

CLE Applied for

2010 API

Annual Conference on Group & Prepaid

Legal Services

May 20-22, 2010 Boston, Massachusetts

Omni Parker House Hotel



Sponsored by the ABA Standing Committee on
Prepaid Legal Services & the API Foundation

Old Ironsides

Friday Night Event sponsored by

Hyatt Legal Plans
A MetLife® Company

MEET
JOHN ADAMS

John Adams, the father of American Independence and the Second President of the United States at the 2010 API Educational Conference.

The historical figure of John Adams, portrayed by George Baker, will present his views of the nation, history and family life in a humorous and inspiring speech. He's so convincing, you might think he's the real man!

The evening, including a first-class dinner at the Omni Parker House Hotel, will include a chance to smooze with the "former president" one-on-one, as well as a chance to listen to a witty and revolutionary speech by America's second President."

This is a ticketed event - so make sure you reserve your spot when you register for the conference! Space will be limited!

6:00 - 9:00 pm

Tickets are \$50.00 per person

Please reserve your spots on the registration form.

Family friendly - so bring the kids!

**Thank you to Hyatt Legals Plans for sponsoring this event.
Please visit them at www.legalplans.com to learn more
about their plans.**



API 2010 Community Service Project - it's FREE!

Please consider joining your fellow API Conference attendees for the 2010 Service Project! It not only helps out the community where the conference is being held, it's also a great way to bond with your peers!

On May 22 from 1-4 PM, we will be volunteering for three hours and lead patient activities at the Barbara McInnis House, a respite program for homeless adults. Groups work with patients on art projects, play board games, distribute books, etc.

You must register on the general registration form and there are only 12 spots available. First come, first serve! Transportation and lunch will be provided - we just need your good will and time. Family friendly too!

Visit the API at www.apisi.org

Schedule At-a-Glance

Blue - Provider focused

Red - Trustee focused

Thursday, May 20

8:30 am - Noon	API Board Meeting
Noon - 1:45 pm	Welcome Luncheon with Maura Doyle, Clerk of the Massachusetts Supreme Judicial Court.
1:45 - 3:15 pm	Issues Facing the Industry
<i>Plenary</i>	
3:15 - 3:30 pm	Break
3:30 - 4:30 pm	The Successful and Productive Law Office
<i>Plenary</i>	
5:30 - 7:00 pm	API Annual Reception

Exhibitor hours:

May 20

Noon to 7:00 pm



May 21

7:30 am to 4:00 pm

May 22

8:00 am to 11:30 am

Friday, May 21

7:30 - 8:00 am	Continental Breakfast
8:00 - 9:00 am	Tech Show - 60 Tips in 60 Min.
<i>Plenary</i>	
9:00 - 10:00 am	Elder Law POA/Advance Directives
<i>Plenary</i>	
10:00 am - 10:20 am	Break
10:20 - 11:20 am	(1) Technology and Risk: The Good, The Bad and The Ugly
<i>Breakouts</i>	(2) Recent Legal Decisions in Employee Benefits, Labor & Employment Law
11:20 - 12:20 pm	(1) Using Amicus Attorney in Your Practice
<i>Breakouts</i>	(2) ERISA Update continued
12:30 - 1:30 pm	Annual Business Luncheon - Sponsored by 
1:45 - 2:45 pm	(1) Paperless Office
<i>Breakouts</i>	(2) Form 5500 - Understand it!
2:45 - 3:00 pm	Break
3:00 - 4:00 pm	Successfully Defending Debt Buyer Lawsuits
<i>Plenary</i>	
4:15 - 4:30 pm	Meeting of the New Board of Directors
6:00 pm	Friday Night Ticketed Event sponsored by  <i>Registration required</i>

Saturday, May 22

7:30 - 8:00 am	Continental Breakfast
8:00 - 9:00 am	(1) Trademark Infringement To Wills; It All Makes Sense To Me
<i>Breakouts</i>	(2) Trustee Roundtable
9:10 - 10:10 am	(1) Expanding Your Practice One Relationship at a Time
<i>Breakouts</i>	(2) Trustee Roundtable continued
10:20 - 11:20 am	(1) What Plans Want from Their Attorneys
<i>Breakouts</i>	(2) Investing Legal Plan Assets In An Uncertain World
11:30 - Noon	Planning for the Future
12:30 - 4:00 pm	Community Service Project

Schedule subject to change

Visit the API at www.aplsi.org

Thursday, May 20

8:30 am - Noon

Annual Meeting of the Board of Directors - All are welcome to attend or have the morning free to explore the city - there are 17 historical areas within walking distance of the hotel.

Noon - 1:30 pm Welcome Luncheon

Speaker: Maura Doyle, Clerk of the Massachusetts Supreme Judicial Court.

PLENARY

1:45 - 3:15 pm

Issues Facing the Industry

The State of the Industry hosted by *Tori Jo Wible*, Executive Director, API

Mike Maslanka, President of the API, will provide a welcome and some insight into the happenings with the API.

Don Dace, UAW-GM Legal Service Plans, will provide an update from the perspective of union plans.

Cameron Sutton, President and CEO of ARAG Group, will speak on the market opportunities still out there.

Andrew Kohn, General Counsel and VP Operations, Hyatt Legal Plans, will provide the view from the for profit administrator.

Pat Monks, an attorney provider, member of the API Board of Directors and Chairperson of the Membership Committee will provide information on membership issues and plan provider insights.

3:15 - 3:30 pm Break

PLENARY

3:30 - 4:30 pm

The Successful and Productive Law Office

This session will explore aspects of law office operation that lead to the effective and productive delivery of legal services. The discussion will include the management of client files, work flow issues, systems, the role of paralegals, client service and the importance of managing client expectations. The program will also look at the effect of the law office culture and how to maintain a healthy workplace for lawyers and staff. In the successful law office each person is provided both the necessary tools and the best possible environment to succeed, free of inefficiencies, internal strife and unnecessary stress.

Speaker: Arthur Greene - Boyer Greene, LLC

5:30 pm API Annual Reception

Friday, May 21

7:30 - 8:30 am Breakfast

PLENARY

8:00 - 9:00 am

60 Tips in 60 Min.

Technology can help attorneys provide superlative client services and gain efficiency. However, some technologies can introduce an element of insecurity, including exposure of confidential information and data breach. From time-saving tips on how to use common software applications to avoiding security gotchas to free tools that provide opportunities to re-examine

inefficient workflows, this session will have something for everyone! Learn how to use technology to better serve your clients, while keeping their information safe from prying eyes.

Speaker: Catherine Sanders Reach - ABA Legal Technology Resource Center

9:00 - 10:00 am

Elder Law POA/Advance Directives

This session will provide an overview of the estate and asset protection planning process related to life care planning, including the differences between a will and living trust and other methods to protect both the family home and savings. The session will also explore the need of an aging population to plan for long-term care and alternatives to nursing homes, especially with the rising costs of long-term care as baby boomers reach retirement age. Issues related to health care and end of life decision making, in light of major state reforms, will also be explored, focusing on durable powers of attorneys and health care proxies, as well as guardianships and conservatorships.

Speaker: Alex Moschella - Moschella & Winston, LLP

10:00 am - 10:20 am Break

Breakouts

10:20 - 11:20 am

Technology and Risk: The Good, The Bad and The Ugly

We will talk about the ways technology contributes to both risk and risk control in law practice. Ethical issues examined include: different types of risks

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arising from technology use, from discovery to electronic storage of information, to protection of personal identity information, to the relationship between changes in technology and a lawyer's standard of care.

Speaker: Emily Eichenhorn
- CNA's Lawyers Professional Liability Insurance Program

Recent Legal Decisions in Employee Benefits, Labor and Employment Law (2-hr session)

This session covers a review of the most significant recent Supreme Court decisions and selected lower court decisions affecting benefit plan fiduciaries and professionals. The practical lessons that can be taken from these decisions will be emphasized.

Take home from this session:

An understanding of important cases affecting health, pension, and prepaid legal plans

How these cases could affect trustee actions and policy development

What to watch for going forward.

Speaker: Katherine Hesse -
Murphy Hesse Toomey LeHane

BREAKOUTS
11:20 am - 12:20 pm

Using Amicus Attorney in Your Practice

With Amicus practice management software, legal professionals will improve the efficiency and profitability of their firms and get the most out of the time they spend practicing law. This presentation will cover:
Amicus Attorney

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An Overview of Managing Files; Managing Appointment and to do lists; Managing Contacts; Managing Documents; Streamlining Time Entry; Integration with Accounting software

Speaker: Shawn Walsh -
Paradigm Computer Consulting, Inc.

ERISA Update - continued

12:30 - 1:30 pm
Business Luncheon sponsored by



BREAKOUTS
1:45 - 2:45 pm

PaperPort

Learn what PaperPort Professional can do for your practice. This software offers a powerful combination of features. It provides scanning, advanced PDF creation, assembly, and search, automatic form filling, network document management and the ability to move or scan files from individual desktops to shared document repositories such as Microsoft® SharePoint® — all in one easy-to-use application. This session will show how to boost productivity, improve customer service and cut costs for bottom-line results.

Speaker: Jeffrey J. Segarra -
Director of Project Management

Form 5500 and Beyond - Understand it all!

Jonathan will give a regulatory update of current initiatives by the Employee Benefits Security Administration. An overview of the all-electronic, "EFAST2", filing acceptance system that commenced on January 1, 2010, for 2009 Form 5500 Annual

Report filings and for amending prior year annual report filings. Jonathan will highlight the Agency's current initiatives for creating lifetime income options for 401(k) plans.

Speaker: Jonathan Matzkin,
Department of Labor

2:45 - 3:00 pm Break

PLENARY

3:00 - 4:00 pm

Successfully Defending Debt Buyer Lawsuits

Lawsuits by credit card companies and debt buyers – companies that buy debt for pennies on the dollar – are up! This presentation will provide some successful strategies to defend these cases. Three areas will be covered: (1) Debt Buyer Proof (2) Statute of Limitations Issues. (3) Private Arbitration Forums.

Speaker: Robert Martin -
Associate Director of District Council 27 Municipal Employees Legal Services

4:15 - 4:30 pm
Meeting of New Board of Directors

6:00 pm
Friday Night Ticketed Event (see p.2 for details)
Sponsored by



Saturday, May 22

7:30 - 8:00 am Breakfast

BREAKOUTS

8:00 - 9:00 am

Trademark Infringement To Wills; It All Makes Sense To Me

How the world of trademark infringement, patent violations, and a Sporting Goods/Music store in Berkeley, CA led to a "Mystical Revelation" about Wills.

Speaker: Bill Go - Go & Associates

Trustee Roundtable (2hr session)

This is a special session dedicated to the issues most important to trustees presented in a roundtable format. The session will be led by three moderators, but with an open floor concept.

Speaker: Alice Yong- Boston Teachers Union Prepaid Legal Services Fund; Dan McDuffie - retired Trustee; Katherine Hesse - Murphy Hesse Toomey LeHane

BREAKOUTS

9:10 am - 10:10 am

Expanding Your Practice One Relationship at a Time

This session will provide practical and enjoyable ways to expand your client base one relationship at a time. Participants will learn how to integrate client development into their daily practice, effectively prepare for every meeting, expand their network of prospective clients, and make every interaction an opportunity to expand their reach into the community. In addition,

participants will also learn how to reconnect with dormant personal and professional contacts, they will also learn how to develop a systematic plan for follow through in order to avoid losing touch in the first place. Finally and most importantly, participants will learn how to make client development one of the most comfortable and enjoyable parts of their professional lives.

Speakers: Mark Maraia & Chris Kirby - Maraia & Associates, Inc.

10:10 - 10:20 am Break

Breakouts

10:20 am - 11:20 am

What Plans Want from Their Attorneys

Legal professionals can provide the knowledge, expertise and experience needed to prevent or resolve issues that threaten clients' well-being. Attorneys are often instrumental in strengthening personal safety nets in today's uncertain world. Legal plans that offer educational resources, strong professional relationships and a commitment to timely service to affect outcomes require the participation of top-notch legal professionals. This presentation will examine the role of network attorneys and what legal plans want from them.

Speaker: Ann Cosimano - ARAG; Len Feltoon, Countrywide Prepaid Legal Services; Brian Caron, Hyatt Legal Plans

INVESTING LEGAL PLAN ASSETS IN AN UNCERTAIN WORLD

After losing over one-half of its value, the U.S. equity market has

rebounded recently. However, the market remains well below its 2007 peak level. Despite recent data suggesting that the world economy is growing modestly, the potential for dramatic upheaval remains. Global fiscal and monetary efforts, while having led to short-term growth, have questionable medium- to long-term consequences. Risk is likely not going away any time soon; and the world in 2010 faces risks of a different character than it did in 2008 and 2009. How should Trustees ethically react to these major events? Have the rules for investing changed permanently? Fran Peters of Meketa Investment Group will discuss the current capital market and economic environment. He will address issues of long-term investment strategy, such as asset allocation, investment policy and the major issues surrounding selecting and monitoring investment managers in a turbulent market environment.

Speaker: Fran Peters - Associate Principal, Meketa Investment Group

PLENARY

11:30 - Noon

Planning for the Future

Join incoming API President, Bill Go at our final session where you can provide input on the content of next year's conference. Here is your chance to request sessions and features that will make future conferences more valuable to you.

Speaker: API incoming President, Bill Go - Go & Associates

Noon - Community Service Project (See p. 2 for details.)

Visit the API at www.aplsi.org

Registration

All persons must be registered to attend the conference. See the registration form on p. 8. Payment of the registration fee grants you access to all conference sessions, one copy of the written materials or electronic version, the Welcome Reception, two continental breakfasts, two luncheons, and all coffee breaks.

Register on-line for the **2010 API Annual Conference** at www.aplsi.org/conference, or by completing the enclosed registration form, and returning it by mail or fax. API accepts Visa, MasterCard and checks.

by Mail: American Prepaid Legal Services Institute
321 North Clark Street, 19th Floor
Chicago, IL 60654

by Fax: 312/988-5785

Website: www.aplsi.org/conference

Questions? Call: 312/988-5751 or 5752

Early registration rates are effective until Monday, April 8th - save \$100!! Conference registrations will not be processed until full payment has been received in the API office. Registrations must be received at the API office by April 26, 2010 for attendees to be listed on the Advance Registration list published for conference attendees.

Guest Tickets

Guest Badges for spouses and/or guests may be purchased for \$125, which will grant access to the Welcome Reception, continental breakfasts on Friday and Saturday, luncheons on Thursday and Friday, and all coffee breaks. **Please note that a Guest Badge is not the same as a Registration Badge. Entrance to conference program sessions is by Registration Badge only. Thank you for your cooperation.**

Cancellation Policy

A full refund of registration fees will be made if written or email notice is received by API in Chicago by April 26, 2010. Conference Registrants who cancel between April 26 and May 17 will be assessed a \$50 facilities and materials charge. After May 17, fees are not refundable but registration may be transferred to another representative from your organization.

Session Materials

As the API moves towards a paperless conference, we are offering materials in electronic or print form. People who choose electronic will receive the materials on CD within a lightweight portfolio including pad of paper, pen and CD holder and pullout folders for storage. If you choose the printed form, you'll receive them at the beginning of each session you attend. Printed materials will be limited with full versions available on the CD and website.

NEW!!*Buddy Bucks - How about a little incentive to bring in more people? Well Buddy Bucks is just what you need. It can work one of two ways - recruit a person to come to the conference and get \$25 off your conference registration OR apply it to the registration fees of the person you've recruited. Someone gets the savings, both get to come! Please designate on the registration who you've recruited and how to apply the Buddy Bucks!

Visit the API at www.aplsi.org

Veteran Discount

The API is pleased to offer a \$50 discount to any attendee who will be attending their 5th consecutive conference. This means you must have attended every conference since 2006. Verification is required - call if you're not sure!

Hotel Accommodations

The conference is being held at the Omni Parker House. API has negotiated a special rate of \$225 (single/double). To take advantage of the discounted rate, **book your room before 5:00 pm April 26, 2010.** Reservations after that date will be accepted by the hotel on a space-available basis and standard rooms may not be available at our special rate. For reservations call (800) 843-6664 and mention you are attending the API Annual Conference. **Hotel check-in time is 3:00 pm, check-out is 12:00 pm.**

Internet

Guest Rooms have High-Speed Internet access for \$9.95 per day plus tax for 24 hours. Complimentary for Select Guest Royalty Program Members.

Location

60 School Street Boston, Massachusetts 02108
Phone: (617) 227-8600 Fax: (617) 742-5729

Transportation

Taxi from Logan Airport

Fare average is between \$20.00 and \$28.00 depending on the traffic. The hotel is 2.5 miles from Logan International Airport. It takes 15-20 min. to get to the hotel depending on traffic.

Arrival and Parking

There is a \$40.00 charge for overnight valet parking. Additional fee for late pick-up after 1PM on day of departure is \$12. When you arrive, please stop in front of the School Street entrance to the Omni Parker House and speak to the Doorman.

Around Town

Boston is a city rich with history from the Boston cream pie to the Boston Tea Party or the midnight ride of Paul Revere. And the Omni Parker House puts you close to the city's best-loved locales. Boston is a patriotic town older than America itself, so a tour through the city's fabled streets is like a walk through time.

Stroll to Beacon Hill or the famous Orpheum Theatre, visit spirited Cambridge and the Harvard campus or catch a ballgame at Fenway Park. Take a walk down the Freedom Trail and shop in Quincy Market. At the Omni Parker House Hotel, you're a heartbeat away from the best of Beantown.

Continuing Legal Education Credit

Credit has been requested for the conference from every state with continuing legal education requirements for lawyers.

Consent to use of photographic images:

Attendees at the 2010 API Annual Conference constitutes an agreement by the registrant to API (both now & in the future) of the registrants photographs at all events associated with the 2010conference.

2010 Annual API Conference Registration

Register online at:
www.aplsi.org/conference/registration

Registrant Information

Name: _____ I am a conference speaker

Organization: _____

Address: _____

City: _____ State: ____ Zip: _____

Phone: _____ Fax: _____

Email: _____ (required)

Guest Badge Name (first and last) _____

If enclosing a check, make payable to: "API" and mail to:

**American Prepaid
Legal Services Institute
321 North Clark St., 19th Floor
Chicago, Illinois 60654-7598
Attention: Adrienne Tucker**

Fax: 312/988-5785
Questions? Call: 312/988-5751

To be listed in the Meeting Registrant Listing, please register by April 26, 2010.

Registration Fees (at 2005 prices!!!)	Early Bird Fee Before April 19th (Saves you \$100!!)	Regular Fee After April 19th	Total
* Regular Member	\$495 ea. x ____ people	\$595 ea. x ____ people	\$ _____
** Additional registrant (Regular member benefit only)	\$445 ea. x ____ people	\$545 ea. x ____ people	\$ _____
* Associate or Provider Member	\$595 ea. x ____ people	\$695 ea. x ____ people	\$ _____
Non-member (Includes a 1-yr. API provider Membership!)	\$695 ea. x ____ people	\$795 ea. x ____ people	\$ _____
One Day Only			
Members Rate	\$125 ea. x ____ people	\$225 ea. x ____ people	\$ _____
Non-member rate	\$210 ea. x ____ people	\$310 ea. x ____ people	\$ _____
Dinner with John Adams - ticketed event (see p.2 for event details)	\$50 ea. x ____ people	\$50 ea. x ____ people	\$ _____
Guest Tickets - required for food functions.	\$125 ea. x ____ people	\$125 ea. x ____ people	\$ _____ Enter guest name above.
Buddy Bucks (see p. 7 for details)	Apply \$25 to <u>my</u> fees or apply to: _____	Apply \$25 to <u>my</u> fees or apply to: _____	\$ (25.00) if applying to your fees only.
Veteran Discount (Must have attended <u>every</u> year since 2006.)	\$50 off total	\$50 off total	\$(50.00) Vet. discount
			TOTAL \$ _____

YES - I would like to participate in the Community Service Project (see p.2 for details) - ____ # of people attending.

Please include any dietary restrictions you have:

Book your hotel room today at the Omni Parker House by calling: (800) 843-6664. Room rates: \$225.00 single/double

Reservations must be made by Wednesday, April 26, 2010 to be guaranteed the discounted rate. Mention that you're attending the API Conference

Material format CD w/portfolio Printed

Assistance Requested Audio Visual Physical
An API staff member will personally call you to discuss your needs.

Payment Options

Please charge my:



Make all checks payable to: American Prepaid Legal Services Institute

Name on card: _____
Card #: _____
Exp. date: _____ 3-digit access code: _____

API Members:

* Please consult the "Members Only" section of the API website to check your current member category.

** Additional Registrants must be registered with the first registrant and have their fees paid by the first registrant to be eligible for the reduced fee.

Visit the API at www.aplsi.org