



**AAML MIDYEAR MEETING
MONTEGO BAY, JAMAICA**

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Jonathan Bates • Tina Shadix Roddenbery

CLE Day Coordinators

Helen R. Davis • Katharine Maddox • Anjela A. Shutts

CLE Committee

Amy J. Amundsen
Angela Pence England
Dana E. Prescott
Dawn R. Smith
Andrew Z. Soshnick
Brian C. Vertz

Monday, March 16

10:00 am – 4:00 pm Executive Committee Meeting
Rose Hall Boardroom

Tuesday, March 17

Breakfast on your own – Group seating at Choicez Patio

8:00 am – 9:00 am Committee Meetings - *See Posted Schedule*

9:30 am – 12:00 pm Chapter Leaders Meeting
St. Andrews

1:00 pm – 4:00 pm Hennenhoefer Council
St. Andrews

5:30 pm – 7:00 pm Welcome Reception
East Lawn

Dinner on your own – check sign up sheets for a few dine-around opportunities.

Wednesday, March 18, 2020

Breakfast on your own – Group seating at Choicez Patio

8:00 am – 9:00 am Committee Meetings - *See Posted Schedule*

9:30 am – 12:45 pm CLE Sessions
Ballroom Salon 1&2

DAY COORDINATOR – Katharine Maddox

Partnership Interests, Private Equity Investments, Executive Compensation: How to Value, Divide and Conquer!

This presentation will focus on the challenges in identifying, valuing and dividing various forms of interests in partnerships, private equity investments and executive compensation. The panel will discuss tips on how to identify all of the benefits in an Executive Compensation Package to evaluate its impact on income and distribution, value those benefits and address ways of dividing benefits given the often-found restrictions contained in Executive Compensation packages. Valuing Partnership interests and Private Equity Investments will also be explored, addressing issues relating to buy-sell agreements, partnership agreements and dividing capital accounts. Private Equity Investments will be discussed as to valuation issues and distribution concerns in the matrimonial context.

Speakers:

Natalie S. Lemos, Leinoff & Lemos, PA, Miami, FL
Ed Mooney, BNY Mellon Wealth, New York, NY

Equal Parenting vs Best Interest

This session will consist of an in-depth discussion, debate and analysis on whether Equal Parenting is truly in the Best Interest of the Child(ren). The panel will debate the pros and cons of each position and the need for statutory presumptions (or not), as well as provide suggested alternatives on how to deal with those parents who simply cannot or will not co-parent.

Speakers:

Kiilu Davis, kdlaw, PC, Scottsdale, AZ
Robin M. Deutsch, Ph. D., ABPP, Wellesley, MA
Katherine A. Kinser, Kinser & Bates, LLP, Dallas, TX

11:30 – 11:45

Break

Rebellion and Redemption: The Story of the Jamaican People from Bondage to Freedom

This presentation will provide an overview of Jamaican history and culture. It will look at the diverse groups of people arriving in Jamaica over the centuries from other parts of the world, bringing with them aspects of their own culture and creating a multiplicity of experiences as so fittingly expressed in Jamaica's motto- *Out of Many, One People*. The lecture will emphasize the long struggle of Jamaicans against subjugation, injustice, economic deprivation and the fight for full freedom. It will recount the bravery of the women pirates of Port Royal, the resistance to slavery and cultural annihilation and the legendary exploits of the Jamaican maroons like Nanny who used her magic spells to catch the British bullets fired at her armies to the final blow to colonial oppression delivered by Sam Sharpe. The presentation will illuminate the rich African legacy that dared to survive and the emergence of a modern-day culture that is vibrant and colorful with major achievements in the areas of music, sports and tourism. The lecture will include the contributions of East Indians, Chinese, Lebanese, Syrians and Jews to the development of modern Jamaica.

Speaker:

Dr. Steeve Buckridge, Professor of African and Caribbean History at Grand Valley State University, Allendale, MI

Thursday, March 19, 2020

Breakfast on your own – Group seating at Choicez Patio

8:00 a.m. – 9:00 a.m. Committee Meetings - *See Posted Schedule*

9:30 am – 12:45 pm CLE Sessions
Ballroom Salon 1&2

DAY COORDINATOR - Helen R. Davis

Top 7 Things to Know When Cross-Examining a Reasonable Compensation Expert

This presentation will explore why reasonable compensation is important in the area of family law. Factors to utilize in cross examining a reasonable compensation expert will be presented including job/role/individual comparisons. Attendees will be educated on primary compensation elements and various data sources, good and bad, to assist them in the cross examination, or preparation of, a compensation expert witness. Find out just when does pay become reasonable. Plus, examples and samples of document and information requests will be shared by the speakers.

Speakers:

Kelly A. Miles, Smith, Gilliam, Williams & Miles, Gainesville, GA
Edward R. Rataj, Compensation Consulting CBIZ, St. Louis, MO

Family Law Technology Toolbox

Every day, the family law practice becomes more involved in technology – from e-discovery to cyberspying – and effective lawyers have to keep up. The Practice & Technology Committee was formed as an alliance to study the impact of technology on our clients and our law offices. Today, five Tech aficionados will discuss cutting-edge solutions for the family lawyer.

Moderator:

Brian C. Vertz, Pollock Begg Komar Glasser & Vertz, LLC Pittsburgh, PA

Speakers:

Roberta S. Batley, Batley Powers Family Law PA, Albuquerque, NM
Susan Saper Galamba, McDowell, Rice, Smith & Buchanan, PC, Kansas City, MO
A. Craig Haston, The Haston Law Firm, PC, Houston, TX
Kenneth G. Raggio, Raggio & Raggio, PLLC, Dallas, TX
Kristal C. Thomson, Langley & Banack, Inc, San Antonio, TX

11:30 – 11:45

Break

The Good, The Bad, and the Ugly: Working with, Representing, and Advocating to the Millennial

Issues concerning millennials most readily appear when you are speaking of employee relations - i.e., how to address their desire for work-life balance without eviscerating law firm profits; how to feed their need for self-actualization, while training them in the sophisticated skill of litigation; how to locate those with intrinsic motivation; how to use compensation structures to spur extrinsic motivation; and the like. This presentation will focus on the good, the bad, and the ugly of working with the Millennial Lawyer, Millennial Client, and maybe even the Millennial Judge.

Speakers:

Brandon R. Blevans, Blevans & Blevans, LLP, Santa Rosa, CA
Cheryl L. Hepfer, Offit Kurman, PA, Bethesda, MD
Lisa T. Spencer, Henson & Efron, PA, Minneapolis, MN
Natalia C. Wilson, Ain & Bank, PC, Washington, DC

Friday, March 20, 2020

Breakfast on your own – Group seating at Choicez Patio

8:00 am – 9:00 am Committee Meetings - *See Posted Schedule*

9:30 am – 12:45 pm CLE Sessions
Ballroom Salon 1&2

DAY COORDINATOR - Anjela A. Shutts

Law Firm Marketing Strategies: Propelling Your Practice to the Next Level

A survey of marketing strategies to help build the practice you have always envisioned. This session will be an interactive discussion on specific marketing concepts, both traditional and contemporary, that family law practitioners may implement in growing their practice. We will also address certain ethical considerations you must consider when implementing these marketing strategies.

Speakers:

Jason Naimi, Naimi & Cerceo, Las Vegas, NV
Allison C. Williams, Williams Law Group, LLC, Short Hills, NJ
John Wright, Scorpion Internet Marketing, Valencia, CA

Negotiating Tax Clauses After TCJA - Which Side Do You Represent?

A demonstration of settlement and litigation techniques to work around or with TCJA's new alimony, business passthrough income (IRC Sec. 199A) rules and its effect on premarital agreements and retirement plans.

Moderator:

Amy J. Amundsen, Rice, Amundsen & Caperton, PLLC, Memphis, TN

Speakers:

Michael I. Flores, Michael I. Flores, PC, Orleans, MA

Daniel J. Jaffe, Jaffe Family Law Group, Beverly Hills, CA

Marjorie A. O'Connell, Washington, DC

11:30 – 11:45

Break

Top Ten Tips for Your Firm's Future Growth

Learn how to future-proof your firm through personality profiling, increased team engagement and productivity, developing leadership skills; growing your team strategically through leveraging associates, compensation and hiring techniques, and by monitoring your key performance indicators; and using ethical fee models and structures to grow your firm's bottom line.

Speakers:

Michael Hammond, Atticus, Inc., Mt. Dora FL

Scott M. Mann, Mann Tucker Muir, LLC, Leawood, KS

Jenny Stevens, The Stevens Firm, PA, Spartanburg, SC

1:30 pm – 5:30 pm*

Board of Governors Meeting
St. Andrews

7:00 pm – 10:00 pm

Jamaican Festival Reception & Dinner Dance
Ballroom

**Meeting will conclude as soon as all business is completed but will go no later than 5:30 p.m.*