

# Domestic Relations Financial Summit 2023

*Insight into judicial thinking and discretion*

Join us for the 2nd annual *Domestic Relations Financial Summit*, this year in person and online! Our esteemed panels discuss everything financial from child support to valuations post-COVID to cryptocurrency in divorces. The program provides practical and timely advice from judges, experts, and experienced practitioners who share the information and tools you need to build and maintain the core of a successful domestic relations practice in an ever-changing and challenging economic climate.

## Agenda

- New Child Support Guidelines—a Year (Plus) Later —Features, Implication, Best Practices, and the Interplay with Alimony and College Contribution
- Valuing Businesses Post-COVID—Considerations, Trends, and Issues
- Real Estate Valuations and Sales—Impact of Current Housing Market on Valuations and Sales, and What Can We Expect Going Forward
- Cryptocurrency and Divorce—What Is It, How to Locate It, and Once Found, What to Do With It—Both as an Asset and as an Income Stream
- Trust Interests in Divorce—Types of Trusts and Beneficial Interests, Permissible Scope of Discovery, and When and How a Trust Interest Becomes an Asset Subject to Division in Divorce or Stream of Income for Purposes of Calculating Support
- Ask the Judges

## Faculty

Andrea Nelson, Esq., *Burns & Levinson LLP, Boston, Chair*  
 Hon. Thomas J. Barbar, *Probate and Family Court, Commonwealth of Massachusetts*  
 Marc D. Bello, CPA/ABV, CVA, MAFF, *Edelstein & Company LLP, Boston*  
 Hon. Kevin R. Connelly, *Probate and Family Court, Commonwealth of Massachusetts*  
 Andrea T. Dunbar, Esq., *Assistant Judicial Case Manager, Probate and Family Court, Commonwealth of Massachusetts*  
 Morgan Fennell, MRA, *The Appraisers Group, Belmont*  
 Jonathan E. Fields, Esq., *Fields and Dennis LLP, Wellesley*  
 Hon. Frances M. Giordano, *Probate and Family Court, Commonwealth of Massachusetts*  
 Peter J. Jamieson, Esq., *Perocchi Family Law Group LLP, North Andover*  
 Michael P. Judge, Esq., *Casner & Edwards LLP, Boston*  
 Juliet Leydon, *Realtor, Juliet & Co. at Compass, Boston*  
 Richard M. Novitch, Esq., *Todd & Weld LLP, Boston*  
 Robert J. O'Regan, Esq., *Burns & Levinson LLP, Boston*  
 Jason Pierce, CPA, CMA, CFM, CVA, *JS Held, Newton*  
 Richard Sanders, *Lead Investigator/Principal, CipherBlade, Pittsburgh, PA*  
 Meghan C. Thorp, Esq., *Baskin Kershner & Thorp LLC, Boston*  
 Hon. Jennifer M. R. Ulwick, *Probate and Family Court, Commonwealth of Massachusetts*  
 Amanda Vanderhorst, Esq., *Kates & Barlow, PC, Boston*  
 Donna M. White, Esq., *Rubin and Rudman LLP, Boston*

## Dates & Locations

Register at [www.mcle.org](http://www.mcle.org)

### BOSTON

Thursday, February 16, 2023  
 9:30 am–4:30 pm  
 MCLE Conference Center,  
 10 Winter Place, via Winter Street  
 Program Number: 2230103P01

### LIVE WEBCAST

Thursday, February 16, 2023  
 9:30 am–4:30 pm  
 Program Number: 2230103WBC

### REBROADCAST

Friday, March 3, 2023  
 9:30 am–4:30 pm  
 Program Number: 2230103RBC

### REBROADCAST

Monday, March 13, 2023  
 9:30 am–4:30 pm  
 Program Number: 2230103RB1

### ON DEMAND WEBCAST

View after Monday, March 13, 2023  
 Program Number: 2230103WBA

## Tuition *(includes written materials)*

- \$225
- \$202.50 MCLE Sponsor 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](mailto:scholarships@mcle.org).

## Materials

The materials for this program include MCLE's *Financial Aspects of Divorce in Massachusetts*, which, along with any other materials, 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 6 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](http://www.mcle.org)

## 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. Vrubel

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  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.

## 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.

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](mailto:scholarships@mcle.org) at least two weeks in advance of the program.

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    ■ 76-150 .... \$2,500
  - 6-10 ..... 250    ■ 151-250 .... 3,500
  - 11-25 .... 500    ■ 251+ ..... 4,500
  - 26-75 ... 1,000

# 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](http://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! ..... (see fee chart on previous page) .....

PROGRAMS	Product No.	Title	Automatic book update	Cost
	_____	_____	Opt-out <input type="checkbox"/>	\$ _____
	_____	_____	Opt-out <input type="checkbox"/>	\$ _____
	_____	_____	Opt-out <input type="checkbox"/>	\$ _____
<b>PROGRAMS SUBTOTAL .....</b>				\$ _____

BOOKS (For eBook options, visit <a href="http://www.mcle.org">www.mcle.org</a> )	Product No.	Title	Automatic book update	Cost
	_____	_____	Opt-out <input type="checkbox"/>	\$ _____
	_____	_____	Opt-out <input type="checkbox"/>	\$ _____
	_____	_____	Opt-out <input type="checkbox"/>	\$ _____
	_____	_____	Opt-out <input type="checkbox"/>	\$ _____
<b>Shipping &amp; handling</b>				\$ 8.50
<b>BOOKS SUBTOTAL .....</b>				\$ _____

### 3 PAYMENT METHOD

**GRAND TOTAL**

Check payable to MCLE enclosed  
   
   
   

Card number \_\_\_\_\_ Expiration date \_\_\_\_\_ CVC \_\_\_\_\_

Cardholder's name \_\_\_\_\_ Cardholder's signature \_\_\_\_\_