

MAY 21-23, 2021 • JOIN US VIRTUALLY
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A FAMILY LAW CASE STUDY

2021

AMERICAN ACADEMY OF MATRIMONIAL LAWYERS
NORTHERN CALIFORNIA CHAPTER'S 44TH ANNUAL SYMPOSIUM
CO-CHAIRS: KELLY SHINDELL DELACEY, CFLS, AAML, DAVID M. YOUNGSMITH CFLS, AAML

F R I D A Y , 0 5 . 2 1 . 2 0 2 1

WELCOME AND ANNOUNCEMENTS

9:15 - 9:30 AM

David Youngsmith, Kelly J. Shindell DeLacey, and AAML NorCal President Gretchen Wallacker

Sponsored By CBIZ Forensic Consulting Group

CLIENT INTERVIEWS

9:30 - 10:30 AM

Clients: Tanya Prioste, Brandon Blevans

Attorneys: Sarah Killingsworth, Samantha Bley De Jean

These mock interviews will introduce attendees to our Symposium Clients, Ruth and Samuel Wonderly. Experienced family law attorneys will elicit facts that raise the issues to be covered by the presentations throughout the Symposium. The interviews will reflect the general factual scenario included in the materials given to attendees, with a few surprises thrown in.

Sponsored By Schultze Boone & Silva

BRAIN BREAK - Sponsored By DeLacey Riebel Shindell, LLP

10:30 - 10:45 AM

KEYNOTE - FROM THE IVY LEAGUE TO A GUN AT MY HEAD

10:45 AM - 12:15 PM

Leslie Morgan Steiner

Domestic violence survivor, TedTalk speaker, and Crazy Love author Leslie Morgan Steiner unpacks the complex psychological, physical, and financial components of relationship abuse. She tackles the myths and misconceptions imbedded in the routine query "Why Doesn't She Just Leave?" and explores the positive role attorneys, judges, and advocates can play in helping victims and children avoid further abuse in family court and afterwards. Includes Q&A.

Sponsored By Lakin Spears, LLP

BNY MELLON'S MINDFUL MOVEMENT & MEDITATION FOR MATRIMONIAL MASTERMINDS

12:30 - 1:15 PM

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MANAGING THE INTERSECTION OF PSYCHOLOGY AND FAMILY LAW

1:30 - 2:30 PM

Jill Hersh, Rebecca Robbins, Ph.D.

The parallel paths of the legal process and the psychotherapeutic treatment of clients can work together to improve clients' experience, outcome, and recovery. This presentation will discuss how to manage the psychodynamics of clients' transitions and the relationship they will have with their attorneys during family law matters. It will also review how mental health consultants can assist lawyers, provide support, and increase the chances of strong and successful partnerships with clients.

Sponsored By BNY Mellon Wealth Management

BRAIN BREAK - Sponsored By Gursej Schneider LLP

2:30 - 2:45 PM

WHEN BAD BEHAVIOR BECOMES CRIMINAL: PREVENTION AND RESPONSE

2:45 - 3:45 PM

Stuart Hanlon, Hon. Monica Wiley, Lorie Nachlis

Family law cases often involve actual or potential crimes, such as domestic violence, stalking, threats, and surveillance. Should your client talk to the police? Waive Fifth Amendment rights? Can you use recorded conversations? Many decisions have to be made early in family law cases. This presentation will discuss these issues, how they arise, and when and why the family law practitioner should contact a criminal attorney.

Sponsored By Granberg Law Office

K E Y N O T E S P E A K E R



L E S L I E M O R G A N S T E I N E R

NEW YORK TIMES BEST-SELLING AUTHOR, COLUMNIST FOR THE WASHINGTON POST, FEMALE EMPOWERMENT SPEAKER, SUCCESSFUL CORPORATE EXECUTIVE - AND DOMESTIC VIOLENCE SURVIVOR.

Leslie Morgan Steiner is the author of four nonfiction books: the New York Times bestselling memoir *Crazy Love*; the critically acclaimed anthology *Mommy Wars: Stay-at-Home and Career Moms Face Off on Their Choices, Their Lives, Their Families*; *The Baby Chase: How Surrogacy is Transforming the American Family*; and her latest memoir, *The Naked Truth*, which explores female sexuality, self-esteem and dating after 50. She graduated from Harvard College and Wharton business school. Steiner is a regular guest on *The Today Show*,

National Public Radio, Anderson Cooper 360, The Tamron Hall Show, ABC, NBC, CBS, and cable news networks. She has appeared in *The Washington Post*, *Newsweek*, *BusinessWeek*, *Elle*, *Parents*, *Self*, *Vogue*, *Vanity Fair*, *The Los Angeles Times*, and *CNN.com*. She is a frequent speaker and consultant on the subjects of marketing to moms and ending family violence. Her 2012 TEDTalk about domestic violence has been viewed by over six million people, and in 2014 she completed her second TEDTalk exploring the ethics of global surrogacy. She serves as a board member for the One Love Foundation, in honor of slain University of Virginia senior Yeardeley Love.

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REGISTRATION FEE • \$500

SCHOLARSHIPS • A limited number of scholarships are available. Please see the event page for more information.

CANCELLATION POLICY

- Written notice received by March 21, 2021 will be issued full refund less \$25 fee.
- Written notice received by April 21, 2021 will be issued a 50% refund.
- No refunds will be issued for cancellations received after April 21, 2021.

QUESTIONS?

Please contact AAML NorCal Executive Director, Jennifer Cass at admin@aamlnorcal.org

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WELCOME AND ANNOUNCEMENTS

8:20 - 8:30 AM

David Youngsmith, Kelly J. Shindell DeLacey
Sponsored By CBIZ Forensic Consulting Group

ADVANCED BUSINESS INCOME ISSUES

8:30 -9:30 AM

Ron Granberg, Robert Blevans

How should post-separation income from a business be characterized and allocated? What factors impact the determination of business income available for support? This program will assist you in developing your clients' best arguments.

Sponsored By CBIZ Forensic Consulting Group

ROUNDING OUT THE TEAM: WHEN AND HOW TO ENGAGE A FINANCIAL PLANNER TO APPLY STATE-OF-THE-ART FINANCIAL TOOLS & TECHNIQUES IN COMPLEX DIVORCES

9:30 - 10:30 AM

Belinda Hanson, Tim Keating

What does your client need to live comfortably for the rest of his or her life after divorce? What type of financial planning expertise is required, and when and how do you engage an expert? This is always a critical starting point for any financial settlement discussion. This presentation will evaluate various examples to illustrate key essentials of a high-quality financial plan and show how to determine the right "number" that is needed.

Sponsored By DeLacey, Riebel & Shindell, LLP

BRAIN BREAK - Sponsored By Bernstein Private Wealth Management

10:30 - 10:45 AM

HOW THE NEW TAX LAW AFFECTS FAMILY LAW

10:45 AM - 12:00 PM

Justin Miller, Tom Hamerlinck

Recent tax reform could make divorce a lot more taxing. Family lawyers must understand its implications in assisting their clients through the dissolution process. This presentation will provide essential tips and a checklist that will help every practitioner with key tax issues that may affect family law issues, including child tax credits, deductions, tax filing status, support, and prenuptial agreements.

Sponsored By Nachlis Freeman LLP

FROM NAPA TO NAPLES: WHAT YOU NEED TO KNOW ABOUT INTERNATIONAL CHILD ABDUCTION CASES

12:00 - 1:00 PM

Melissa Kucinski, Kimberly Cook, Hon. Hiram E. Puig-Lugo, Kelly J. Shindell DeLacey

Today, any family can be "international:" military families, diplomats, immigrants, or simply families who travel often and own property overseas. Practitioners can increasingly expect to work with multi-jurisdictional families. This program will address what family lawyers need in their tool kit, how to find resources and information to prevent and respond to child abductions, and when they should seek outside guidance from experts.

Sponsored By Hanson Crawford Crum Family Law Group

LUNCH PANEL - FURTHER DISCUSSION OF HOW TO USE FINANCIAL PLANNING TO NAVIGATE COMPLEX DIVORCES

1:10 - 2:10 PM

Pete Turner, Andrea Kushner, and Ashley Velategui

Sponsored By Bernstein Private Wealth Management

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WELCOME AND ANNOUNCEMENTS

8:20 - 8:30 AM

David Youngsmith, Kelly J. Shindell DeLacey
Sponsored By CBIZ Forensic Consulting Group

ASSESSMENT OF SUBSTANCE USE DISORDERS

8:30 - 9:30 AM

Renee Ross, Robert L. Kaufman, Ph.D., A.B.P.P., David Kan, MD, DFASAM

Cannabis and alcohol are the two most commonly used and misused drugs. This presentation will discuss the effects of such use on health and parenting. It will review the spectrum of non-problem use, problem use, and addiction, and discuss testing, monitoring, and safety concerns for minor children. It will make actionable recommendations for ordering drug and alcohol testing and SUD monitoring.

Sponsored By Fink Family Law

INVESTMENT ACCOUNTS: HOW TO AVOID HIDDEN TRAPS WHEN APPLYING THE PRINCIPLES OF TRACING, CHARACTERIZATION, AND APPORTIONMENT TO INVESTMENT ACCOUNTS

9:30 - 10:45 AM

Marie Ebersbacher, Steve Wagner, Michèle Bissada

This presentation will explore hidden traps when characterizing an investment account and tracing separate funds through a jointly titled account. Does a rationale applied by the Kentucky Supreme court suggest that depositing separate property funds into a jointly titled account in California will “block” an attempt to trace separate property? The presentation will also provide an overview of basic tracing principles.

Sponsored By Gursej Schneider LLP

BRAIN BREAK

10:45 - 11:00 AM

Sponsored by Elaina Serotte, CDFA, CFP® Wealth Advisor | Parallel Advisors

THE DISCOVERY ACT APPLIES IN FAMILY LAW

11:00 AM - 12:00 PM

Katherine Gallo, Hon. Pat Lucas, Charles DeLacey

Informality and flexibility are accepted in marital dissolution proceedings, but no statute or court rule exempts family law proceedings from the Civil Discovery Act. This presentation will address the common mistakes made by family law attorneys regarding discovery, as well as how to develop a discovery plan, prepare properly written discovery, and what your obligations are in responding to discovery.

Sponsored by Elaina Serotte, CDFA, CFP® Wealth Advisor | Parallel Advisors

IT'S NONE OF YOUR BUSINESS...OR IS IT?

12:00 - 1:00 PM

Larry Moskowitz, Robert Brandt, Judy Curtin

This panel will explore issues relating to the various distinctions in characterizing businesses, such as a personal service business versus a more complex manufacturing business. The panel will analyze recent cases concerning the apportionment of separate and community business interests and the approaches to the valuation of business entities.

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