law or seeking to deepen your expertise, this program offers valuable guidance for achieving success in Probate and Family Court. Don't miss this opportunity to enhance your practice.

Agenda

- Understanding Jurisdictional Frameworks
- Addressing Multi-State and International Issues
- Emergency and Temporary Jurisdiction
- Practical Strategies for Practitioners
- "Ask the Experts" Q&A Session

Faculty

Brian T. Salisbury, Esq., *Doherty, Dugan, Cannon, Raymond & Weil, PC, Franklin*, Chair
Virginia W. Connelly, Esq., *Fedele and Murray, PC, Norwood*
Kimberley Keyes, Esq., *Lynch & Owens PC, Hingham*
Anna M. Martignetti, Esq., *Prince Lobel Tye LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, July 22, 2025
10:00 am–12:00 pm
Program # 2250288WBC

REBROADCAST

Wednesday, August 6, 2025
12:00 pm–2:00 pm
Program # 2250288RB1

REBROADCAST

Thursday, August 14, 2025
2:00 pm–4:00 pm
Program # 2250288RB2

ON DEMAND WEBCAST

View after Thursday, August 14, 2025
Program # 2250288WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Intersection Between Transactional Lawyering & Family Law

How to collaborate with your experts

Often divorce lawyers are confronted with complex tax, real estate, business, and IP issues. This program addresses collaboration with transactional lawyers; when to engage such lawyers to assist in matters outside of a family lawyer's comfort zone; when and whom to engage with respect to complex corporate issues; understanding common incentive equity interests for startups and technology companies (including restricted stock and stock options); and understanding and valuing certain assets, including business entities and intellectual property such as patents, trademarks, and royalties.

Although only a small percentage of divorce cases are tried to conclusion, successful domestic relations practitioners must be prepared to try cases or successfully negotiate a settlement and often require transactional expertise outside of their own expertise as divorce lawyers. This program helps you improve your techniques by giving you the unique opportunity to observe transactional lawyers specializing in corporate law, intellectual property, and commercial real estate, as well as professions in the area of complex tax issues related to these assets.

The expert faculty present and analyze case scenarios with a judge. They discuss techniques and strategy considerations in assessing discovery, determining value of corporate interests, intellectual property, and commercial real estate, and discuss drafting of documents often outside the expertise of law practices specializing in divorce.

Agenda

- What Discovery and Documents are Appropriate to Request
- What Tax Related Issues are Necessary to Explore as Discovery is Planned
- How to Assist Drafting Interrogatories and Depositions
- Equity Transfer—What You Can and Cannot Do
- How to Monitor Assets, What to Allocate Now and Over Time
- Real Estate: Ltd Partnership. LLC Interest Valued
- How to Understand and Value IP and Patents, Trademarks and Royalties, as well as Start-Ups?

Faculty

Nancy A. Freed, Esq., *Prince Lobel Tye LLP, Boston*, Cochair

Claire Forkner, Esq., *Lee and Rivers*, Cochair

Honorable Christine Anthony, *Middlesex Probate and Family Court, Commonwealth of Massachusetts*

Robert Stankus, *CBIZ, Boston*

Max Riffin, Esq., *Prince Lobel Tye LLP, Boston*

John Chu, Esq., *Prince Lobel Tye LLP, Boston*

Matthew Vella, Esq., *Prince Lobel Tye LLP, Boston*

Ann Sobolewski, Esq., *Prince Lobel Tye, LLP, Boston*



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Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, April 1, 2025

9:30 am–12:30 pm

Program # 2250290WBC

REBROADCAST

Wednesday, April 16, 2025

2:00 pm–5:00 pm

Program # 2250290RB1

REBROADCAST

Thursday, April 24, 2025

9:30 am–12:30 pm

Program # 2250290RB2

ON DEMAND WEBCAST

View after Thursday, April 24, 2025

Program # 2250290WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits

Practical Approaches to Calculating Child Support

Child support made clear and comprehensible

Issues of support are present in every divorce or domestic relations case in which minor or unemancipated children are involved. Family law practitioners are intimately aware of the utility of the Child Support Guidelines Worksheet, the most recent iteration of which became effective on October 4, 2021. While the text of the Guidelines provides practitioners with useful information about their application, there is still much left for interpretation. As a result, issues regarding income, applicable deductions, and credits for childcare, among other things, become ripe for dispute. The interplay of alimony in the post-*Cavanagh* world only adds to the increasingly complex discourse, commanding the family law practitioner to consider numerous approaches to support calculations, and the tax advantages or disadvantages to same.

Join our experienced faculty in this program as they explore the steps to approaching child support calculations under a strict application of the Child Support Guidelines Worksheet, including considerations of health and dental insurance, childcare, and college-educational costs. The expert panel also discusses methods of advocacy under various scenarios (including a *Cavanagh* analysis) through the lens of a payor and of a recipient, including the tax implications of each. Lastly, we get a view from the bench as to the best approach for presenting support calculations and the pitfalls to avoid.

Agenda

- Review Best Practices for Utilizing the Child Support Guidelines Currently in Effect
- Explore Prominent Issues Regarding Income, Deductions, and Credits in the Guidelines Worksheet
- Understand the Application of *Cavanagh*, the Interplay of Alimony and Child Support, and Applicable Tax Considerations
- Know the Best Approaches for Handling Support Scenarios in Your Case

Faculty

Rachel Deering, Esq., *Verrill Dana LLP, Boston*, Chair
 Hon. Michael D. Anderson, *Probate and Family Court, Commonwealth of Massachusetts*
 Sara E. Kitaeff, Esq., *Rubin and Rudman LLP, Boston*
 Emily Nicholson, Esq., *Warner, Federico & Ryan LLP, Boston*
 Kimberley A. Train, CPA/ABV, PKF, *O'Connor Davies, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, July 17, 2025
 2:00 pm–5:00 pm
 Program # 2250282WBC

REBROADCAST

Friday, August 1, 2025
 9:30 am–12:30 pm
 Program # 2250282RB1

REBROADCAST

Monday, August 11, 2025
 2:00 pm–5:00 pm
 Program # 2250282RB2

ON DEMAND WEBCAST

View after Monday, August 11, 2025
 Program # 2250282WBA

Tuition *(includes written materials)*

- \$225
- \$202.50 MCLE Members
- \$112.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



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for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

Preparing Rule 401 Financial Statements

The dos and don'ts for parties appearing in Probate and Family Court in the Commonwealth

Every party who appears in Probate and Family Court on a financial issue in connection with a divorce, child support, alimony, financial contempt, or financial modification is required to submit a Rule 401 financial statement form. For any party tasked with providing information regarding income, assets, liabilities and expenses, the prospect of completing the financial statement can be a daunting one. Whether a W-2 wage earner, a self-employed individual, or a business owner, reporting income is often more complicated than expected. Likewise, the proper way to reflect assets and/or liabilities held in more complex situations can be a challenge. The stakes are often high as financial statement inaccuracies can create confusion or credibility issues for the erring party.

Join experienced family law practitioners as we examine common pitfalls in drafting financial statements and provide practical tips for gathering and reflecting information on this important court form. Topics include how to properly report parties' income, including that of self-employed litigants and business owners, how to appropriately disclose assets and liabilities (including how to reflect beneficial interests in trusts, unvested stock, and jointly titled assets), and how to generally best capture your clients' financial circumstances in a financial statement.

Agenda

- Understanding How to Use a Tax Return, Tax Reporting Documents (W-2, 1099, K-1, etc.), and Paystubs to Assist in Accurately Reflecting Income on a Financial Statement
- Understanding How and When to Use Schedule A
- Best Practices for Properly Reflecting Assets and/or Liabilities on the Financial Statement
- Practical Tips for Properly Reflecting Expenses of the Different Family Members Involved in the Matter
- Practical Tips on What to Do or NOT Do to Avoid Creating Credibility Issues with Your Judge
- "Ask the Experts" Q&A Session

Faculty

Gina J. Calabro, Esq., *Brick, Jones, McBrien & Hickey LLP, Needham*, Chair
Kristin Saige Doeberl, Esq., *Verrill Dana LLP, Boston*
Lindsay V. Mason, Esq., *Lee & Rivers, LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, April 16, 2025
10:00 am–12:00 pm
Program # 2250278WBC

REBROADCAST

Thursday, May 1, 2025
2:00 pm–4:00 pm
Program # 2250278RB1

REBROADCAST

Friday, May 9, 2025
12:00 pm–2:00 pm
Program # 2250278RB2

ON DEMAND WEBCAST

View after Friday, May 9, 2025
Program # 2250278WBA

Tuition *(includes written materials)*

- \$175
- \$157.5 MCLE Members
- \$87.5 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Financial Aspects of Divorce in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Selecting, Conversing with & Cross-Examining GALs: How to Control the Conversation

Preparing for the GAL

High conflict custody disputes and guardian ad litem (GALs) are an inevitable combination, and once a GAL has been appointed, preparation of your case starts here. Initiating a GAL investigation is a strategic and thoughtful process for the attorneys *and* the GAL. Join our experts as we discuss the fundamentals of a GAL investigation and explore topics including selecting a GAL; requesting a privilege GAL; conducting discovery; and deposing and cross-examining GALs.

Agenda

- Considerations When Selecting a GAL for Your Case
- Why a GAL Would or Would Not Choose to Have a Privilege GAL
- Can You Depose or Cross-Examine a Privilege GAL?
- How to Obtain the GAL's Records
- Preparing for Trial and Testimony of a GAL
- Attorney's Perspective on Testimony from GAL
- What GALs Should Know about Testifying
- "Ask the Experts" Q&A Session

Faculty

Theresa B. Ramos, Esq., *Tracey, Roman & Ramos, PC, Wellesley Hills, Chair*

Premela G. Deck, Esq., *SD Law, PC, Canton*

Jennifer Sevigney Durand, Esq., *Durand Family Law LLC, Canton*

Linda Medeiros, Esq., *Law Office of Linda Medeiros, Danvers*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, April 29, 2025

12:00 pm–4:00 pm

Program # 2250274WBC

REBROADCAST

Wednesday, May 14, 2025

10:00 am–2:00 pm

Program # 2250274RB1

REBROADCAST

Thursday, May 22, 2025

12:00 pm–4:00 pm

Program # 2250274RB2

ON DEMAND WEBCAST

View after Thursday, May 22, 2025

Program # 2250274WBA

Tuition *(includes written materials)*

- \$225
- \$202.50 MCLE Members
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Materials

- E-materials link emailed upon registration
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Snapshot of Abortion Law in America 2025

State and federal reproductive rights

Abortion access has been at the forefront of political and policy debates since the U.S. Supreme Court overturned *Roe v. Wade* in June 2022, triggering abortion bans and other restrictions in nearly half the states across the country. While the fight for reproductive rights has largely played out in state legislatures and ballot initiatives in the years since, a second Trump presidency likely means new legal restrictions on the federal level as well.

In this program, we revisit the pre-*Dobbs* landscape to explain how we arrived at this moment, followed by a discussion of the subsequent restrictions and constitutional concerns that the patchwork of new bans and state shield laws creates. The speakers then cover emerging issues on the federal level, including potential enforcement of the Comstock Act and revisiting the legal battles over mifepristone and EMTALA, and how both state and federal restrictions are likely to impact vulnerable and historically marginalized populations

Agenda

- Overview of the Pre-*Dobbs* Landscape
- Post-*Dobbs* State Restrictions and Subsequent Shield Laws
- Emerging Federal Concerns: Comstock, EMTALA, and Mifepristone Restrictions
- Discussion of the Effects on Vulnerable and Historically Marginalized Populations
- “Ask the Experts” Q&A Session

Faculty

MaryRose Mazzola, Esq., *Chief External Affairs Officer, Planned Parenthood, East Boston, Chair*
Prof. Aziza Ahmed, *Co-Director, BU Law Program on Reproductive Justice, Boston University School of Law, Boston*

Prof. Nicole Huberfeld, *Edward Utley Prof. of Health Law; Co-Director, BU Law Program on Reproductive Justice, Boston University School of Law, School of Public Health, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, July 24, 2025
10:00 am–12:00 pm
Program # 2250287WBC

REBROADCAST

Friday, August 8, 2025
12:00 pm–2:00 pm
Program # 2250287RB1

REBROADCAST

Monday, August 18, 2025
2:00 pm–4:00 pm
Program # 2250287RB2

ON DEMAND WEBCAST

View after Monday, August 18, 2025
Program # 2250287WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

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Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Strategically Advocating for Custody of Children with Special Needs

When the best interests of the child aren't straightforward

While the Probate and Family Court makes custody determinations by applying the uniform standard of the child's best interests, there is nothing uniform about advocating for custody of children with special needs. In matters involving children with special needs, determining what is in that child's best interests may require a complex analysis. Advocacy for a particular custody arrangement may be very individualized and may require exploring and presenting evidence on a number of factors.

Join our experts as we consider the issues that impact custody determinations for children with special needs, and how you can be best prepared to strategically advocate on behalf of your client.

Agenda

- What Are a Child's Special Needs? Gathering Relevant and Reliable Information to Educate the Advocate and the Court
- Assessing Family History, Caretaking, and Decision-Making
- Shared v. Sole Legal Custody: When a Child's Special Needs Give Rise to More Complex Educational, Health, or Welfare Decision-Making and Co-Parenting
- Parenting Plans for Children with Physical or Intellectual Disabilities: How to Best Understand What Plan Meets their Best Interests
- Should Parenting Plans Differ Between Siblings With/Without Special Needs?
- Use of Care Providers and Experts
- Use of GALs
- Use of Parent Coordinators / Parent Coaching in Post-Divorce Conflicts
- Common Arguments For and Against Shared Legal and Physical Custody
- "Ask the Experts" Q&A Session

Faculty

Claire C. Tutwiler, Esq., *D'Amico Tutwiler, PC, Wellesley Hills*, Chair

Stephanie W. Lyons, Esq., *Lyons Law, PC, Melrose*

Alessandra Petruccelli, Esq., *Law Office of Alessandra Petruccelli, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, July 9, 2025

2:00 pm–4:00 pm

Program # 2250283WBC

REBROADCAST

Thursday, July 24, 2025

12:00 pm–2:00 pm

Program # 2250283RB1

REBROADCAST

Friday, August 1, 2025

10:00 am–12:00 pm

Program # 2250283RB2

ON DEMAND WEBCAST

View after Friday, August 1, 2025

Program # 2250283WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

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Materials

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CLE Credits

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When Child Custody Crosses State & National Boundaries

The nuts and bolts of removal and defending the same

While parents have the right to relocate, taking their minor children with them is another matter. These types of cases are called removal cases, and they are some of the most difficult cases for families as well as family law practitioners. If the proper measures for relocating a child are not followed, the transgressing parent may be held in contempt of court, which can lead to fines or jail time. As such, it is imperative to follow the correct channels before moving with a child to another state or even another country.

Join us as we look at what happens when a parent wants to relocate with minor children—whether from Massachusetts to another state or outside of the country, as well as what can be done to stop removal.

Agenda

- Is Permission Necessary?
- What Massachusetts Courts Consider When Allowing or Blocking Removal and Relocation
- Moving to Another State
- Moving to Another Country
- What Can You Do to Fight Departure?
- Consequences of Not Following the Proper Channels
- “Ask the Experts” Q&A Session

Faculty

Breanishea Amaya, Esq., *Clinical Law Professor, New England Law | Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, April 7, 2025

2:00 pm–4:00 pm

Program Number: 2250284WBC

REBROADCAST

Tuesday, April 22, 2025

12:00 pm–2:00 pm

Program Number: 2250284RB1

REBROADCAST

Wednesday, April 30, 2025

10:00 am–12:00 pm

Program Number: 2250284RB2

ON DEMAND WEBCAST

View after Wednesday, April 30, 2025

Program Number: 2250284WBA

Tuition *(includes written materials)*

- \$175
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Materials

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CLE Credits

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When DCF or DYS Steps Into Your Case

Be prepared to steer your client and your case through this complicated involvement

As a family law practitioner, would you know what to do if your client became the subject of a Department of Children & Families (DCF) investigation in the course of family law litigation? Or how to advise your client if the client's child becomes the subject of a Department of Youth Services (DYS) delinquency or youthful offender proceeding in the midst of a custody dispute? In this seminar, the panel of experts provides legal background and practice tips for the family law practitioner in working with both agencies, whose involvement in family law cases is increasingly common.

Don't miss this opportunity to better understand the agencies, the procedures, the law, and your role in cases that pose unique challenges and require strategies for navigating the rules and procedures of which family law practitioners often are unfamiliar. Let our experts bring you up to speed, so you are prepared to meet these challenges head on. Whether you have yet to have a DCF/DYS-involved family law client or you have had many, this panel provides valuable information to ensure effective representation.

Agenda

- Anatomy of a DCF Investigation and the Administrative Appeals Process
- DCF Investigations in Relation to Other Court Investigations
- An Introduction to DYS Cases in the Family Law Context
- Best Practices Counseling Your Client
- Key Cases and Regulations
- Evidentiary Issues
- Judicial Perspective
- "Ask the Experts" Q&A Session

Faculty

Sandra E. Lundy, Esq., *Lundy Legal LLC, Provincetown, Chair*

Evan P. Bell, Esq., *Law Office of Evan Bell, Boston*

Stacey G. Bloom, Esq., *General Counsel, Department of Youth Services, Commonwealth of Massachusetts*

Hon. Megan H. Christopher, *Probate and Family Court, Commonwealth of Massachusetts*

Betsey J. Clement, Esq., *Department of Children and Families, Northern Legal Office, Commonwealth of Massachusetts*

Jamie B. Wallerstein, Esq., *Danvers*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, July 1, 2025

2:00 pm–5:00 pm

Program # 2250289WBC

REBROADCAST

Wednesday, July 16, 2025

9:30 am–12:30 pm

Program # 2250289RB1

REBROADCAST

Thursday, July 24, 2025

2:00 pm–5:00 pm

Program # 2250289RB2

ON DEMAND WEBCAST

View after Thursday, July 24, 2025

Program # 2250289WBA

Tuition *(includes written materials)*

- \$225
- \$202.50 MCLE Members
- \$112.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Practitioner's Guide to State Intervention in the Family ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



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23rd Annual Municipal Law Conference 2025

Keep your practice on the cutting edge of local government law

Lawyers who represent and advise our cities, towns, or other public sector clients encounter complex, multi-disciplinary questions daily, ranging from A (affirmative litigation) to Z (zoning). The breadth and depth of legal competence required of the public sector attorney can be staggering. Similarly, attorneys who represent private clients in their dealings with local government are working in an ever-changing legal framework and are challenged to keep abreast of the rapidly evolving legal landscape. Get the latest essential updates and developments from the legislature, government regulators, and courts. The accelerating rate of change in municipal law makes this *Conference* indispensable to those who work in and with the public sector. Learn how your counterparts across the Commonwealth are navigating the latest legal challenges in the municipal arena!

Agenda

9:00 am–9:10 am	Welcome & Introduction
9:10 am–9:55 am	Environmental Law Update
9:55 am–10:40 am	Employment Law Update
10:50 am–11:35 am	Cyber Issues, Ransomware, Insurance
11:35 am–12:00 pm	Featured Presentation: Key Issues & Opportunities Facing Municipalities Today Councilor Sumbul Siddiqui shares an update on novel zoning initiatives adopted by the Cambridge City Council within the last few years to address and tackle issues such as affordable housing and housing insecurity. She also discusses her work with the Commonwealth Development Compact, public engagement strategies, and use of opioid settlement funds.
1:00 pm–1:45 pm	Legislative Update
1:45 pm–2:30 pm	Municipal Finance
2:40 pm–3:25 pm	Land Use & Dover Cases Update
3:25 pm–4:10 pm	Administrative Appeals
4:10 pm–4:55 pm	Code Enforcement
4:55 pm–5:00 pm	“Ask the Experts” Q&A Session

Faculty

Ivria G. Fried, Esq., *Harrington Heep LLP, Wellesley*, Cochair; James B. Lampke, Esq., *Lampke & Lampke, Hull*, Cochair; Robert W. Ritchie, Esq., *Formerly Massachusetts Assistant Attorney General, South Hadley*, Cochair; Andrew N. Bettinelli, Esq., *Harrington Heep LLP, Wellesley*; Donna M. Brewer, Esq., *Harrington Heep LLP, Wellesley*; Michael Carroll Cunningham, Esq., *Town of Arlington Law Department*; John J. Davis, Esq., *Pierce, Davis & Perritano LLP, Boston*; Matthew J. Hamel, Esq., *Pierce Davis & Perritano, Boston*; Jillian N. Jagling, Esq., *West Group Law, PLLC, Providence, RI*; Amy E. Kwezell, Esq., *KP Law, PC, Boston*; Gregor I. McGregor, Esq., *McGregor Legere & Stevens, PC, Boston*; Whitney C. Pasternack, Esq., *Public Health Commission, City of Boston*; Stephen G. Roche, Esq., *Law Department, City of Springfield*; Sumbul Siddiqui, *Council Member, Cambridge City Council*; Stacey Klein Verde, Esq., *City of Brockton*; Kenneth M. Woodland, Esq., *Chief, Bureau of Municipal Finance Law, Commonwealth of Massachusetts*



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Dates & Locations

Register at www.mcle.org

BOSTON

Wednesday, May 21, 2025
9:00 am–5:00 pm
MCLE Conference Center
10 Winter Place, via Winter Street
Program # 2250212P01

LIVE WEBCAST

Wednesday, May 21, 2025
9:00 am–5:00 pm
Program # 2250212WBC

REBROADCAST

Thursday, June 5, 2025
9:00 am–5:00 pm
Program # 2250212RB1

REBROADCAST

Friday, June 13, 2025
9:00 am–5:00 pm
Program # 2250212RB2

ON DEMAND WEBCAST

View after Friday, June 13, 2025
Program # 2250212WBA

Tuition *(includes written materials)*

- \$275
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Materials

Massachusetts Municipal Law ebook, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for in-person registrants
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 5.5 CLE credits

IN PERSON & ONLINE CONFERENCE

25th Annual School Law Conference 2025

The latest on issues affecting schools, educators, students, and parents

School law is a comprehensive and constantly evolving field. Keeping up with the flood of new developments presents a greater challenge than ever for busy practitioners. MCLE's *25th Annual School Law Conference 2025* examines the latest transformations and trends in school-related laws, regulations, policies, and practices. Experienced attorneys and other school-related professionals distill the most significant updates of the preceding year into a single day.

The *Conference* offers a comprehensive review of developments in the law through court cases, BSEA decisions, legislation, and regulatory changes. Hear seasoned attorneys offer up-to-date advice on cutting-edge topics. You can participate online or enjoy the opportunity for networking in person. Whether you represent school districts, school employees, or parents and students, the *Conference* is a necessity for your practice.

Agenda

- **Featured Panel: Parents' Rights in Public Schools—What Do Parents Have the Right to Know, Say, and Do?**
 - Addressing parental challenges to school practices in such areas as gender identity disclosure policies, bullying investigations, curricular topics and materials, school library books, sex education, racial equity policies, and social-emotional learning
- **Education Law Update 2025**
 - The latest from the BSEA, Courts, Legislature, DESE, and USDOE
- **School Discipline: Top Ten Dos and Don'ts for Student and School Advocacy**
- **"Hot Topics" for 2025**
 - Including controversies over technology (artificial intelligence, TikTok attacks, student cell phone use in schools), post-secondary transition planning, and rights of LGBTQ+ students
- **"Ask the Experts" Q&A Session**

Faculty

Eileen M. Hagerty, Esq., *Kotin, Crabtree & Strong LLP, Newton*, Cochair; Catherine L. Lyons, Esq., *Lyons Law Group LLC, Rockland*, Cochair; Elizabeth Cabral-Townson, Esq., *Lyons Law Group LLC, Rockland*; Reece Erlichman, Esq., *Director, Bureau of Special Education Appeals, Commonwealth of Massachusetts*; Derek F. Folan, *Superintendent, Canton Public Schools, Canton*; Laura E. Gillis, Esq., *Gillis Law LLC, Topsfield*; Justin R. Gomes, Esq., *Stoneman, Chandler & Miller LLP, Boston*; Lisa M. Lana, Esq., *Youth Advocacy Division, Committee for Public Counsel Services, Commonwealth of Massachusetts*; Matthew W. MacAvoy, Esq., *Nuttall, MacAvoy & Joyce, PC, Marshfield*; Pamela S. Milman, Esq., *Education Consulting, Advocacy & Legal Services LLC, Saugus*; Caitlin L. Mulrooney, Esq., *Murphy, Lamere & Murphy, PC, Braintree*; Nancy N. Nevils, Esq., *Stoneman, Chandler & Miller LLP, Boston*; Timothy A. Sindelar, Esq., *The EdLaw Project, Youth Advocacy Foundation, Roxbury*; Paige L. Tobin, Esq., *Murphy, Lamere & Murphy, PC, Braintree*; Felicia S. Vasudevan, Esq., *Murphy, Hesse, Toomey & Lehan LLP, Quincy*

Dates & Locations

Register at www.mcle.org

BOSTON

Wednesday, March 19, 2025
9:30 am–4:00 pm
MCLE Conference Center
10 Winter Place, via Winter Street
Program # 2250211P01

LIVE WEBCAST

Wednesday, March 19, 2025
9:30 am–4:00 pm
Program # 2250211WBC

REBROADCAST CC

Thursday, April 3, 2025
9:30 am–4:00 pm
Program # 2250211RB1

REBROADCAST CC

Friday, April 11, 2025
9:30 am–4:00 pm
Program # 2250211RB2

ON DEMAND WEBCAST CC

View after Friday, April 11, 2025
Program # 2250211WBA

Tuition (includes written materials)

- \$275
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Materials

School Law in Massachusetts and *Massachusetts School Law Sourcebook & Citor 2025* ebooks, plus speaker materials

- E-materials link emailed upon registration
- Complimentary print book for in-person registrants
- Transcript & videorecording emailed 2 weeks post-program

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Emerging Issues in Title IX Compliance, Investigations & Litigation

Legal changes and best practices through the lens of new regulations

Allegations of sexual misconduct on college campuses and challenges to the fairness and thoroughness of investigative and adjudicative processes persist. With the implementation of the U.S. Department of Education's updated regulations in August 2024 as well as federal litigation and a recent decision from the U.S. Supreme Court calling into question the deference to be afforded to U.S. Department of Education guidance, compliance is increasingly challenging. Some schools are also enjoined from publishing updated policies because of federal injunctions far outside of Massachusetts. For this reason, schools and students continue to face even greater uncertainty and look to legal counsel for navigating complex processes.

Learn from three experienced Title IX attorneys, two of whom regularly advise colleges and universities and conduct investigations or serve as adjudicators, and one who works directly with students to prepare and advise them throughout the administrative process. The knowledgeable panel share insights on the many facets of sexual misconduct cases on campus—including assisting colleges and universities in developing and executing campus policies and processes, gathering evidence and preparing for an investigator interview, investigating claims of sexual misconduct in a fair and impartial manner, navigating the “live hearing” and other technical requirements of the regulations, and responding to charges filed with the U.S. Department of Education's Office for Civil Rights (OCR). The panel also address the latest court opinions addressing legal challenges to student disciplinary proceedings. If your practice involves any Title IX issue or question, this is one seminar you should not miss.

Agenda

- Sexual Violence on Campus: An Update on the Changing Status of Title IX, the 2024 Regulations and OCR's Guidance, and How It All Works on a Post-Secondary Campus
- Investigations and Live Hearings: Best Practices in Handling Challenging Investigations
- Lawsuits Challenging Student Disciplinary Proceedings
- “Ask the Experts” Q&A Session

Faculty

Scott A. Roberts, Esq., *Hirsch Roberts Weinstein LLP, Boston*, Chair
 Philip J. Catanzano, Esq., *Education & Sports Law Group, LLC, Boston*
 Jessica L. Conklin, Esq., *Laredo & Smith LLP, Boston*



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Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, March 11, 2025
 9:30 am–12:30 pm
 Program # 2250214WBC

REBROADCAST

Wednesday, March 26, 2025
 2:00 pm–5:00 pm
 Program # 2250214RB1

REBROADCAST

Thursday, April 3, 2025
 1:00 pm–4:00 pm
 Program # 2250214RB2

ON DEMAND WEBCAST

View after Thursday, April 3, 2025
 Program # 2250214WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Effectively Representing Clients with Limited or No English Proficiency

Bridging language gaps

This program addresses practical challenges such as working with interpreters, understanding cultural nuances, and drafting clear, accessible client communications while maintaining attorney-client privilege.

Led by experienced practitioners, the program offers actionable insights on navigating court proceedings, discovery, and negotiations with clients facing language barriers. Participants gain tools for fostering trust, avoiding miscommunication, and mitigating risks associated with language misunderstandings. This essential training empowers attorneys to meet their duties while delivering equitable and effective legal services to a diverse client base.

Agenda

- Working Effectively With Interpreters
- Navigating Cultural Nuances
- Drafting Accessible Client Communications
- Mitigating Legal Risks

Faculty

Iris Coloma-Gaines, Esq., *Statewide Language Access Attorney, MLRI, Boston, Chair*

Bethany Yue-Ping Li, Esq., *Asian American Legal Defense and Education Fund, New York, NY*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, June 4, 2025

3:30 pm–5:00 pm

Program # 2250334WBC

REBROADCAST

Thursday, June 19, 2025

12:00 pm–1:30 pm

Program # 2250334RB1

REBROADCAST

Friday, June 22, 2025

10:00 am–11:30 am

Program # 2250334RB2

ON DEMAND WEBCAST

View after Friday, June 22, 2025

Program # 2250334WBA

Tuition *(includes written materials)*

- \$175
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Materials

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Health Care Decision-Making Authority

Healthcare agents, guardianships and Rogers orders

It is imperative for everyone, especially lawyers, to understand who has authority to make care and treatment decisions for themselves, along with their loved ones, patients and clients. This program is valuable to anyone who would like to untangle the web of legal standards and processes for exercising a health care proxy or guardianship under Massachusetts law. You learn about the authority of individuals who are appointed to make health care decisions for others, the legal standard for obtaining that authority, and the procedure for activating/revoking the relevant instruments. The program concludes with a series of increasingly complex scenarios to analyze under the framework presented.

Agenda

- Introduction: HCAs, Proxies, Guardianships, and Some Guy Named Roger
- Critical Terms to Understand
- Applicable Legal Standards
- Side-By-Side Comparison: HCA v. Guardianship
- Legal Authority of a Health Care Agent
- Duties of a Health Care Agent
- Steps for Obtaining and Invoking a Health Care Proxy
- Revoking a Health Care Proxy
- Legal Authority of a Guardianship
- Duties of a Guardian
- Steps for Obtaining a Guardianship
- Revoking a Guardianship
- Who Was Rubie Rogers?
- Obtaining and Exercising a *Rogers* Order
- Case Law Highlights
- Putting It into Practice: Scenario Discussions

Faculty

Brett Walker, Esq., *Deputy City Solicitor for Litigation, City of Worcester, Chair*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Friday, March 7, 2025
9:30 am–11:00 am
Program # 2250223WBC

REBROADCAST

Monday, March 24, 2025
12:00 pm–1:30 pm
Program # 2250223RB1

REBROADCAST

Tuesday, April 1, 2025
2:00 pm–3:30 pm
Program # 2250223RB2

ON DEMAND WEBCAST

View after Tuesday, April 1, 2025
Program # 2250223WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Learn more at www.mcle.org

Latest in Crimmigration 2025

Shifting sands—how to traverse the uncertain and ever-changing landscape of the immigration consequences of criminal activity

With the promise of mass deportations on the rise, and a focus on those non-nationals who may find themselves charged with a crime in the United States, many, many people will be targets for a broadening net of enforcement. Custody will be much more common and getting someone out of U.S. Immigration and Customs Enforcement (ICE) custody will be harder than it ever was before. How many times has your phone rung in your office only to hear the following: “Help! My husband has just been detained by ICE. I don’t know what to do!” A mother, brother, husband, or child has just been detained by Immigration and the family has no idea what to do. Where is the client? Where will they be taken? What happens next? What are the client’s rights? Can they get bond? How do the local jails treat immigration detainees and what are the special visitation policies?

This seminar focuses on some of the fundamentals and a few advanced tips of what to do when your client encounters the immigration consequences of criminal charges. If you represent non-citizen criminal defendants, you must attend this seminar.

Agenda

- Helping Your Client Assert Their Rights When Being Interviewed by ICE Agents
- ICE Enforcement at Local State Courthouses
- Dealing with ICE and How to Find Your Client
- Federal Immigration Custody vs. State Criminal Custody
- How to Habe Your Client from Federal Immigration Custody to State Court
- Plea Negotiations in the Deportation Age
- What is the Record of Conviction for Immigration Purposes?
- To Bail or Not to Bail? Why Posting Bail is Not Always the Best Choice
- How to Apply for Bond in the Immigration Court
- Motions for New Trial and Sentence Reduction—Strategies to Cut the Head Off the Deportation Octopus
- Emerging Trends in the Law and the Latest Cases
- “Ask the Experts” Q&A Session

Faculty

Rachel M. Self, Esq., *Rachel M. Self, PC, Boston*, Chair

Steven F. Day, Esq., *Taunton*

Maria S. Hwang, Esq., *Committee for Public Counsel Services, Malden*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, July 9, 2025

10:00 am–12:00 pm

Program # 2250219WBC

REBROADCAST

Thursday, July 24, 2025

2:00 pm–4:00 pm

Program # 2250219RB1

REBROADCAST

Friday, August 1, 2025

12:00 pm–2:00 pm

Program # 2250219RB2

ON DEMAND WEBCAST

View after Friday, August 1, 2025

Program # 2250219WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Immigration Practical Manual ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Learn more at www.mcle.org

Lawyer's Roadmap to the Division of Administrative Law Appeals

Unlocking the secrets of administrative law

Are you ready to elevate your legal practice and navigate the complexities of administrative appeals? Join us for an engaging program designed specifically for attorneys looking to master the ins and outs of the Division of Administrative Law Appeals (DALA) in Massachusetts. DALA serves as the central hub for administrative appeals, addressing cases from approximately 20 state agencies. This is your opportunity to learn from seasoned magistrates who provide invaluable insights on effectively representing your clients in this unique legal arena. Whether you are new to administrative law or looking to sharpen your skills, this seminar offers practical insights and expert advice that you won't find anywhere else. Equip yourself with the knowledge and strategies to advocate effectively for your clients in administrative proceedings.

Agenda

- **Deep Dive into DALA's Jurisdiction:** Understand the various types of appeals that come before DALA, equipping you to handle cases with confidence.
- **Lifecycle of an Appeal:** Follow a case from initiation to the magistrate's decision, demystifying the process and revealing best practices at each stage.
- **Discovery and Motions Practice:** Explore how discovery and motions in DALA differ from traditional court practice, ensuring you are fully prepared.
- **Maximizing Prehearing Conferences:** Learn strategies to navigate prehearing conferences effectively, making the most out of these crucial meetings.
- **Hearing Preparation:** Get a comprehensive overview of how to prepare for hearings, including agency-specific laws and strategies for presenting your evidence and witnesses.
- **Understanding Decisions:** Delve into the types of decisions DALA issues and what goes into a magistrate's ruling, giving you clarity on outcomes and next steps.
- **Post-DALA Pathways:** Explore the options available after a DALA decision, including agency review and court appeals, so you can guide your clients on the best course of action.

Faculty

Hon. James P. Rooney, *First Magistrate, Division of Administrative Law Appeals, Commonwealth of Massachusetts*, Chair; Hon. Yakov Malkiel, *Magistrate, Division of Administrative Law Appeals, Commonwealth of Massachusetts*; Hon. Natalie S. Monroe, *Chief Magistrate, Division of Administrative Law Appeals, Commonwealth of Massachusetts*; Melinda E. Troy, *Esq., Magistrate, Division of Administrative Law Appeals, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, May 22, 2025
12:00 pm–2:00 pm
Program # 2250222WBC

REBROADCAST

Friday, June 6, 2025
9:00 am–11:00 am
Program # 2250222RB1

REBROADCAST

Monday, June 16, 2025
2:00 pm–4:00 pm
Program # 2250222RB2

ON DEMAND WEBCAST

View after Monday, June 16, 2025
Program # 2250222WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

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Basic Public Benefits Advocacy Trainings

MCLE, the Massachusetts Law Reform Institute (MLRI), and other Massachusetts legal services programs collaborate to provide annual basic public benefits advocacy training events for the many public and private sector lawyers and community advocates who assist Massachusetts residents to qualify for and receive public benefits.



March–August 2025 Program Schedule

1. Elder Benefits Programs

Boston & Live Webcast—Thursday, April 17, 2025, 9:30 am–4:00 pm (2250057P01 / 2250057WBC)

Rebroadcasts—Friday, May 2, 2025, 9:30 am–4:00 pm (2250057RB1); Monday, May 12, 2025, 9:30 am–4:00 pm (2250057RB2)

Earn up to 5 CLE credits

2. Immigrants & Public Benefits

Boston & Live Webcast—Wednesday, March 19, 2025, 9:30 am–3:00 pm (2250055P01 / 2250055WBC)

Rebroadcasts—Thursday, April 3, 2025, 9:30 am–3:00 pm (2250055RB1); Friday, April 11, 2025, 9:30 am–3:00 pm (2250055RB2)

Earn up to 4 CLE credits

3. Income Maximization

Boston & Live Webcast—Tuesday, May 6, 2025, 9:00 am–1:00 pm (2250058P01 / 22500458WBC)

Rebroadcasts—Wednesday, May 21, 2025, 12:00 pm–4:00 pm (2250058RB1); Thursday, May 29, 2025, 10:00 am–2:00 pm (2250058RB2)

Earn up to 3 CLE credits

4. State & Federal Veterans' Benefits

Boston & Live Webcast—Tuesday, April 8, 2025, 9:30 am–3:30 pm (2250056P01 / 2250056WBC)

Rebroadcasts—Wednesday, April 23, 2025, 9:30 am–3:30 pm (2250056RB1); Thursday, May 1, 2025, 9:30 am–3:30 pm (2250056RB2)

Earn up to 5 CLE credits

5. Tax Benefits for Massachusetts Families

Boston & Live Webcast—Tuesday, March 11, 2025, 9:30 am–12:30 pm (2250269P01 / 2250269WBC)

Rebroadcasts—Thursday, Wednesday, March 26, 2025, 2:00 pm–5:00 pm (2250269RB1); Thursday, April 3, 2025, 9:30 am–12:30 pm (2250269RB2)

Earn up to 3 CLE credits

6. Tenants' Rights

Boston & Live Webcast—Wednesday, May 7, 2025, 9:30 am–3:30 pm (2250083P01 / 2250083WBC)

Rebroadcasts—Thursday, May 22, 2025, 9:30 am–3:30 pm (2250083RB1); Friday, May 30, 2025, 9:30 am–3:30 pm (2250083RB2)

Earn up to 5 CLE credits

7. Unemployment Insurance

Boston & Live Webcast Only—Thursday, March 6, 2025, 1:00 pm–4:30 pm (2250054P01 / 2250054WBC)

Rebroadcasts—Thursday, March 21, 2025, 10:00 am–1:30 pm (2250054RB1); Monday, March 31, 2025, 12:00 pm–3:30 pm (2250054RB2)

Earn up to 3 CLE credits

Tuition *each program*

- \$35 Legal Services Attorneys and Non Lawyer Advocates
- \$125 All Others

► See next pages for program details.

March–August 2025 Program Details

1. Elder Benefits Programs

Due in part to the high cost of living, older adults in Massachusetts have the second lowest levels of economic security in the nation. This training provides an overview of the key public benefits programs to help older adults meet their basic needs. Experts review the basic eligibility rules for cash benefit programs like SSI and Social Security Insurance benefits, home-based care services from the Office of Elder Affairs, and health care programs like Medicare and MassHealth. It also provides a brief summary of other public benefits available to older adults in Massachusetts.

Faculty

Kate Symmonds, Esq., *Massachusetts Law Reform Institute, Boston*

Majda Abbas, Esq., *Greater Boston Legal Services, Boston*

Andrew L. Bardetti, Esq., *South Coastal Counties Legal Services, Hyannis*

Rachel S. Brown, Esq., *Community Legal Aid, Worcester*

Deborah L. Filler, Esq., *Cambridge & Somerville Legal Services, Cambridge*

Shannon K. Turner, *Home Care Program Coordinator, Executive Office of Elder Affairs, Commonwealth of Massachusetts*

Svetlana Uimenkova, Esq., *Disability Law Center, Inc., Boston*

2. Immigrants & Public Benefits

This all-day training offers the nuts-and-bolts on how immigration status affects eligibility for state and federal public benefits. In the morning, you get an overview of how immigrants obtain legal status, how to read immigration documents in order to understand a person's legal status, and updates on any new immigration statuses, or other federal developments affecting access to benefits. You also learn from health law experts about MassHealth and other subsidized health care programs available to immigrants and their dependents. In the afternoon, you hear from benefits experts about other public benefits potentially available to low-income legal immigrants including: state and federal subsidized housing programs, emergency shelter, cash assistance (TAFDC and EAEDC) and the federal SNAP and child nutrition programs.

Faculty

Jeanne Funk, Esq., *Massachusetts Law Reform Institute, Boston, Chair*

Patricia J. Baker, *Massachusetts Law Reform Institute, Boston*

Mark Martinez, Esq., *Massachusetts Law Reform Institute, Boston*

Naomi A. Meyer, Esq., *Greater Boston Legal Services, Boston*

Andrea M. Park, Esq., *Massachusetts Law Reform Institute, Boston*

Victoria Pulos, Esq., *Massachusetts Law Reform Institute, Boston*

3. Income Maximization

This session is an overview focusing on various supplemental benefits and assistance programs which help working families and individuals to maximize their income and reduce their expenses. This training is designed as an overview of benefits. The subject areas are quite broad. This is not an in-depth analysis of any particular program. This training is for new and experienced legal services advocates, lawyers in private practice, social and health services workers, and community activists who want to learn about or get an update on this subject in order to help their clients.

Faculty

Julie McCormack, *Legal Services Center of Harvard Law School, Jamaica Plain, Chair*

Betsy Gwin, Esq., *Massachusetts Law Reform Institute, Boston*

Marion Hohn, Esq., *Central West Justice Center, Springfield*

4. State & Federal Veterans' Benefits

This training is for legal services advocates, lawyers in private practice, social and health services workers, veterans, lay advocates, legislative aides, and anyone else who wants to learn about the basics of state and federal veterans' benefits. The training covers state veterans' benefits under G.L. c. 115 (administered by the Massachusetts Department of Veterans' Services), and federal benefits for healthcare, service-connected disability compensation, and non-service-connected pensions (administered by the U.S. Department of Veterans Affairs). The basic application process, eligibility rules for veterans (military discharge status, financial eligibility, disqualifying conditions, refund status), and the disability requirements for benefits are addressed, along with the basics of filing an appeal and upgrading a less than honorable discharge.

Faculty

Anna Schleelein Richardson, Esq., *Veterans Legal Services, Boston*

Steven J. Connor, *Central Hampshire Veterans Services, Northampton*

Lynette Gabrila, *Wachusett Veterans' Services District, Gardner*

Betsy Gwin, Esq., *Veterans Legal Clinic, Harvard Law School, Cambridge*

Dana Montalto, Esq., *Veterans Legal Clinic, Harvard Law School, Cambridge*

Scott Pitta, Esq., *Office of the Veteran Advocate, Commonwealth of Massachusetts*

5. Tax Benefits for Massachusetts Families

This program explores tax credits available to low-income individuals and families, including pandemic-related credits and state renter credits, while highlighting free tax preparation resources in the Commonwealth. It is ideal for human services professionals, legal aid workers, tax volunteers, and advocates for vulnerable populations.

Faculty

Luz A. Arevalo, Esq., *Greater Boston Legal Services, Boston, Chair*

Michael Carballeira, *Director, Collections Contact Center, Department of Revenue, Commonwealth of Massachusetts*

Angela Divaris, Esq., *Greater Boston Legal Services, Boston*

Mireille Themo Eastman, Esq., *Legal Division, Department of Revenue, Commonwealth of Massachusetts*

Mel Jiganti, Esq., *Northeast Justice Center, Lynn*

Audrey A. Patten, Esq., *Harvard Law School, Cambridge*

6. Tenants' Rights

This training is for community and lay advocates, mediators, housing and legal advocates, and others interested in gaining a better understanding of tenants' rights in Massachusetts. The training focuses on evictions, getting repairs made, rents, and housing discrimination. While the eviction process part of the program applies to all tenants, the training focuses primarily on rights of tenants in private housing. Materials include [*Legal Tactics: Tenants' Rights in Massachusetts*](#).

Faculty

Annette R. Duke, Esq., *Massachusetts Law Reform Institute, Boston, Chair*

7. Unemployment Insurance

Unemployment insurance (UI) is a critical safety net during periods of joblessness. This seminar provides you with the expertise you need to understand the UI system and to help your clients get the UI benefits to which they are legally entitled. Our expert panel guides you through the entire UI system from eligibility criteria to the appeals process. Unemployed workers often cannot afford to retain professional services in pursuing their claims, so if you are a non-legal services attorney, you can register to assist someone in need of help, and in doing so, qualify for reduced tuition. Training materials include the [*Unemployment Advocacy Guide: An Advocate's Guide to Unemployment in Massachusetts*](#). This training is co-sponsored by Massachusetts Law Reform Institute, Greater Boston Legal Services, the Volunteer Lawyers Project, and the Labor and Employment Section of the Massachusetts Bar Association.

Faculty

Jason Salgado, Esq., *Greater Boston Legal Services, Boston, Chair*

Stephanie Herron Rice, Esq., *Greater Boston Legal Services, Boston*

Emma G. Hornsby, Esq., *Greater Boston Legal Services, Boston*

Isabel Lickey, *Greater Boston Legal Services, Boston*

Rory C. Macaneney, Esq., *Community Legal Aid / Worcester County, Fitchburg*

Michael J. Morelli, *Community Legal Aid / Berkshire County, Pittsfield*

Melissa A. Pomfred, Esq., *Pomfred Law Offices, PLLC, Franklin*

Enock Rodriguez, *Greater Boston Legal Services, Boston*

Hannah Morgan Yasuko Tanabe, Esq., *Greater Boston Legal Services, Boston*

Sandra Tavaréz, *Greater Boston Legal Services, Boston*

◀Additional Programs Available On Demand▶

Visit www.mcle.org/main/MLRI

Mock Trial of a BSEA Hearing

Strategies and techniques for presenting and defending a case before the BSEA

Hear the expert panel simulate key portions of a Bureau of Special Education Appeals (BSEA) Hearing; the fact pattern features a student with disabilities, and whether the school district can appropriately meet her needs within the district's program.

Parents are alleging that, in spite of years of services within the district's program, their daughter is failing to make educational progress which, in turn, impacts her social and emotional development. Consequently, parents are seeking placement at an approved private special education school. The district believes that it is offering an appropriate program in the least restrictive environment and that placement in an out-of-district private school is both unnecessary and violates the Individuals with Disabilities Education Act's (IDEA)'mandate of educating a child in the least restrictive environment.

Observe highly experienced attorneys as they frame key aspects of the case, discuss strategy, assemble exhibits, and present the case. And get the hearing officer's perspective on what styles, techniques, and strategies are effective—along with a discussion of what “to do” and what “not to do.”

Agenda

- Summary of Key IDEA Legal Standards Relating to Placement Cases
- Framing the Hearing Request and Understanding the Mechanics of the Hearing Process
- The Pre-Hearing Conference
- Key Issues and Samples of Settlement Agreements
- Organizing the Case and Preparing Witnesses
- The Strategy of and Effective Opening Statements
- The Strategy of and Mock Direct and Cross Examination of a Witnesses
- The Strategy of and Effective Closing Arguments
- “Ask the Experts” Q&A Session

Faculty

Alisia E. St. Florian, Esq., *Murphy, Hesse, Toomey & Lehane LLP, Quincy*, Chair

Lillian E. Wong, Esq., *Wong & Boscarine LLC, Topsfield*

Paige L. Tobin, Esq., *Murphy, Lamere & Murphy, PC, Braintree*

Rosa I. Figueroa, Esq., *Hearing Officer, Bureau of Special Education Appeals, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, May 14, 2025

2:00 pm–5:00 pm

Program # 2250220WBC

REBROADCAST

Thursday, May 29, 2025

1:00 pm–4:00 pm

Program # 2250220RB1

REBROADCAST

Friday, June 6, 2025

9:00 am–12:00 pm

Program # 2250220RB2

ON DEMAND WEBCAST

View after Friday, June 6, 2025

Program # 2250220WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Special Education Law in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Learn more at www.mcle.org

Paid Family & Medical Leave Benefits Roadmap for Non-Attorney Advocates

Maximizing benefits and protections

As of 2021, Massachusetts has fully implemented its Paid Family and Medical Leave (PFML) program, providing workers wage replacement benefits when they have to remain out of work because of their own serious health condition, to care for a family member, or to bond with a newborn or newly-adopted child. By enabling workers to afford to take time away from work under these circumstances, these critical benefits improve health outcomes for workers and the public as a whole, while also improving early childhood development outcomes for children.

Join our experts for an overview of the benefits and protections available to workers under the PFML law, tips regarding the application and appeals process, and a discussion of unresolved legal questions with respect to these benefits.

Agenda

- Overview of PFML Benefits and Protection
- Interaction with Other Programs and Benefits
- Application Process and Tips
- Common Denials and Grounds for Appeal
- Dealing with Employer Retaliation and Interference
- “Ask the Experts” Q&A Session

Faculty

Jason Salgado, Esq., *Greater Boston Legal Services, Boston*, Chair
Stephanie Herron Rice, Esq., *Greater Boston Legal Services, Boston*
David J. McKenna, Esq., *Greater Boston Legal Services, Boston*
Enock Rodriguez, *Greater Boston Legal Services, Boston*
Sandra Tavaréz, *Greater Boston Legal Services, Boston*

Dates & Locations

Register at www.mcle.org

BOSTON

Wednesday, June 25, 2025
10:00 am–12:00 pm
MCLE Conference Center
10 Winter Place, via Winter Street
Program # 2250225P01

LIVE WEBCAST

Wednesday, June 25, 2025
10:00 am–12:00 pm
Program # 2250225WBC

REBROADCAST

Thursday, July 10, 2025
2:00 pm–4:00 pm
Program # 2250225RB1

REBROADCAST

Friday, July 18, 2025
12:00 pm–2:00 pm
Program # 2250225RB2

ON DEMAND WEBCAST

View after Friday, July 18, 2025
Program # 2250225WBA

Tuition *(includes written materials)*

- \$35 Legal Services Lawyers and Non-Lawyer Advocates
- \$125 All Others
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

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- Transcript & videorecording emailed 2 weeks post-program

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for instant access to this program and everything else MCLE offers online.
Learn more at www.mcle.org

Representing Clients in the LGBTQAI+ Community

The intersection of the practice of law and cultural competency

This newly-created program aims to help practitioners improve their ability to attract, engage, and advocate on behalf of members of the LGBTQAI+ community. Practitioners learn how to effectively work with members of this community by understanding some of the unique and nuanced needs that present. We discuss language and terminology and other cultural/societal changing norms that are important to understand when representing members of this community.

Agenda

- **Understanding Terminology:** How members of this community may prefer to be referred to and other potential landmine issues related to unique gender identity and sexual orientation
- **“Hot Button” Issues in the Community:** Looking at broader challenges happening locally, nationally, and internationally
- **Unique Technical Legal Issues Common in the Community and How to Effectively Represent Clients Who Face these Issues**
 - Estate Planning Nuances for GLBTQIA+ individuals and couples
 - Adoption and Parentage
 - Prenuptial and Postnuptial Planning
 - Custody, De Facto Custody, and Parenting Plans Under Current Case Law
 - Disposition of Remains After Death and the Statutory Priority of Next of Kin

Faculty

Lisa M. Cukier, Esq., *Rubin and Rudman LLP, Boston*, Cochair

Scott E. Squillace, Esq., *Squillace & Associates, PC, Boston*, Cochair

Hon. Thomas J. Barbar, *Associate Justice, Probate and Family Court, Commonwealth of Massachusetts*

Mason J. Dunn, Esq., *Director of Education and Research, MA LGBT Chamber of Commerce, Boston*

Katherine Triantafillou, Esq., *Squillace & Associates, PC, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, June 11, 2025

3:00 pm–5:00 pm

Program # 2250151WBC

REBROADCAST

Thursday, June 26, 2025

10:00 am–12:00 pm

Program # 2250151RB1

REBROADCAST

Monday, July 7, 2025

12:00 pm–2:00 pm

Program # 2250151RB2

ON DEMAND WEBCAST

View after Monday, July 7, 2025

Program # 2250151WBA

Tuition *(includes written materials)*

- FREE

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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for instant access to this program and everything else MCLE offers online.

Learn more at www.mcle.org

Service & Assistance Animals & the Law

Overview of the laws governing housing, employment, transportation, and public accommodations

People with disabilities rely on service and assistance animals to perform a variety of tasks: assist with everyday functions like walking and retrieving objects; alert an individual to sights, sounds, and dangers; alert people with diabetes of an oncoming hypoglycemic or hyperglycemic event and the need to take medication; and provide emotional support, comfort, and companionship.

Current federal and state laws create an assortment of rules and regulations which can be difficult to untangle depending on many different factors, such as the species of animal, the tasks it performs, the training it has received—if any at all—and the location in which an individual seeks to rely on the animal. The result can be confusing for attorneys and their clients, and it can lead to otherwise avoidable lawsuits and expenses.

This seminar helps attorneys understand the differing requirements, whether in an employment or housing setting, a place of public accommodation (such as a store, restaurant, or other business), a public building (such as city hall or a town library), or various modes of transportation. The faculty provides vital instruction and guidance on what you need to know to advise clients, whether they are individuals who rely on service or assistance animals, or public and private entities that are required to comply with civil rights laws.

Agenda

- Federal and State Laws Regarding Individuals with Disabilities and Reasonable Accommodation
- Analysis of Different Types of Service and Assistance Animals, the Training They Receive, and the Functions They Provide
- ADA Title II & ADA Title III: Public Entities and Public Accommodations
- FHA: Housing
- Rules for Employment, Housing, and Transportation
- Discussion of Service Animals in Training
- Case Law Overview
- Interactive Hypotheticals
- Best Practices for Businesses, Employers, Transportation Providers, and Housing Providers
- Discussion of Real Life: Experience Using a Service Dog and the Effects of Discrimination
- “Ask the Experts” Q&A Session

Faculty

Peter M. Mimmo, Esq., *Massachusetts Commission Against Discrimination, Commonwealth of Massachusetts*, Chair

Matthew W. Gaines, Esq., *Marcus, Errico, Emmer & Brooks, PC, Braintree*

Thomas P. Murphy, Esq., *Supervising Attorney, Disability Law Center, Inc., Northampton*

Kate Thurman, *Deputy Director, Cambridge Commission for Persons with Disabilities (CCPD); Assistant ADA Coordinator, City of Cambridge*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, March 24, 2025

2:00 pm–5:00 pm

Program # 2250216WBC

REBROADCAST

Tuesday, April 8, 2025

9:00 am–12:00 pm

Program # 2250216RB1

REBROADCAST

Wednesday, April 16, 2025

1:00 pm–4:00 pm

Program # 2250216RB2

ON DEMAND WEBCAST

View after Wednesday, April 16, 2025

Program # 2250216WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Legal Rights of Individuals with Disabilities ebook, plus speaker materials

- E-materials link emailed upon registration
 - Transcript & videorecording emailed 2 weeks post-program
-

CLE Credits

Earn up to 3 CLE credits

Tax Title Foreclosure in Massachusetts

Changes resulting from the enactment of legislation as a result of the U.S. Supreme Court decision on tax foreclosure and collection in Massachusetts

Get insight into the ramifications of the May 23, 2023, U.S. Supreme Court decision in *Tyler v. Hennepin County*, 598 U.S. 631 (2023), on tax collection in the Commonwealth. Hear the faculty discuss the Supreme Court's holding in the *Tyler* case, which prompted changes to the tax title foreclosure procedures in Massachusetts. The faculty discuss enacted amendments to Chapter 60, compare them with the prior versions of the statute, and discuss how the changes will impact tax foreclosures.

Agenda

- Background and History of Tax Foreclosure in the Commonwealth of Massachusetts
- *Tyler v. Hennepin County*
- Enacted Amendments to G.L. c. 60
- Comparison of Tax Foreclosure under Prior Version of G.L. c. 60 with New Practice
- "Ask the Experts" Q&A Session

Faculty

John D. Finnegan, Esq., *Hill Law, Boston*

Kendra Kinscherf, Esq., *Assistant Attorney General and Senior Land Use Counsel, Office of Massachusetts Attorney General, Commonwealth of Massachusetts*

Matthew J. Thomas, Esq., *Law Office of Matthew J. Thomas, New Bedford*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, March 26, 2025

9:30 am–11:30 am

Program # 2250215WBC

REBROADCAST

Thursday, April 10, 2025

2:00 pm–4:00 pm

Program # 2250215RB1

REBROADCAST

Friday, April 18, 2025

12:00 pm–2:00 pm

Program # 2250215RB2

ON DEMAND WEBCAST

View after Friday, April 18, 2025

Program # 2250215WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

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Writing to Win: Persuasive Drafting

Transforming serviceable writing into incisive advocacy

Good legal writing is good writing, and good writing is clear, well-organized, and direct. The best legal writing can persuade a court even before the motion hearing or the appellate oral argument. This can be true in trial courts as well as appellate courts. Disciplined writing makes the job of the reader easy, and makes a memorandum or brief more persuasive.

Join three experienced drafters of appellate and trial briefs and motions as we look at how to transform serviceable writing that merely states the writer's position into incisive advocacy that persuades the reader.

Agenda

- How to Make Briefs and Trial Court Memoranda Shorter, More Concise, and More Persuasive
- How to Organize Legal Documents for Greater Readability
- How to Use the Legal Standard as a Tool for Advocacy

Faculty

Kevin J. Powers, Esq., *Law Office of Kevin J. Powers, Mansfield, Chair*

Richard M.W. Bauer, Esq., *National Consumer Law Center Inc (NCLC), Boston*

Dana A. Curhan, Esq., *Curhan Law Office, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, July 1, 2025

10:00 am–12:00 pm

Program # 2250221WBC

REBROADCAST

Wednesday, July 16, 2025

12:00 pm–2:00 pm

Program # 2250221RB1

REBROADCAST

Thursday, July 24, 2025

2:00 pm–4:00 pm

Program # 2250221RB2

ON DEMAND WEBCAST

View after Thursday, July 24, 2025

Program # 2250221WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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Materials

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Best Billing Practices & Tools

Knowledge and strategies for efficient and effective billing

In today's fast-paced legal environment, accurate billing is not just a financial necessity but also a reflection of professionalism and transparency. This program covers essential billing practices, including how to track time efficiently, manage client expectations, and avoid common pitfalls. Participants learn how to streamline their billing processes, improve client satisfaction, and ensure compliance with ethical guidelines. With a focus on both traditional and modern practices, this session provides valuable insights into optimizing timekeeping, invoicing, and payment collection strategies.

We discuss the main types of fees that lawyers typically charge, i.e., hourly, flat, and contingent, and how they apply to different types of cases. We also discuss best practices for drafting fee agreements and how to track tracking time and create time entries for client invoices. We examine some strategies for managing client expectations and how to effectively implement them into your practice.

Finally, we look at the latest billing tools, emphasizing those that integrate both active and passive time tracking systems. Active time tracking tools allow attorneys to log billable hours manually as they work, while passive systems automatically capture time spent on tasks and communications, ensuring no billable minute is overlooked. By understanding the strengths and limitations of each method, participants gain the skills to select and implement the most appropriate billing tools for their practices. We also examine how to use these tools to increase accuracy, reduce administrative burdens, and maintain ethical billing standards—ultimately boosting profitability and client trust.

Agenda

- Main Types of Fees That Lawyers Charge
- Ethical Considerations For Fee Agreements and Billing Practices
- Efficient Time Tracking Techniques
- Best Billing Practices
- Overview of Billing Tools

Faculty

Sean T. Sullivan, Esq., *Sullivan Law Group, LLC, Boston*, Chair

Christopher K. Sweeney, Esq., *Conn Kavanaugh Rosenthal Peisch & Ford, LLP*

Laura L. Keeler, *Law Practice Tech Specialist, Lawyers Concerned for Lawyers (LCL | MassLOMAP), Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, April 15, 2025

10:00 am–12:00 pm

Program # 2250231WBC

REBROADCAST

Wednesday, April 30, 2025

12:00 pm–2:00 pm

Program # 2250231RB1

REBROADCAST

Thursday, May 8, 2025

2:00 pm–4:00 pm

Program # 2250231RB2

ON DEMAND WEBCAST

View after Thursday, May 8, 2025

Program # 2250231WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

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Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Checklist for a Successful Solo Practice

Hanging a shingle and reaping the rewards

The solo practitioner has endless things to figure out and juggle each and every day. By being very intentional and strategic, the solo attorney can set up and run a client-centered solo practice that is both efficient and profitable.

Every solo attorney wears multiple hats, balancing both legal and business roles to build and sustain a practice. This path requires resilience, self-discipline, and the ability to navigate varied tasks—from client acquisition and case management to financial planning and ethical compliance. Without the support of a larger firm, solo attorneys must develop strong time management skills and leverage technology effectively to stay competitive. Despite the challenges, solo practice offers unique rewards, including greater flexibility, autonomy in decision-making, and the ability to shape a practice that aligns with personal values and professional goals.

The program starts off by looking at your mindset and the importance of a strong foundation when defining your practice. We discuss office setup and technology and financial management and billing. You want the right tools and best practices for invoicing when you get started. We look at marketing and growing your firm. Finally, we look at client communication and the importance of work-life balance.

Agenda

- Mindset
- Building a Strong Foundation
- Office Setup and Technology
- Financial Management and Billing
- Marketing and Client Acquisition
- Client Communication and Management
- Self-Care and Work-Life Balance
- “Ask the Experts” Q&A Session

Faculty

Christopher F. Earley, Esq., *Law Office of Christopher Earley, Boston*, Chair

Lindsey E. Egan, Esq., *Egan Law Center, Manchester-by-the-Sea*

Melissa A. Levine-Piro, Esq., *Hera Law Group, Maynard*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, March 5, 2025

3:00 pm–5:00 pm

Program # 2250230WBC

REBROADCAST

Thursday, March 20, 2025

12:00 pm–2:00 pm

Program # 2250230RB1

REBROADCAST

Friday, March 28, 2025

10:00 am–12:00 pm

Program # 2250230RB2

ON DEMAND WEBCAST

View after Friday, March 28, 2025

Program # 2250230WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Hanging Your Shingle: Starting and Operating a Solo or Small Firm Practice ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



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Managing Your Emotions & the Way You Practice in the Face of Incivility

Keeping calm and carrying on

The practice of law often involves high volume, high stakes, and high emotions. These stressful components of practice can create pressures on attorneys to act in ways that amplify hostility in an already adversarial process or perhaps unknowingly run afoul of ethical responsibilities. Join us for a review of applicable ethics rules, common missteps that could result in disciplinary action, and tips for tackling incivility day to day from colleagues and clients.

Agenda

- Highlights from the Massachusetts Rules of Professional Conduct
- Discussion of Ethical Mistakes That Could Result in Disciplinary Action
- How to Neutralize Hostility from Opposing Counsel or Even Your Own Client
- Consideration of What Zealous Advocacy Means

Faculty

Stephen A. MacKenzie, Esq., *Fitch Law Partners LLP, Boston*

Kelly A. Schwartz, Esq., *Fitch Law Partners LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, April 14, 2025

12:00 pm–1:00 pm

Program # 2250234WBC

REBROADCAST

Tuesday, April 29, 2025

10:00 am–11:00 am

Program # 2250234RB1

REBROADCAST

Wednesday, May 7, 2025

2:00 pm–3:00 pm

Program # 2250234RB2

ON DEMAND WEBCAST

View after Wednesday, May 7, 2025

Program # 2250234WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

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Including up to .5 ethics credit



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Mindfulness & Self-Compassion for Lawyers

Half-day, intensive immersion into the science and practice of mindfulness and self-compassion

Turn over a new leaf with tools and strategies that can improve your life and cultivate greater resilience, self-kindness, focus, and well-being.

In this half-day workshop, you hear about mindfulness and self-compassion and how it relates to law firms, legal services organizations, judges, and law students. You have the opportunity to experience various types of mindfulness and self-compassion practices, both formal and informal, and learn how to integrate them into your life and work so you can be more present, focused, balanced, and resilient.

Mindfulness provides new ways to respond to the inherent complexities of a busy and fast-paced career, and supports people in living life more fully, with greater ease and joy.

Agenda

- The Science and Benefits of Mindfulness and Self-Compassion
- The Lawyer Brain and Why Mindfulness Is Important for the Legal Profession
- The Practice of Mindfulness and Self-Compassion
- Interpersonal Mindfulness (Clients, Colleagues, Adversaries, and All Relationships)
- Mindfulness and Competence
- Integrating Mindfulness and Self-Compassion into Busy Lives
- Guided Mindfulness and Self-Compassion Experiences
- How to Incorporate Mindfulness into Daily Life—Panel of Legal Industry Practitioners
- Practice Examples of Mindfulness in Action in Legal Situations—Panel of Legal Industry Practitioners
- “Ask the Experts” Q&A Session

Faculty

Tracey Meyers, *PsyD.*, *Lawyers Concerned for Lawyers (LCL | MassLOMAP)*, Boston, Chair

Nina Farber, *ASP Director*, *Boston College Law School*, Newton Centre

Dates & Locations

Register at www.mcle.org

LIVE WEBCAST

Thursday, April 10, 2025

12:30 pm–4:30 pm

Program # 2250229WBC

REBROADCAST

Friday, April 25, 2025

9:30 pm–1:30 pm

Program # 2250229RB1

REBROADCAST

Monday, May 5, 2025

12:30 pm–4:30 pm

Program # 2250229RB2

ON DEMAND WEBCAST

View after Monday, May 5, 2025

Program # 2250229WBA

Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Members
- \$72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Navigating Pro Se Adversaries

A litigator's toolkit for successful case management and resolution with pro se litigants

The steep rise of pro se litigants—individuals who seek to represent themselves in court—forces lawyers to adjust their litigation approaches to account for the pro se litigant's general unfamiliarity with court procedure, filings, discovery, and evidentiary rules. A good lawyer will make crucial changes to their strategy, including introductions, service, communications, presentation in court, and finalization of agreements.

Join our expert as we dive into key differences between litigation against a represented party and pro se litigant, and adjustments the lawyer may need to make to ensure the case moves smoothly and the client's expectations are managed.

Agenda

- Brief Introduction to the Pro Se Litigant
- First Contact: Introducing Yourself to the Pro Se Litigant
- Best Ways to Formally Communicate with Pro Se Litigants and Serve Documentation
- Litigation Against Pro Se Litigants—Exploring the Additional Steps Required
- The Lawyer's Role: Adjustments to Style and Tips for Entering into an Agreement and/or Trying the Case Against a Pro Se Litigant
- Managing Client Expectations Before, During, and After the Case
- "Ask the Expert" Q&A Session

Faculty

Grace C. Roessler, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, May 13, 2025
3:00 pm–4:30 pm
Program # 2250268WBC

REBROADCAST

Wednesday, May 28, 2025
12:00 pm–1:30 pm
Program # 2250268RB1

REBROADCAST

Thursday, June 5, 2025
10:00 am–11:30 am
Program # 2250268RB2

ON DEMAND WEBCAST

View after Thursday, June 5, 2025
Program # 2250268WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1.5 CLE credits



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Practical Path to Downsizing Your Practice & Hours

When less is more

For lawyers considering retirement or seeking a better work-life balance, downsizing a practice can be a practical solution. This program provides a roadmap for evaluating and reducing your caseload, understanding ethical obligations under the Massachusetts Rules of Professional Conduct, and planning a manageable transition. You will learn the essential steps, considerations, and timing for downsizing while ensuring ethical compliance and maintaining quality client service.

By the end of the program, participants will understand what it means to downsize a legal practice, why it may be the right choice, when to initiate the process, and how to execute a downsizing plan effectively and ethically.

Agenda

- What & Why: Understanding Downsizing
- When: Timing the Transition
- How: Steps to Downsizing

Faculty

Luz A. Carrion, Esq., *Lawyers Concerned for Lawyers (LCL | MassLOMAP)*, Chair

Michelle R. Yu, Esq., *Legal Program Manager, Office of the General Counsel, Massachusetts Board of Bar Overseers, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, July 8, 2025

12:00 pm–1:00 pm

Program # 2250233WBC

REBROADCAST

Wednesday, July 23, 2025

10:00 am–11:00 am

Program # 2250233RB1

REBROADCAST

Thursday, July 31, 2025

2:00 pm–3:00 pm

Program # 2250233RB2

ON DEMAND WEBCAST

View after Thursday, July 31, 2025

Program # 2250233WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1 CLE credit



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Learn more at www.mcle.org

Spotting Clients Whose Business You Should Decline

Key approaches and techniques for empowering counsel to decline potential clients when it may be necessary to do so

Client reach, growth, and satisfaction are foundational elements in operating a successful law practice. But practice growth is challenging and often brings on a daunting decision: Should I sign on with this client or not?

Counsel, of all fields, face unique ethical issues when evaluating a case or client for representation and strengthening this decision-making process is vital to the success of your practice. If you have trouble turning down potential clients, then this program is for you.

In this new program we discuss how to do a thorough intake, how to evaluate if a potential client is right for you, reasons for turning down a potential client, and how to ethically turn down a potential client. This program brings together practitioners—new and seasoned—using real-world hypotheticals to illustrate how to avoid such difficulties.

Agenda

- The Importance of Conducting a Thorough Intake
- Process of Evaluating Potential Client and Case
- Reasons Why You May Want to Decline a Case/Client
- Ethical Considerations
- How to Decline a Case/Client

Faculty

Melissa A. Levine-Piro, Esq., *Hera Law Group, Maynard*, Chair
Paul M. Glickman, Esq., *Glickman Turley LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, May 6, 2025
12:00 pm–1:00 pm
Program # 2250228WBC

REBROADCAST

Wednesday, May 21, 2025
10:00 am–11:00 am
Program # 2250228RB1

REBROADCAST

Thursday, May 29, 2025
2:00 pm–3:00 pm
Program # 2250228RB2

ON DEMAND WEBCAST

View after Thursday, May 29, 2025
Program # 2250228WBA

Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Members
- \$72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 1 CLE credits
Including up to .5 ethics credit



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What to Do with Your Law Degree When Practice Does Not Beckon

The road not taken

Law school presents a clear and simple path: graduate, take the bar, become a lawyer.

Of course, that's not the *only* path; just because you have a law degree, that doesn't mean you have to use it to practice law. Both your law degree and your legal experience can combine to offer you alternative pathways into legal-related or non-legal fields that nonetheless require some of the transferable skills that are also valuable in traditional law practice. Neither is this a new phenomenon: for centuries, attorneys have taken their law degrees and achieved success in other fields.

Join our experts as we consider what alternate career paths are open for lawyers now, and discuss how, why, and when to make the move.

Agenda

- Story Time! Why Real-Life Lawyers Decided to Leave the Practice of Law to Do Something Else Entirely
- Alternative Career Paths Open to Lawyers
- How to Choose an Alt-Legal Career
- How to Choose a Non-Legal Career
- "Ask the Experts" Q&A Session

Faculty

Jared D. Correia, Esq., *Founder & CEO, Red Cave Law Firm Consulting, Beverly, Chair*

Rachel Clar, Esq., *Founder and CEO, Interconnected Us, Rochester, NY*

Nicole A. Clark, Esq., *Trellis Research, Inc., Los Angeles, CA*

Marisa Portuondo, Esq., *Portuondo Law Firm, P.A., Miami, FL*

Gyi Tsakalakakis, Esq., *AttorneySync, Chicago, IL*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, March 12, 2025

10:00 am–11:00 am

Program # 2250227WBC

REBROADCAST

Thursday, March 27, 2025

2:00 pm–3:00 pm

Program # 2250227RB1

REBROADCAST

Friday, April 4, 2025

12:00 pm–1:00 pm

Program # 2250227RB2

ON DEMAND WEBCAST

View after Friday, April 4, 2025

Program # 2250227WBA

Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Members
- \$72.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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26th Annual Environmental, Land Use & Energy Law Conference 2025

Comprehensive coverage and updates

Learn what happened in federal and state legislatures, agencies, and courts, and in Massachusetts municipal law. Find out what you need to know for your clients and career—and catch up on what you missed this year.

The panelists survey the critical new developments in each of the major fields of environmental law, energy law, land use, and related litigation. New this year is additional attention to the rapidly growing area of energy law, as well as several changes in local housing law and zoning. For those who have attended in prior years, attending annually refreshes your knowledge and helps keep you up to date on the latest developments. And for those new to the *Conference*, attending is a great way to broaden and deepen your knowledge by learning from experts who have been tracking the trends, cases, and statutory changes.

Agenda

- **Survey of Cases: Significant Jurisprudence for Massachusetts Attorneys**
 - Environmental Permitting Litigation, Subdivision and Zoning Cases, and MassDEP Administrative, Home Rule, Certiorari, and 40B Cases
- **Government Updates: U.S. Environmental Protection Agency and Massachusetts Department of Environmental Protection**
- **Innovative Initiatives to Address Climate Change**
 - Featured Speaker: Aladdine D. Joroff, Esq., *Deputy Director of Climate Policy, Commonwealth of Massachusetts*
- **Significant Evolving Practice Areas**
 - 21E and Brownfields; Article 97 and Open Space Act; Municipal Land Use Law Trends; and Affordable Homes Act
- **Energy Law: Incentives, Standards, and Siting Issues for Clean Energy Projects; Representation Before Administrative Agencies**

Faculty

Pamela D. Harvey, Esq., *6fcc_ 'bY Cochair*; Gregor I. McGregor, Esq., *A WfYcf' @Y YF/ ' Ghj Ybgz' D7Z6cgrb*, Cochair; Matthew J. Connolly, Esq., *Nutter McClennen & Fish LLP, Boston*; Carl F. Dierker, Esq., *U.S. Environmental Protection Agency, Region 1, Boston*; Kurt Gaertner, *Smart Growth/Smart Energy, Executive Office of Energy and Environmental Affairs, Commonwealth of Massachusetts*; Beth A. Goldstein, Esq., *Sherin and Lodgen LLP, Boston*; Bonnie Heiple, Esq., *Commissioner, Department of Environmental Protection, Commonwealth of Massachusetts*; Aladdine D. Joroff, Esq., *Deputy Director of Climate Policy, Commonwealth of Massachusetts*; Jonathan S. Klavens, Esq., *Klavens Law Group, PC, Boston*; Michael Koehler, Esq., *Keegan Werlin LLP, Boston*; Valerie A. Moore, Esq., *Nutter McClennen & Fish LLP, Boston*; Michael K. Murray, Esq., *Nixon Peabody LLP, Boston*; Richard A. Nylan, Jr., Esq., *Lynch, DeSimone & Nylan LLP, Boston*; Kathleen M. O'Donnell, Esq., *Law Office of Kathleen M. O'Donnell, Milton*; Lucas Rogers, Esq., *Senior Counsel, Department of Environmental Protection, Commonwealth of Massachusetts*; Jonathan M. Silverstein, Esq., *Blatman, Bobrowski, Haverty & Silverstein LLC, Concord*



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Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, March 27, 2025

9:00 am–5:00 pm

Program # 2250178WBC

REBROADCAST CC

Friday, April 11, 2025

9:00 am–5:00 pm

Program # 2250178RB1

REBROADCAST CC

Tuesday, April 22, 2025

9:00 am–5:00 pm

Program # 2250178RB2

ON DEMAND WEBCAST CC

View after Tuesday, April 22, 2025

Program # 2250178WBA

Tuition (includes written materials)

- \$275
- \$247.50 MCLE Members
- \$137.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

Massachusetts Environmental Law and Massachusetts Real Estate Law Sourcebook & Citorator ebooks, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 6.5 CLE credits



ONLINE CONFERENCE

27th Annual Real Estate Law Conference 2025

Best practices for emerging issues in real estate law

Your time is valuable. Let MCLE's expert panelists quickly bring you up to speed on the latest issues in real estate law—and the best practices for handling them. As always, the *Conference* offers valuable insight for both experienced and newly minted practitioners.

Featured Panel: The condominium form of real property ownership is ubiquitous. Every conveyancer and closing lawyer deals regularly with the collateralization of real property interests created by the submission of land to condominium status. The existence and validity of those collateral interests can typically be confirmed by a review of record title. However, the physical condition of the common area has a potential impact on the value, and even continued existence of that collateral, particularly in associations that are decades old and that may have deferred maintenance. The quasi-governmental entities that insure mortgages, as well as buyers, lenders, and even unit owners, are paying closer attention to those effects. The panel explores how those off-record, on-the-ground, conditions are impacting and will continue to impact conveyancing in this area.

Agenda

- 9:30 am–9:35 am Welcome and Introduction
- 9:35 am–10:45 am Recent Case Law Developments in Massachusetts Real Estate Law
- 10:45 am–10:50 am Break
- 10:50 am–12:00 pm MBTA Communities Law: The On-Going Challenges
- 12:00 pm–12:05 pm Break
- 12:05 pm–1:05 pm The State of the Real Estate Market: Boston & Beyond
- 1:05 pm–2:00 pm Lunch Break
- 2:00 pm–3:10 pm Aging Condominium Infrastructure: Implications for Conveyancing
- 3:10 pm–3:15 pm Break
- 3:15 pm–4:25 pm The New IOLTA Rule: Compliance and Implementation
- 4:25 pm–4:30 pm “Ask the Experts” Q&A Session

Faculty

Thomas O. Moriarty, Esq., *Moriarty Bielan & Malloy LLC, Quincy*, Chair
Kimberly A. Bielan, Esq., *Moriarty Bielan & Malloy LLC, Quincy*
Rachel Bliss, *Vice President, Hughes Marino, Boston*
Henry J. Dane, Esq., *Dane Brady & Haydon LLP, Concord*
Kathleen M. Heyer, Esq., *Pierce Atwood, Boston*
Stacie A. Kosinski, Esq., *Verrill, Boston*
Hannah McNeil, *Vice President, Hughes Marino, Boston*
Nicholas P. Shapiro, Esq., *Phillips & Angley, Boston*



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Dates & Location

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LIVE WEBCAST

Thursday, March 20, 2025
9:30 am–4:30 pm
Program # 2250185WBC

REBROADCAST CC

Friday, April 4, 2025
9:30 am–4:30 pm
Program # 2250185RB1

REBROADCAST CC

Monday, April 14, 2025
9:30 am–4:30 pm
Program # 2250185RB2

ON DEMAND WEBCAST CC

View after Monday, April 14, 2025
Program # 2250185WBA

Tuition (includes written materials)

- \$275
- \$247.50 MCLE Members
- \$137.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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Materials

Massachusetts Real Estate Law Sourcebook & Cimator ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 6 CLE credits



Affordable Housing Primer

Introduction to affordable housing transactions in Massachusetts

Get insight into structuring, financing, and developing affordable housing in Massachusetts. Understand the roles and responsibilities of the different players involved in closing an affordable housing transaction, including investor's counsel, lender's counsel, and developer's counsel. The panelists explain the stages of development, from structuring and financing a project to closing a transaction and share valuable lessons learned from the trenches. The faculty also review a sample transaction closing checklist and common transaction documents.

Agenda

- Structuring Affordable Housing Projects
- Title and Real Estate Considerations
- Financing Affordable Housing Projects
- Overview of Low-Income Housing Tax Credits and Other Tax Credit Programs
- Review of Key Federal and State Affordable Housing Programs
- Difference Between Market-Rate and Affordable Transactions
- "Ask the Experts" Q&A Session

Faculty

Kurt S. Stiegel, Esq., *Robinson+Cole LLP, Boston*, Chair
Nuryllen D. Aguasvivas, Esq., *Nixon Peabody LLP, Boston*
Colette D. Irving, Esq., *Nolan Sheehan Patten LLP, Boston*
Peter Lubersbane, Esq., *Klein Hornig LLP, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, July 16, 2025

1:00 pm–4:00 pm

Program # 2250184WBC

REBROADCAST

Thursday, July 31, 2025

12:00 pm–3:00 pm

Program # 2250184RB1

REBROADCAST

Friday, August 8, 2025

9:00 am–12:00 pm

Program # 2250184RB2

ON DEMAND WEBCAST

View after Friday, August 8, 2025

Program # 2250184WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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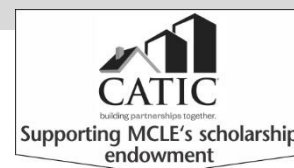
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Materials

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CLE Credits

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Buying a Foreclosed Property

Understand the considerations for representing a purchaser of real property at a foreclosure auction or at a real estate owned (REO) sale

Representing a purchaser of real property at a foreclosure auction or at a real estate owned (REO) sale can be a complicated and voluminous review even for the most seasoned conveyancing attorney. The panel of experts provides a review of the process, statutes, important cases along with perspectives from those who represent the foreclosing mortgagee, the buyer, and what a title insurance company is looking at. The panel helps guide you through the title examination, the off-record documentation gathering, and other relevant questions to ask during the purchase. In addition, the panel discusses the best practices, traps for the unwary and common issues that arise during the acquisition of distressed property. Bring your questions!

Agenda

- Overview
- Relevant Statutes
- Reviewing the Title
- Signing the Contract at the Auction or REO Sale
- Post-Foreclosure Document Review
- Off-Record Documentation
- Key and Recent Cases
- Alternatives to Foreclosure
- "Ask the Experts" Q&A Session

Faculty

Matthew Carbone, Esq., *Sr. Underwriting Counsel, First American Title Insurance Company, Boston, Chair*

Erika J. Hoover, Esq., *Managing Foreclosure Attorney, Korde & Associates, PC, Lowell*

Samuel Grossack, Esq., *Grossack Law Group, PC, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, May 20, 2025

12:00 pm–2:00 pm

Program # 2250194WBC

REBROADCAST

Wednesday, June 4, 2025

9:00 am–11:00 am

Program # 2250194RB1

REBROADCAST

Thursday, June 12, 2025

2:00 pm–4:00 pm

Program # 2250194RB2

ON DEMAND WEBCAST

View after Thursday, June 12, 2025

Program # 2250194WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
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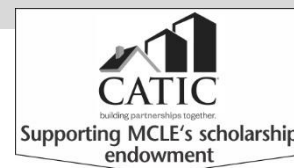
Materials

Massachusetts Mortgages, Foreclosures, and Workouts ebook, plus speaker materials

- E-materials link emailed upon registration
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CLE Credits

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Clearing Common Title Issues

Practical tips for identifying, understanding, and resolving title issues, and insight on when litigation may be required

You found a title issue—now what? This program provides examples of the most common title issues, and guidance to real estate practitioners and closing attorneys for how to handle them. The panelists offer practical tips for identifying, understanding, and resolving title issues, and insight on when litigation may be required. The topics discussed include probate and trust matters, mortgage discharges and assignments, drafting errors, missing interests, registered land, easements, and more. Learn about current and evolving title topics and key tips to avoid thorny traps for the unwary.

Agenda

- Drafting Errors
- Mortgages, Discharges, and Assignments
- Liens and How to Release Them
- Probate and Trust Matters
- Missing Interests
- Easements and Encroachments
- Orders of Conditions
- Subdivisions
- Registered Land

Faculty

Carrie B. Rainen, Esq., *Rainen Law Office, PC, North Andover*, Chair
Karen A. Adamski, Esq., *CATIC, Waltham*
Mary L. Cataudella, Esq., *Touchstone Closing & Escrow LLC, Andover*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Monday, June 9, 2025
12:00 pm–2:00 pm
Program # 2250186WBC

REBROADCAST

Tuesday, June 24, 2025
2:00 pm–4:00 pm
Program # 2250186RB1

REBROADCAST

Wednesday, July 2, 2025
9:00 am–11:00 am
Program # 2250186RB2

ON DEMAND WEBCAST

View after Wednesday, July 2, 2025
Program # 2250186WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
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Materials

Real Estate Title Practice in Massachusetts ebook, plus speaker materials

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Creating Condominiums

Drafting the master deed and operational provisions

Condominiums are “creatures of statute”. They are created pursuant to G.L. c. 183A and are governed by and operate according to their constituent documents. Massachusetts courts have deemed a condominium’s constituent documents to be something more than a contract and, instead, akin to covenants running with the land. As the constituent documents define and create the condominium, provide the operational policies and procedures thereof, and survive as provisions tantamount to covenants running with the land, the importance of drafting quality condominium documents cannot be overstated.

This program provides guidance on drafting well-crafted master deeds and operational provisions for condominiums, including declarations of trusts and/or bylaws. The panel also identifies common pitfalls and traps in condominium document language, the problems caused by such language, and suggestions for remedying these provisions. Finally, attendees learn some of the most common issues that arise in the enforcement of condominium documents and the document language that can assist by providing procedures and resolutions.

Agenda

- Drafting Well-Crafted Condominium Documents
- Avoiding Pitfalls and Traps of Problematic Provisions
- Common Enforcement Issues and the Document Language That Leads to Successful Results for Associations
- “Ask the Experts” Q&A Session

Faculty

Gary M. Daddario, Esq., *Marcus, Errico, Emmer & Brooks, PC, Merrimack, NH*, Chair
 Pamela M. Jonah, Esq., *Marcus, Errico, Emmer & Brooks, PC, Braintree*
 Cameron S. Merrill, Esq., *Merrill & McGeary, Boston*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, May 13, 2025
 1:00 pm–4:00 pm
 Program # 2250181WBC

REBROADCAST

Wednesday, May 28, 2025
 9:00 am–12:00 pm
 Program # 2250181RB1

REBROADCAST

Thursday, June 5, 2025
 11:00 am–2:00 pm
 Program # 2250181RB2

ON DEMAND WEBCAST

View after Thursday, June 5, 2025
 Program # 2250181WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
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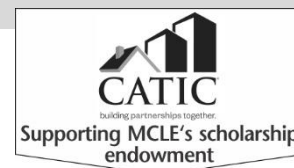
Materials

Massachusetts Condominium Law ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Housing Court Judicial Forum 2025

Meet the judges of the Housing Court

The past few years have changed the procedural landscape of the Housing Court, including changes and updates to scheduling and the manner of conducting hearings. MCLE is pleased to reconvene—for the fourteenth time—the Housing Court Judicial Forum 2025—back by popular request. With regulations and statutes first adopted during the emergency and put into practice since, the Housing Court has continued to adapt to those changes and challenges by being flexible and responsive, including tremendous progress in the use of technology and creative use of scheduling to meet the challenges created by that situation and to address the shifting needs of practitioners and litigants. There are lessons to be learned and improvements to be kept from this challenging time. Additionally, there are changes that are underway, to both process and procedure, that will have real world impact on attorneys who practice in the Housing Court and their clients.

Hear Forum participants engage in a lively discussion of the real-world impact of those changes, including the challenges and opportunities involved. Judges from all divisions of the Housing Court, joined by the chief Justice of the Housing Court, engage in a frank dialogue with attending practitioners and review key issues confronting Housing Court practice today—including discussion of the efficacy of policies and programs currently in place as well as ideas for providing additional access to justice for all litigants.

Under the guidance of two experienced practitioners, the panel also reviews significant developments in regulatory and case law which may affect your practice in the Housing Court.

This Forum offers you a unique opportunity to gain valuable practical insight into judicial discretion in the Housing Court. Attendees have the opportunity to ask the panel questions and hear directly from the judges on how to better prepare and try cases. Don't miss this chance to participate in an important dialogue with members of the Housing Court.

Agenda

- Procedural and Administrative Issues
- Legislative and Regulatory Changes Affecting the Housing Court
- New Developments Regarding Technology and the Housing Court
- Civility in the Housing Court
- Substantive Issues
- Significant Developments in Housing Law, Including the New Eviction Sealing Act
- Tips on Best Practices from the Bench
- “Ask the Housing Court” Q&A Session

Faculty

Catherine F. Downing, Esq., *Downing Van Dyke, PC, Natick*, Cochair; Deena Zakim, Esq., *Greater Boston Legal Services, Boston*, Cochair; Hon. Diana H. Horan, *Chief Justice, Housing Court, Commonwealth of Massachusetts*; Hon. Sergio E. Carvajal, *First Justice, Central Division, Housing Court, Commonwealth of Massachusetts*; Hon. Gustavo del Puerto, *First Justice, Northeast Division, Housing Court, Commonwealth of Massachusetts*; Hon. Jonathan J. Kane, *First Justice, Western Division, Housing Court, Commonwealth of Massachusetts*; Hon. Joseph E. Kelleher III, *First Justice, Eastern Division, Housing Court, Commonwealth of Massachusetts*; Hon. Donna T. Salvidio, *First Justice, Southeast Division, Housing Court, Commonwealth of Massachusetts*; Hon. Neil K. Sherring, *First Justice, Metro-South Division, Housing Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, April 16, 2025
2:00 pm–5:00 pm
Program # 2250180WBC

REBROADCAST

Thursday, May 1, 2025
1:00 pm–4:00 pm
Program # 2250180RB1

REBROADCAST

Friday, May 9, 2025
9:30 am–12:30 pm
Program # 2250180RB2

ON DEMAND WEBCAST

View after Friday, May 9, 2025
Program # 2250180WBA

Tuition *(includes written materials)*

- \$245
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Materials

Residential and Commercial Landlord-Tenant Practice in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

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How Fannie Mae Underwriting Guidelines Impact Condo Sales

Learn about the problems that most often arise for associations and sale parties during the underwriting process for conventional loans on condominium units

Condominium sales are a different creature from most other residential real estate transactions when it comes to obtaining conventional mortgages. Much of the additional headache is largely due to the condominium questionnaire lenders use to verify that a loan will conform to Federal National Mortgage Association (FNMA) guidelines. Revisions to the guidelines in 2021 following the Champlain Towers collapse shook up the questionnaire landscape and caused headaches for unit sellers, unit purchasers, and condominium associations, which continue to linger. Learn more about the problems that most often arise for associations and sale parties during the underwriting process for conventional loans on condominium units.

Agenda

- Basics of Condominium Questionnaires
- Post-Champlain Towers Questionnaire
- Responding to 2021 Condition Questions: The Condominium Association Perspective
- Condominium Insurance Landscape and FNMA Insurance Guidelines
- FNMA "Blacklist"
- Managing the Process with Clients

Faculty

Justin Magsarili, Esq., *Marcus, Errico, Emmer & Brooks, PC, Merrimack, NH*, Chair
Mark S. Einhorn, Esq., *Marcus, Errico, Emmer & Brooks, PC, Braintree*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, March 12, 2025
12:00 pm–1:00 pm
Program # 2250190WBC

REBROADCAST

Thursday, March 27, 2025
3:00 pm–4:00 pm
Program # 2250190RB1

REBROADCAST

Friday, April 4, 2025
9:00 am–10:00 am
Program # 2250190RB2

ON DEMAND WEBCAST

View after Friday, April 4, 2025
Program # 2250190WBA

Tuition *(includes written materials)*

- \$145
- \$130.50 MCLE Members
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Materials

Massachusetts Condominium Law ebook, plus speaker materials

- E-materials link emailed upon registration
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Lawyer's Roadmap to the Land Court

Learn everything you need to know to jumpstart your Land Court practice from two of the court's justices

Attend this webcast for the unique opportunity to meet and hear from two of the court's justices on everything you need to know to begin or expand your practice before the Land Court. This program goes beyond the basics and delivers a detailed rundown of Land Court practice with practical tips for those who want to hone their real estate litigation skills.

The Land Court is the forum of choice for many real estate law practitioners, and this program shows you why. The panelists delve into the court's jurisdiction, explaining its commonalities and divergences with other Trial Court departments. The program examines and explains the inner functions of the court and its unique business units, including the Recorder's Office, the Judge's Lobby, the Administrative Office, the Title Examination Department (tax and registered land), and the Survey Division. The panelists also cover the court's role administering the Commonwealth's registered land system, the tax foreclosure session, and servicemembers' mortgage cases, as well as the much broader, judicially-managed "miscellaneous" cases, which run the gamut of topics, including: mortgage reformation; partition; zoning and subdivision appeals; the permit session; adverse possession; specific performance; easements; restrictive covenants and encumbrances; and many more.

For practitioners looking to begin, expand, or hone their practice before the Land Court, this program provides an invaluable "deep dive" into the court's inner workings. Particular attention is given to how practitioners can leverage the specialized experience and expertise of the court to address their clients' real estate disputes.

Agenda

- The Land Court's Jurisdiction Compared to Other Trial Court Departments
- The Land Court's Court Business Units: The Recorder's Office, Judge's Lobby, Administrative Office, Title Examination Department (Tax and Registered Land), and Survey Division
- The Land Court's Administration of the Commonwealth's Registered Land System
- The Land Court's Unique Case Types, Including: Registration, Confirmation and "Subsequent" Cases; The Tax Foreclosure Session; and Servicemembers Cases
- The Land Court's New In-House Mediation Program
- Practice and Procedure on the Land Court's "Miscellaneous" Docket, and How to Optimize Practice in the Court's Judicially Managed Cases
- "Ask the Experts" Q&A Session

Faculty

Hon. Gordon H. Piper, *Chief Justice, Land Court, Commonwealth of Massachusetts*

Hon. Lauren E. Reznick, *Associate Justice, Land Court, Commonwealth of Massachusetts*



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Dates & Location

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LIVE WEBCAST

Tuesday, April 15, 2025

2:00 pm–5:00 pm

Program # 2250179WBC

REBROADCAST

Wednesday, April 30, 2025

9:00 am–12:00 pm

Program # 2250179RB1

REBROADCAST

Thursday, May 8, 2025

1:00 pm–4:00 pm

Program # 2250179RB2

ON DEMAND WEBCAST

View after Thursday, May 8, 2025

Program # 2250179WBA

Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
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Materials

Litigating Residential Real Estate Disputes in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 3 CLE credits



Marking Up Title Commitments, Eliminating Exceptions & Getting Endorsements

How to skillfully fine-tune a residential and commercial real estate title insurance policy

The ability to facilitate real estate closings and procure title insurance for buyers and lenders is a necessary skill in today's real estate market. Title examination, analysis, risk assessment, and mitigation are all key elements in determining whether and how to insure a transaction, what endorsements may be needed and whether they can be issued, and satisfying the insurer's requirements to obtain the desired title insurance coverage.

This nuts-and-bolts program guides you through the practical aspects of preparing and reviewing a title commitment to producing the final policy with appropriate endorsements to enhance the policy's coverage. Topics include reading and understanding a title report, curing title problems, satisfying requirements, identifying and drafting relevant exceptions, and adding requested coverage to the policy via endorsements, with an emphasis on typical underwriting requirements for common commercial endorsements. The panel features both title insurance underwriting counsel and the lender's counsel perspective. Attorneys and paralegals alike benefit from attending this program.

Agenda

- The Basics of Title Insurance and Policy Options
- The Title Search and Attorney's Title Review
- Preparing the Title Commitment
- Commitment Review in the Residential v. Commercial Transaction
- Common Transactional Requirements and Exceptions
- Satisfying Requirements and Removing Exceptions
- Common Endorsements
- The Pro Forma Policy in a Commercial Transaction
- Issuing the Final Policy
- "Ask the Experts" Q&A Session

Faculty

Jutta R. Deeney, Esq., *Vice President and New England Regional Underwriting Counsel and Senior Underwriter, Stewart Title Guaranty Company, Waltham, Chair*

Amanda S. Eckhoff, Esq., *Robinson + Cole LLP, Boston*

Tracie M. Kester, Esq., *Massachusetts State Underwriting Counsel, and Associate Senior Underwriter, Stewart Title Guaranty Company, Waltham*



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Dates & Location

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LIVE WEBCAST

Monday, April 7, 2025
1:00 pm–4:00 pm
Program # 2250183WBC

REBROADCAST CC

Tuesday, April 22, 2025
9:00 am–12:00 pm
Program # 2250183RB1

REBROADCAST CC

Wednesday, April 30, 2025
12:00 pm–3:00 pm
Program # 2250183RB2

ON DEMAND WEBCAST CC

View after Wednesday, April 30, 2025
Program # 2250183WBA

Tuition (includes written materials)

- \$245
- \$220.50 MCLE Members
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Materials

Real Estate Title Practice in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

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Motion Practice in Housing Court

Learn the strategy and execution of motion practice

Cases are often lost or won based on motion practice, which lives at the center of civil litigation. Don't miss this fast-paced seminar explaining motion practice from the initial filing of the summary process or civil action in the Housing Court through post-trial motions. To be effective, litigators at all experience levels must have a firm grasp on the procedural and substantive issues affecting each potential motion.

Understanding the legal principles and recent developments in the law and court rules is crucial to skillfully evaluating whether to recommend making a contemplated motion—and to making or opposing a motion effectively. Learn how to file motions to strike, motions to dismiss, summary judgment motions, and motions to obtain and preserve evidence, including electronic data. The faculty explain the strategic use of motions in limine before trial, the requirements for requesting or defending temporary restraining orders and injunctive relief, and the nuances of post-trial motions and appellate issues. The panel of experienced practitioners also provide guidance on how to decide whether to file a motion, when to file it, and how to persuasively make and respond to motions—along with tips for effective oral argument. Get valuable insight to hone the motion practice skills necessary to succeed in civil practice in the Housing Court Department.

Agenda

- Motions to Dismiss
- Motions for Summary Judgment
- Motions for Judgment on the Pleadings
- Discovery Motions
- Common Substantive Motions
- Common Procedural Motions
- TRO/PI Motions
- Oppositions to Motions
 - Motions to strike
 - Motions to enlarge time
- Procedural Requirements
- Pre-Trial Motions
- Motions in Limine
- Post-Trial Motions
- Appellate Issues
- Miscellaneous Practical Tips

Faculty

James F. Creed, Jr., Esq., *CreedLaw LLC, Marshfield, Chair*

Lori A. Drayton, Esq., *Drayton Law, PC, Foxboro*

Eloise P. Lawrence, Esq., *Assistant Clinical Professor, Harvard Law School; Faculty Director, Harvard Legal Aid Bureau, Cambridge*



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Dates & Location

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LIVE WEBCAST

Wednesday, March 5, 2025

9:30 am–11:30 am

Program # 2250187WBC

REBROADCAST

Thursday, March 20, 2025

2:00 pm–4:00 pm

Program # 2250187RB1

REBROADCAST

Friday, March 28, 2025

12:00 pm–2:00 pm

Program # 2250187RB1

ON DEMAND WEBCAST

View after Friday, March 28, 2025

Program # 2250187WBA

Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
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Materials

Residential and Commercial Landlord-Tenant Practice in Massachusetts ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

CLE Credits

Earn up to 2 CLE credits



Navigating the Land Registration System in Massachusetts

Fundamentals of handling registered land property titles and surveys

Hear directly from the chief surveyor and chief title examiner of the Land Court as to the practices and procedures under the land registration system in Massachusetts. Whether you are a new practitioner or already familiar with the land registration system, this program provides a practical roadmap as to what to file with the Land Court to process your case and effectively navigate through the court processes.

Agenda

- Overview of the Land Registration System in Massachusetts
- Role of the Survey Division
- "Land Court 2006 Manual of Instructions for the Survey of Lands and Preparation of Plans"
- New: Online Public Access to Survey Division Records
- Overview of Selected "Land Court Guidelines on Registered Land"
- Updates at the Court and Recent Legislation, Including an Amendment to G.L. c. 185, § 52, Changing the Process for Voluntary Withdrawal from Registration, as well as an Amendment to G.L. c. 185, § 114, Involving Corrections to Certificates of Title
- New Forms and Procedures
- Overview as to When to Seek Approval from the Title Examiners or the Survey Division
- Condominium Approvals
- When to File a Complaint Subsequent to Registration (the S-Case), Including Practical Tips on Supporting Documents and Information
- Standing Orders and Memoranda of the Chief Title Examiner
- "Ask the Experts" Q&A Session

Faculty

Christina T. Geaney, Esq., *Chief Title Examiner, Land Court, Commonwealth of Massachusetts*
Stephen T. LaMonica, PLS, PE, *Chief Surveyor, Land Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, March 6, 2025
12:00 pm–2:00 pm
Program # 2250188WBC

REBROADCAST

Friday, March 21, 2025
9:00 am–11:00 am
Program # 2250188RB1

REBROADCAST

Monday, March 31, 2025
2:00 pm–4:00 pm
Program # 2250188RB2

ON DEMAND WEBCAST

View after Monday, March 31, 2025
Program # 2250188WBA

Tuition *(includes written materials)*

- \$175
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Materials

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Obtaining & Blocking Variances

Lawyers' quick guide to the who, what, where, when, and how of variances

The law of zoning variances in Massachusetts arose from the need for flexibility in zoning plans to allow municipalities to avoid unnecessary interference with private property rights and unconstitutional "takings" of land rendered useless by uniform application of zoning requirements.

Understand the statutory requirements for obtaining a variance and how to successfully challenge and/or defend variance decisions.

Agenda

- Variance Uses, Elements, and Burden of Proof
- How Variances Differ from Special Permits
- Exercise and Lapse
- Challenging Variance Decisions
- Defending Variance Decisions

Faculty

Johanna W. Schneider, Esq., *Hemenway & Barnes LLP, Boston*, Cochair

Brian W. Dugdale, Esq., *Goulston & Storrs, Boston*, Cochair

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Wednesday, July 23, 2025

9:30 am–10:30 am

Program # 2250193WBC

REBROADCAST

Thursday, August 7, 2025

3:00 pm–4:00 pm

Program # 2250193RB1

REBROADCAST

Friday, August 15, 2025

12:00 pm–1:00 pm

Program # 2250193RB2

ON DEMAND WEBCAST

View after Friday, August 15, 2025

Program # 2250193WBA

Tuition *(includes written materials)*

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Petitioning to Partition

Logistics, statutory construct, and methods of resolution

Take a deep dive into partition actions. Gain insight into the logistics of commencing a partition matter, the applicable statutory construct, the various methods of resolving a partition action, and the many steps along the way which may be the source of contention. This presentation assists in understanding the roles of the various players in any partition action, including the judge and court-appointed commissioners. The panelists explain how to commence a partition action, the various stages of working through a partition action, and the role of the court and its agents. The panelists also share valuable lessons learned from the trenches.

Agenda

- Partition Actions: Who, What, When, Where, Why, and How
- Statutory Overview
- Pre-filing Considerations
- Sale or Physical Partition
- The Role of a Commissioner
- The Court's View
- "Ask the Experts" Q&A Session

Faculty

Kathleen M. Heyer, Esq., *Pierce Atwood LLP, Boston*, Chair

Christopher A. Cornetta, Esq., *Cornetta Babine LLC, Danvers*

Robert K. Hopkins, Esq., *Phillips & Angley, Boston*

Hon. Jennifer S. D. Roberts (Ret.), *Land Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Tuesday, June 3, 2025

12:00 pm–2:00 pm

Program # 2250192WBC

REBROADCAST

Wednesday, June 18, 2025

1:00 pm–3:00 pm

Program # 2250192RB1

REBROADCAST

Thursday, June 26, 2025

9:00 am–11:00 am

Program # 2250192RB2

ON DEMAND WEBCAST

View after Thursday, June 26, 2025

Program # 2250192WBA

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Pros & Cons of Using Nominee Trusts

Protecting privacy and effectuating estate planning goals involving real estate transfers

Nominee trusts are often used in the context of real estate transfers, primarily to protect the privacy of the parties involved and effectuate estate planning goals. Learn what a nominee trust is and how and why they are used in real estate transfers. Hear the speakers review how nominee trusts are structured and discuss important factors to consider when drafting these types of trusts on behalf of your clients. They also discuss real estate title issues encountered when utilizing nominee trusts, explore the use of trustee certificates as an alternative to recording a nominee trust, and conclude by highlighting some of the basic traps for the unwary when attorneys utilize nominee trusts in their practice.

Agenda

- What Are Nominee Trusts?
- Why and How Are Nominee Trusts Utilized?
- Nuts and Bolts of Drafting Nominee Trusts
- Title Requirements for Real Estate Transfers to a Nominee Trust
- Trustee Certificates
- Traps for the Unwary
- “Ask the Experts” Q&A Session

Faculty

Laurel M. Millette, Esq., *Transitions Law LLC, Concord*

Kristin A. Monaco, Esq., *Nigro, Pettepit & Lucas LLP, Newburyport*

Carrie B. Rainen, Esq., *Rainen Law Office, PC, North Andover*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, May 8, 2025

12:00 pm–1:30 pm

Program #: 2250191WBC

REBROADCAST

Friday, May 23, 2025

9:00 am–10:30 am

Program #: 2250191RB1

REBROADCAST

Monday, June 9, 2025

1:00 pm–2:30 pm

Program #: 2250191RB2

ON DEMAND WEBCAST

View after Monday, June 9, 2025

Program #: 2250191WBA

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Title 5 DEP Rules for Septic Systems

Overview and deep dive from the DEP experts

Hear experts from the Commonwealth of Massachusetts' Department of Environmental Protection dissect and analyze the Title 5 DEP rules for septic systems.

Agenda

- **Overview of 2023 Title 5 Revisions and Watershed Permit Regulations**
 - Overview of MassDEP's designations of Natural Resource Nitrogen Sensitive Areas (NRNSA), revisions to 310 C.M.R. 15.000, "Title 5", and the adoption of Watershed Permit Regulations at 314 C.M.R. 21.00, which were promulgated in 2023 to address nitrogen pollution in coastal waters. Hear the history of the Massachusetts Estuaries Project (MEP), the impacts of nitrogen on coastal waters, the adoption of regulations, and the status of progress on this issue.
- **Best Available Nitrogen Reducing Technology (BANRT) Overview**
 - As part of its NRNSA efforts, MassDEP designates best available nitrogen reducing technology (BANRT) innovative and alternative (I/A) septic systems. Hear an overview of the BANRT criteria and those systems designated to-date as BANRT.
 - Understand the relationship between nitrogen reducing I/A systems and the nitrogen loading limitations of 15.215(1). Specifically, learn why only nitrogen reducing systems with general use approval qualify for an exemption from 15.215(1) as described in 15.217(1).
- **Accessory Dwelling Units**
 - The Affordable Housing Act of 2024 amended G.L. c. 40A, § 3 to promote accessory dwelling units (ADUs) as one mechanism to alleviate the Commonwealth's housing shortage. Review how ADUs are addressed in 310 C.M.R. 15.000, Title 5, and the provisions to be aware of when designing or permitting ADUs.
- **Current Issues**
 - Learn how interfamily real property transfers are excluded from the Title 5 system inspection requirements.
 - Understand the disclosure requirements for the transfer of property in natural resource nitrogen-sensitive areas.
- **"Ask the DEP Experts" Q&A Session**

Faculty

Lealdon Langley, *Director of the Division of Watershed Management, Department of Environmental Protection, Commonwealth of Massachusetts, Chair*

Caroline Adamson, *Environmental Analyst, Wastewater Program, Department of Environmental Protection, Commonwealth of Massachusetts*

Deirdre Desmond, Esq., *Senior Counsel, Office of General Counsel, Department of Environmental Protection, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Friday, June 6, 2025
12:00 pm–1:30 pm
Program # 2250189WBC

REBROADCAST

Monday, June 23, 2025
3:00 pm–4:30 pm
Program # 2250189RB1

REBROADCAST

Tuesday, July 1, 2025
9:00 am–10:30 am
Program # 2250189RB2

ON DEMAND WEBCAST

View after Tuesday, July 1, 2025
Program # 2250189WBA

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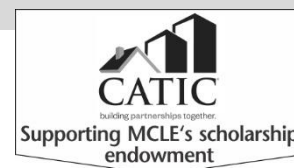
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Trusts in Real Estate

Transferring property to and from trusts

The process of transferring property into or out of trusts can be complicated and confusing. Our panel of experts demystifies the trust transfer process. Topics include the basics of transferring property into and out of trusts, identifying different types of trusts and the implications for transfer, addressing major title issues that arise when transferring property to and from trusts, and recognizing what documentation is needed to successfully complete the transfer. In addition, the panel discusses best practices, traps for the unwary, and common issues that arise at Land Court in this context.

Agenda

- Overview of Considerations Relevant to Real Estate Transfers
- Identifying Types of Trusts; Trustee's Certificates
- How to Properly Transfer Property into and Out of Inter Vivos, Testamentary, and Nominee Trusts
- Major Title Issues That Arise When Transferring Property to or from a Trust
- Considerations When the Real Estate Involves Registered Land
- Trust and Real Estate Litigation Considerations and Risks
- "Ask the Experts" Q&A Session

Faculty

Luke C. Bean, Esq., *Rico, Murphy, Diamond & Bean LLP, Natick, Chair*

Annelle E. Benson, Esq., *Senior Underwriting Counsel, First American Title Insurance Company, Worcester*

Christina T. Geaney, Esq., *Chief Title Examiner, Land Court, Commonwealth of Massachusetts*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, May 1, 2025

1:00 pm–4:00 pm

Program # 2250182WBC

REBROADCAST

Friday, May 16, 2025

9:00 am–12:00 pm

Program # 2250182RB1

REBROADCAST

Tuesday, May 27, 2025

11:00 am–2:00 pm

Program # 2250182RB2

ON DEMAND WEBCAST

View after Tuesday, May 27, 2025

Program # 2250182WBA

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In-Person Interactive Workshop: Wednesday, April 16, 2025, Program # TBD

Transform your mindset with the Kendall Project.

❖ **12th Annual Legal Services Conference 2025**

Live Webcast: Friday, May 9, 2025, Program # 2250218WBC

Join members of the Massachusetts legal services community to engage in a half-day of learning

❖ **27th Annual Paralegal Conference 2025**

In-Person Conference & Live Webcast: Tuesday, June 17, 2025, Program # 2250213P01

Stay on top of developments in the law while honing your skills in multiple practice areas.

❖ **District Court Judicial Forum 2025: Civil Cases**

Live Webcast: Tuesday, June 24, 2025, Program # 2250251WBC

Learn insights and tips directly from the judges.

❖ **How to Become a Judge or Clerk Magistrate**

Live Webcast: Date TBD, Program # 2250226WBC

So you want to be a judge?

❖ **Mock Trial of a Breach of Fiduciary Duty Case**

Live Webcast: Tuesday, June 17, 2025, Program # 2250252WBC

Hear the evidence, be the jury, discuss the strategy.



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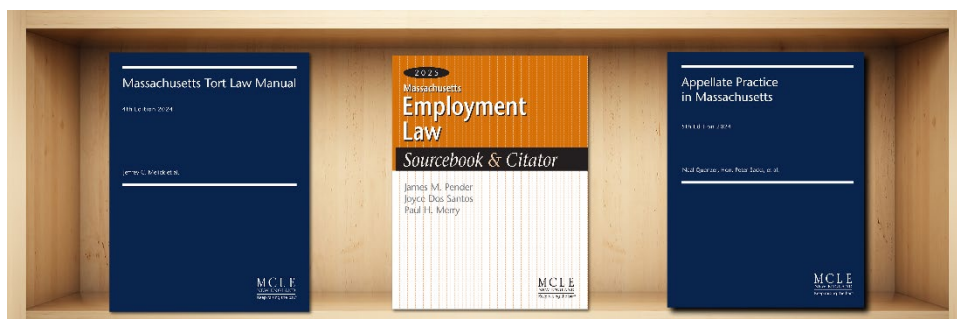
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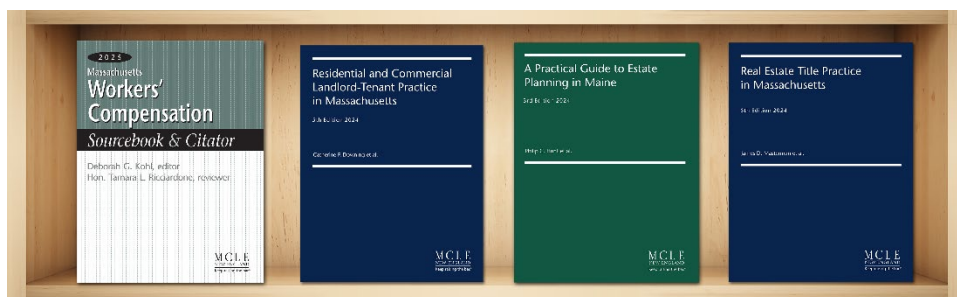
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