SEMINAR

MANDATORY Probate & Family Court Category E & F Training to Remain on Fee-Generating List for 2023

Gain valuable insights into how to make your next Category E or F appointment better, more effective, and more valuable to the parties, attorneys and court

This program presents an essential analysis and in-depth discussion of the many components inherent in Category E & F guardian ad litem appointments and their practical applications for guardians ad litem and attorneys, including how to interpret the order of appointment; what type of intake/questionnaire forms could or should be used; how bias can play a role throughout a GAL appointment; what makes a useful GAL report; and waiver of privilege from the view of the guardian and the view of the Category E/F GAL. Practice tips are offered by seasoned Category E and F GALs and Probate and Family Court Judges and staff. A representative from the Administrative Office of the Probate and Family Court (AOPFC) will answer the most frequently asked questions from guardians ad litem.

For Current Category E and Category F List Members: If you are currently on the Probate and Family Court's Category E or Category F Fee-Generating Appointment List, you are required to take the yearly CLE as set forth by the AOPFC. The ***live webcast, the recorded webcast, and the on-demand webcast*** of this program all fulfill the requirement to remain on the list for 2023, as long as you complete the required prompts and submit the required documentation to pandf.feegenerating@jud.state.ma.us.

Note: To obtain continuing education credits to meet your requirements to stay on the Category E or Category F list for 2023, you *must choose the "Prompts" option when you click the link to begin the* ***live webcast, the recorded webcast, and the on-demand webcast*** *and click* ***all*** *prompts as they appear during the program.*

Agenda

- How to Use Intake/Questionnaire Forms as a GAL
- What Makes a Useful GAL Report?
- Waiver/Assertion of Privilege in the Probate and Family Court
- "Ask the Experts" Q&A Session

Faculty

Diane J. Beswick, Esq., *Probate and Family Court Administrative Office, Commonwealth of Massachusetts*, Cochair; Denise M. Fitzgerald, Esq., *Probate and Family Court Administrative Office, Commonwealth of Massachusetts*, Cochair; Dr. Mira Z. Levitt, Ph.D., *Co-Parenting Assessment Center, Natick*; Linda Medeiros, Esq., *Law Office of Linda Medeiros, Danvers*; Thomas D. Ritter, Esq., *Atwood & Cherny, PC, Boston*; Talia N. Simonds, Esq., *Amaral & Associates, Winthrop*; Kelly Flynn Zawistowski, Esq., *Hampden Probate and Family Court, Commonwealth of Massachusetts*; Dr. Robert A. Zibbell, Ph.D., *Robert A. Zibbell, Ph.D., Monument Beach*

MCLE OnlinePass®

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

Dates & Location

Register at www.mcle.org

LIVE WEBCAST
Thursday, October 6, 2022
9:30 am–1:45 pm
Program Number: 2230062WBC

REBROADCAST CC
Friday, October 21, 2022
9:30 am–1:45 pm
Program Number: 2230062RBC

REBROADCAST CC
Monday, October 31, 2022
9:30 am–1:45 pm
Program Number: 2230062RB1

ON DEMAND WEBCAST CC
View after Monday, October 31, 2022
Program Number: 2230062WBA

Tuition *(includes written materials)*

- $165
- $148.50 MCLE Sponsor Members
- $82.50 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

The materials for this program are available online only and can be downloaded via the link emailed to you upon registration.

Also, there is no need to take extensive notes. Two weeks after the live webcast, all registrants receive a link to a verbatim transcript and audio and videorecordings of this program.

CLE Credits

Earn up to 4 CLE credits

About MCLE

Massachusetts Continuing Legal Education, Inc. (MCLE | New England™) has been the Massachusetts legal community's premier provider of hands-on programs, practical reference materials, and online resources for over 50 years.

MCLE is a self-supporting, independent, not-for-profit educational institution. We depend solely upon sponsor membership dues, program registration fees, publications sales, online subscriptions, and charitable contributions to finance our instructional activities and to sustain growth and innovation in our programs, publications, and online products and services.

Board of Trustees

Eric P. Hayes, *President*

Brendan T. St. Amant, *First Vice President*

Michael P. Sams, *Second Vice President*

Katherine A. Hesse, *Treasurer*

Kendi E. Ozmon, *Secretary*

Heidi S. Alexander

Christa A. Arcos

Kendra L. Berardi

Joshua M . Bowman

Gabriel Cheong

Robert P. Cooper

Kara M. DelTufo

Prasant D. Desai

Hon. Alexander Mitchell-Munevar

Peter M. Moldave

Terrence L. Parker

C. Max Perlman

Rebecca G. Pontikes

Ingrid C. Schroffner

Sunila Thomas-George

Richard C. Van Nostrand

Joseph P.J. Vrabel

Richard S. Milstein, *Founding Director*

John M. (Jack) Reilly, *Executive Director*

Policies and Information

Register early!

For course agendas, hours, fees, and discounts, please refer to the respective seminar pages. The fee includes program instruction and all electronic written materials unless otherwise noted.

To gain early access to online materials, please register in advance of the program.

Upon registration, MCLE will email a confirmation.

Day-of-the-program registrations are welcome, with the exception of limited enrollment programs, or as otherwise noted.

We accept cash, checks, MasterCard, Visa, American Express, and Discover.

Need special assistance?

If you are a person with a disability or special needs, please let us know in advance so that we can make your experience as convenient and comfortable as possible. Call Customer Service at 800-966-6253 to make arrangements.

For your convenience, MCLE also offers closed captioning CC and verbatim transcripts of all recorded webcast programs, available to you online two weeks after the original program date.

Mandatory CLE credits

Individual attorneys are responsible for checking with their particular state CLE accreditation authority about whether and how much credit will be granted. Although MCLE does not pursue state-based credit, MCLE programs are regularly approved in many jurisdictions. It is the responsibility of the individual attorney to submit the information and certifications required under the respective state rule to the appropriate authorities in the jurisdictions in which they seek credit.

Depending on the jurisdiction, lawyers can satisfy their mandatory CLE requirements online with MCLE's webcasts, which feature periodic attendance prompts, electronic written materials, and the opportunity to receive a certificate of attendance.

If your plans change

If you're unable to participate in a program on the date for which you registered, you will receive an email about how to access the program on demand via webcast and/or downloadable mp3 file, including the written materials in electronic form, in full satisfaction of the tuition paid. If you prefer a refund, let us know by the end of the business day prior to the program and we'll refund your tuition after deducting a $35 processing fee. Note that limited enrollment programs are an exception, cancellation of which require two weeks notice and are subject to a $75 processing fee.

New lawyer discounts—always the lowest price

For the first five years of practice, MCLE offers new lawyers a 50% discount on all of its products, including programs, books, mp3 recordings, and the MCLE OnlinePass®. If you were admitted to the bar within the last five years, take advantage of the new lawyer prices listed throughout this catalog.

Attorney scholarships

No lawyer should be precluded from participating in CLE due to financial barriers. Request a partial tuition scholarship in confidence by emailing scholarships@mcle.org at least two weeks in advance of the program.

Help MCLE grow new educational opportunities, become a Sponsor Member!

Sponsor Members receive:

- **Public recognition** on our website;
- Significant savings on a **subscription to MCLE's OnlinePass®**;
- **10% discount** on all programs, books, and mp3 recordings;
- Weekly **email updates** and **advance notice** of sales and new product releases; and
- The **highest level of service** offered by your own Sponsor Account Specialist.

MCLE Sponsorship runs for 12 months beginning September 1.

The fee for firm, corporate law department, or agency membership is calculated based on the number of Massachusetts admittees within the organization. Benefits of membership extend to all lawyers and non-lawyer professionals associated with the organization.

- Solo Practitioners $95
- Firms by number of Massachusetts attorneys:
  - 2-5. . . . . $ 150
  - 6-10 250
  - 11-25 500
  - 26-75 . . . 1,000
  - 76-150 . . . . $ 2,500
  - 151-250 3,500
  - 251+ 4,500

Order Form Fall/Winter | Sept 2022–Feb 2023

REFERENCE # 23-020

Choose from 5 easy ways to order!

- **ONLINE** enter your credit card order at **www.mcle.org.**
- **MAIL** this order form with payment to MCLE, Inc., Ten Winter Place, Boston, MA 02108-4751.
- **FAX** your credit card order 24 hours a day to 617-482-9498.
- **CALL IN** your credit card order to (800) 966-6253, Monday – Friday, 8:30 am–5:00 pm
- **WALK UP** on the day of the program or **DROP IN** to MCLE's bookstore, Monday – Friday, 8:30 am–5:00 pm

1 CUSTOMER INFORMATION

Year Admitted to MA Bar _____ Title (if any) _____ BBO # _____

Last Name _____ First Name _____ Middle Initial _____

Firm/Agency _____

Street Address _____ Suite/Floor _____

City _____ State _____ ZIP+4 _____

Telephone _____ Fax _____

Order confirmation? Enter your email address: _____

2 ORDER DETAILS

Not an MCLE Sponsor Member? Become one today and receive the MCLE Sponsor Member discounted prices on this order! . . . . . **MCLE SPONSOR MEMBER DUES** *(see fee chart on previous page)* . . . . . $

PROGRAMS

Product No.	Title	Automatic book update	Cost
		Opt-out ☐	$
		Opt-out ☐	$
		Opt-out ☐	$

PROGRAMS SUBTOTAL . . . . . $

BOOKS (For eBook options, visit www.mcle.org)

Product No.	Title	Automatic book update	Cost
		Opt-out ☐	$
		Opt-out ☐	$
		Opt-out ☐	$
		Opt-out ☐	$

Shipping & handling $ 8.50

BOOKS SUBTOTAL . . . . . $

3 PAYMENT METHOD

GRAND TOTAL $

☐ Check payable to MCLE enclosed ☐ VISA ☐ MasterCard ☐ AMERICAN EXPRESS ☐ DISCOVER

Card number _____ Expiration date _____ CVC _____

Cardholder's name _____ Cardholder's signature _____

MCLE NEW ENGLAND
Keep raising the bar.®

Massachusetts Continuing Legal Education, Inc.
Ten Winter Place, Boston, MA 02108-4751 | 617-482-2205 | MA toll free 800-966-6253 | FAX 617-482-9498 | www.mcle.org