

AVERTING DISASTER: *HOPE FOR THE BEST...* *PLAN FOR THE WORST*



THE MERITAGE RESORT AND SPA
875 BORDEAUX WAY, NAPA, CALIFORNIA, 94558
EARN UP TO 12.25 HOURS OF MCLE & CFLS CREDIT

MAY 3 - 5, 2024
47TH ANNUAL SYMPOSIUM

REGISTRATION AND BREAKFAST

8:00 AM - 9:00 AM

WELCOME TO "AVERTING DISASTER: HOPE FOR THE BEST; PLAN FOR THE WORST"

9:00 AM - 9:15 AM

*Co-Chairs: Nancy Encarnacion Mass and Marisa San Filippo**Chapter President: Renee Ross***MO MONEY, MO PROBLEMS: INCOME FOR SUPPORT AND THE NOTORIOUS M.S.O.I**

9:15 AM - 10:15 AM

Samantha Bley DeJean, Tracy Katz, CPA, CFF, and Katie Sims, CPA

This panel will explore complex issues surrounding child and spousal support, including complicated compensation structures and Marital Standard of Living considerations. Does Marital Standard of Living apply to temporary spousal support? How do you handle outlier years or complicated one-time income events, such as an acquisition, IPO, or other liquidity event, or other complicated income structures, such as carried interest or K-1 income? How do these issues impact child or spousal support? This panel will discuss these issues from both sides, as well as share ideas on how best formulate a strategy at the beginning of your case to tackle these topics.

BREAK

10:15 AM - 10:25 AM

CO-OWNERSHIP OF A COMMUNITY BUSINESS AFTER DIVORCE: WHAT COULD POSSIBLY GO WRONG?

10:25 AM - 11:55 AM

Kenneth J. Pia, Jr., CPA, ABV, ASA, MCBA, Eric Sternberger, and Romy S. Taubman

Business valuation expert Kenneth Pia, corporate attorney Eric Sternberger, and family law attorney Romy S. Taubman will discuss hot-button topics when considering and creating a new partnership between ex-spouses, including issues of day-to-day management and control, compensation for the in-spouse, voting rights, financial oversight, exit strategies, and dispute resolution.

LUNCH BREAK

12:00 PM - 1:00 PM

CAN I GET A CONSULTATION? PSYCHOLOGICAL TESTING IN FAMILY LAW MATTERS

1:00 PM - 2:30 PM

Gretchen B. Rubel, Jacqueline Singer, PhD, and Dale M. Siperstein, MFT, PhD, ABPP

Two Forensic Psychologists respond to questions raised by an Attorney during a case consultation of family law matters. The attorney raises general questions about the role of testing in the psychological assessment of parents for child custody issues. Topics to be addressed include orders needed for psychological testing, professional guidelines governing the use of testing in parenting plan evaluations, the differences between psychological testing and psychological assessment, the use of computer-generated reports, myths about the use of testing, how culture impacts test results, and what testing can add to the understanding of the case. Finally, the consultants will share what constitutes the appropriate use and interpretations of testing data to aid in a more comprehensive understanding of the family under evaluation.

BREAK

2:30 PM - 2:50 PM

ICEBERG AHEAD: MASTERING SET ASIDES AND POST-JUDGMENT RELIEF

2:50 PM - 3:50 PM

Andrew J. Botros and Sandra L. Mayberry

This presentation will cover post-judgment relief in family court, including a discussion of set asides, delayed discovery, relief under Family Code section 1101(g) and (h), and omitted assets. The program's focus will be practice pointers and will discuss several strategies regarding set asides of judgments regarding particular assets, such as businesses, pensions, and even survivor benefit plans. The program will also discuss circumstances where an attorney should or should not file a set aside motion, along with disclosures that should be made to every client that treads in this difficult and complex area of the law.

WELCOME RECEPTION - ON THE VILLAGE LAWN AT THE GRAND RESERVE

5:30 PM - 7:00 PM



S A T U R D A Y

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BREAKFAST

8:00 AM - 9:00 AM

ANNOUNCEMENTS

9:00 AM - 9:05 AM

Co-Chairs: Nancy Encarnacion Mass and Marisa San Filippo

Chapter President: Renee Ross

CUSTODIAL CONSIDERATIONS FOR CHILDREN WITH COMPLEX NEEDS

9:05 AM -10:35 AM

Mindy Penzias Dirks, Ph.D., Hon. Susan L. Greenberg, and Andrea Palash

This panel will explore how to fashion custody solutions for children with complex needs, with the understanding that all adults involved —parents and practitioners alike—must approach the crafting of solutions with humility and flexibility of thought. We will examine from three different perspectives an approach to decision-making as a series of mindful steps informed by observations of a child's behavior, empathy for a child's feelings, insight into a child's needs, understanding options to help meet those needs, and openness to new and evolving information.

BREAK

10:35 AM - 10:40 AM

DISCOVERING AND DEALING WITH INNATE UNCONSCIOUS BIAS AT WORK

10:40 AM - 11:55 AM

Sacha Joseph-Mathews, PhD

This presentation will address the principles of unconscious bias in the workplace. What is it? What are the various dynamics at play in the workplace as it pertains to Unconscious or Implicit Bias? Dr. Joseph-Mathews will provide fundamental knowledge, tools, and resources to identify, address, and minimize unconscious bias in the workplace and your cases. Dr. Joseph-Mathews will discuss some of the natural conflicts that can arise when employees, clients, or opposing counsel of diverse backgrounds come together. This presentation will demonstrate how differences in communication styles, leadership, and backgrounds, coupled with the impact of media and other societal influences, can lead to stereotypical profiles of co-workers, supervisory staff, clients, and opposing counsel alike.

BREAK

11:55 AM - 12:10 PM

PRACTICAL (OR PARANOID???) PERSPECTIVES ON PREMARITAL AGREEMENTS

12:10 PM - 1:40 PM


Garrett C. Dailey, Geniveve J. Ruskus, and Ellen Winick Stross

This panel of experts will provide practice tips and substantive suggestions for drafting prenups in California that will (hopefully) stand the test of time, even if the marriage does not. Topics will include practice tips on procedures, including fees, signing procedures, and drafting, as well as substantive suggestions for solving common issues, including whether spousal support provisions can be drafted to survive in the wake of an ever-shifting legal landscape.

DINE-AROUNDS

6:00 PM

Dine-arounds are back! Mix and mingle at various Napa restaurants. Keep an eye out for sign-up information in the coming weeks.



SUNDAY

05.05.2024

BREAKFAST

8:00 AM - 9:00 AM

ANNOUNCEMENTS

9:00 AM - 9:05 AM

Co-Chairs: Nancy Encarnacion Mass and Marisa San Filippo

Chapter President: Renee Ross

TECHNOLOGICAL THREATS TO OUR PRACTICE, FORENSIC IMAGING, AI

9:05 AM -10:35 AM

Joseph Crawford, David Erb, Michael Garlie, and Cecilia Ziniti

This panel discussion brings together a unique mix of experts – a family law attorney, an AI-informed general counsel, and a forensics and e-discovery expert. Together, they will provide insightful strategies for leveraging AI in your practice with a focus on ethics. Should you use it? Are you preventing possible disaster by using it or inviting it?

BREAK

10:35 AM - 10:50 AM

ETHICS/BIAS

10:50 AM - 12:20 PM

Rodrigo D. Dias, Natasha Parrett, Ashley Rodet, and Hon. Vanessa A. Zecher

Moderated by a family law judge, this will be a highly interactive panel presentation using hypotheticals to facilitate group analysis of common ethical challenges in family law matters. The panel will discuss ethical considerations in interactions with clients, opposing counsel, and judicial officers, as well as how to balance advocacy with problem-solving and strategic decisions with ethical constraints.

REGISTRATION INFORMATION



REGISTER ONLINE

[HTTPS://AAMLNORCAL.ORG/2024-SYMPOSIUM](https://aamlnorcal.org/2024-symposium)

REGISTRATION FEE

- \$975 - EARLY BIRD RATE EXPIRES MARCH 8, 2024
 - \$1,200 - AS OF MARCH 9, 2024
- REGISTRATION CLOSES APRIL 26, 2024.

SATURDAY DINE-AROUND

DINE-AROUNDS ARE BACK!

KEEP AN EYE OUT FOR SIGN-UP INFORMATION IN THE COMING WEEKS.

HOTEL ROOMS

- RESERVE YOUR ROOM AT THE MERITAGE WITH THE GROUP RATE OF \$369.
- RESERVE YOUR ROOM AT THE GRAND RESERVE WITH THE GROUP RATE OF \$449. (FRIDAY AND SATURDAY NIGHTS ONLY)

THE GROUP RATE EXPIRES ON MARCH 30, 2024.

CANCELLATION POLICY

WRITTEN NOTICE RECEIVED BY MARCH 22, 2024, WILL BE ISSUED A FULL REFUND, LESS A \$50 ADMIN FEE. NO REFUNDS WILL BE ISSUED FOR CANCELLATIONS RECEIVED AFTER MARCH 22, 2024.

SPONSORSHIP OPPORTUNITIES

[VIEW THE SPONSORSHIP STORE HERE.](#) ACT QUICKLY, AS SPONSORSHIPS ARE FIRST COME, FIRST SERVE! UNDERWRITING SPONSORSHIP OPPORTUNITIES ARE AVAILABLE, CONTACT ADMIN@AAMLNORCAL.ORG.

QUESTIONS?

PLEASE GET IN TOUCH WITH AAML NORCAL EXECUTIVE DIRECTOR JENNIFER CASS AT ADMIN@AAMLNORCAL.ORG.

AVERT DISASTER AND BOOK
YOUR ROOM EARLY!