



Montana Association of Legal Assistants*Paralegals

2019

Annual Meeting and Seminar **Controlling the Chaos**



March 22, 2019

Seminar Registration Deadline March 15, 2019

Hotel Reservation Deadline February 21, 2019

GranTree Inn
1325 N. 7th Avenue
Bozeman, Montana

6.0 CLE Credits (includes 2.0 Ethics Credit)

This is a Free seminar to all active and new members

Agenda

Friday, March 22, 2019

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| 8:00 am—8:15 am | Registration |
| 8:15 am—8:30 am | Key-Note Address—Opening Remarks
Terry Hale, ACP |
| 8:30 am—9:30 am | Tales from the Hot Seat: Tips for Preparing Materials,
Offering Effective Presentation Support, Managing
Technology and Helping Attorneys Create a Visual
Strategy for Trial
Carisa Fisher |
| 9:30 am—10:30 am | Know When (and How) to Hold and Produce ESI
Susan Mayer |
| 10:30 am—10:45 am | BREAK |
| 10:45 am—11:45 am | E-Filing on Civil Cases at Trial Courts
Ryan Davies |
| 11:45am —12:45 pm | Networking Lunch (Provided) |
| 12:45 pm—2:00 pm | MALA Annual Meeting |
| 2:00 pm—3:00 pm | Technology & Rules of Professional Conduct:
Evolving Technology & Standards
Sam Alpert |
| 3:00 pm—4:00 pm | Succeeding (and Surviving!) at Trial
Alisia Duganz, CP |
| 4:00 pm—5:00 pm | Technology—Internet Sleuthing
Terry Hale, ACP |

Speakers



Carisa Fisher— does trial support and visual strategy development, technology management, video production, general business development, marketing, meeting hosting, events, training, and a variety of other tasks. Carisa has participated in some premiere trial strategy training courses, developing her skills in visual story telling and strategic analysis of cases. Having grown up in this beautiful state, Carisa has always been a Montana kid at heart, despite perhaps a wanderlust for foreign lands and travel in general. Carisa attended the University of Montana following high school, and then moved to Seattle, finishing her degree in English Literature at the University of Washington. During her time in Seattle, she became involved in public relations, advertising and marketing, and over the years, have worked for some amazing companies, including [Vandenberg Communications](#), [Publicis Seattle](#), and [Neverstop](#). Carisa returned home to Montana in late 2008 to help expand and develop the family business. Carisa loves playing in the mountains, skiing, camping, and spending time with her boyfriend, friends and family, which include her 5 adorable nieces and nephews. Carisa's passions and pursuits lie within the intersection of business and creativity. She loves technology, photography and video production, entrepreneurial pursuits, architectural and interior design, the art of food and wine, travel, creative and inspired living, and singing and playing music.



Susan Mayer—is President and CEO of Litigation Abstract, Inc., headquartered in Missoula, Montana, with a sales and service office in Seattle, Washington. Susan graduated from Duke University with a degree in History. Since 1989, Susan and Litigation Abstract, Inc. have provided customized litigation support services to both public and private clients in the United States and Canada, including data and information management, discovery reviews, document and ediscovery productions and electronic trial support. Susan is an active member of Women in Ediscovery, participates in The Sedona Conference on ediscovery, writes a blog on litigation support and ediscovery, and frequently speaks on data management, ediscovery and electronic trial.

Speakers



Ryan Davies —graduated from Montana State University in 2015 with a degree in Economics. In 2016, he joined the Montana Supreme Court as an E-Filing Business Analyst. He enjoys working with the courts to help implement a system that brings many benefits and efficiencies to the courts. When not at work, Ryan can often be found in one of Montana's many mountain ranges.



Sam Alpert—Sam Alpert is the Director of Information Technology and Digital Strategy with the State Bar of Montana. He moved to Montana from his home state of Virginia in 2010 to serve as an AmeriCorps VISTA with Montana Legal Services Association and Pro Bono Net, a legal technology non-profit. During his two terms in AmeriCorps, Sam worked on a variety of technology projects aimed at increasing access to justice. After two terms of service, Sam worked for LexisNexis Risk Solutions in Bozeman, MT before returning to Helena to work with the State Bar of Montana. In addition to maintaining State Bar systems and serving as the staff liaison to the State Bar's Technology Committee, Sam is available as a resource to State Bar of Montana members with questions about technology.

Speakers



Alisia Duganz, CP grew up in Southern Oregon. She moved to Montana in 2007 to attend the University of Montana School of Journalism, graduating with honors in 2011. After a short stint as a small-town journalist, Alisia moved to Bozeman to work as an intern at the Goetz Law Firm. Alisia quickly discovered her passion for the legal field and decided to become a paralegal. Alisia is now one of around 100 certified paralegals in the state of Montana. She loves trial work and has assisted on several jury trials, many, many hearings, and specializes in electronic courtroom presentation. Alisia recently spoke at a continuing legal education seminar, “Trial Preparation for Paralegals.” Alisia sits on the Professional Development Committee of the Montana Association of Legal Assistants & Paralegals and is a member of the National Association of Legal Assistants & Paralegals, the Montana Association of Legal Assistants & Paralegals, and the Paralegal Section of the Montana State Bar Association.



Terry Hale, ACP, is a Criminal Investigator with the State of Montana Office of the State Public Defender Office in Missoula, who has over 23 years of legal experience in Criminal Law, Employment Law, Insurance Defense, Medical Malpractice, Personal Injury, Family Law and Civil Litigation. She holds an A.A.S. Degree in Paralegal Studies and a B.A.S. in Sociology - Emphasis in Criminology. She received her CP designation in 2006, ACP designation in Trial Practice in 2007 and ACP designation in Criminal Litigation in 2015. Ms. Hale has been a member of MALA since 1996, currently serving as President for 2018-19 and served as President, Vice-President, NALA Liaison and on all committees over the past 23 years. Ms. Hale has been a member of NALA since 2002, having served on the NALA Board of Directors as Region 8 Director from 2009-2013, NALA’s 2006-2007 CEC Committee and as the 2007-2008 Chair of NALA Campus LIVE! Ms. Hale was an adjunct instructor for the UM-Missoula Paralegal Studies Program and serves as a member of the UM – Missoula Paralegal Advisory Board, a member of the State Bar of Montana Paralegal Section, Veteran Law Section and Criminal Law Section and is a member of the National Defender Investigation Association. Terry and her husband Steve have 4 children together and 6 grandchildren. She loves spending time outside gardening, kayaking, skiing, fishing, and is now working on obtaining her Yoga Teaching Training Certificate so she can work with Veterans and women of Domestic Violence who suf-

Registration Information

MALA is offering this complimentary **FREE** seminar to its members and any NEW members who apply for membership and pay **dues online (\$26.00)** or send in their Membership Application and dues **check for \$30.00** along with their online seminar registration.

MALA Member	FREE
NEW MALA Member	\$26.00 online pricing \$30.00 mail-in application
Non-MALA Member Seminar ONLY:	\$120.00 online pricing \$125.00 mail-in registration
Non-MALA Member Seminar & Lunch:	\$135.00 online pricing \$140.00 mail-in registration

Please confirm your attendance for the seminar and lunch online at www.malanet.org **on or before March 15, 2019**, Due to hotel policy, lunch registration cannot be guaranteed after March 15, 2019. Any food restrictions, please email Terry Hale, ACP at mala@malanet.org.

If you plan on staying in Bozeman—

RESERVE YOUR ROOM TODAY!

A block of rooms has been reserved for Thursday and Friday night at Best Western GranTree Inn. Rates are \$94.00 + tax for a single/double occupancy. **Rooms held at the conference rate until February 21, 2019.**

Reservations can be made by calling **1-406-587-5261** (Discount Code: **MALA0319**).

Mail-in Registration Form

Name _____

E-Mail Address _____

Telephone _____

Employer _____

NOT a MALA member but plan on applying for membership and attending:

- Seminar, Lunch and Meeting
- Seminar Only
- Application for Membership and Dues (\$30.00) **Enclosed**

NOT a MALA member and NOT applying for membership.

I will be attending:

- Seminar and Lunch -----\$ 140.00
- Seminar Only -----\$ 125.00

Amount Enclosed -----\$ _____

****Please note any dietary restrictions** _____

Remit Payment to:

MALA

P.O. Box 9016

Missoula, MT 59807-9016