THE OSGOODE CERTIFICATE IN
FAMILY LAW SKILLS
AND PRACTICE

December 4, 11, 2019, January 16,
February 6, March 5, April 2 & May 13, 2020
In Person

With a faculty of over 15 family court judges,
25 senior practitioners and trained simulated clients

This unique program quickly takes your skills
to a new level by simulating clients and case
files so that you learn-by-doing.

In 7 intensive days over 6 months, you will cover:

• Initial Client Contact and Mastering the Client Intake Interview,
  including limited scope retainers
• Managing Your Client and Working with Self-Reps
• Preparing and Using Financial Statements and Records
• Consensual Resolution
• Options When the Matter Doesn’t Settle
• Motions Advocacy
• Dealing with Experts
• Wrapping Up the File

Make a valuable and lasting investment in your Family Law career
while fulfilling your LSO CPD requirements for both 2019 and 2020.

Register today at:
osgoodepd.ca/family-law-skills

This program is the foundation
that every lawyer who wants to
practise family law needs, and it
is the type of training that most
senior family law lawyers wish
they could deliver, but often can’t
in light of their busy schedules.

Julie K. Hannaford
J K Hannaford Barristers
(Professional Corporation)
The nature of family law makes it one of the most demanding areas of practice. To be effective and successful, you need client management, practice management and legal skills, as well as knowing the law. While many continuing education programs focus on what you need to know, there are few offerings that focus on what you must be able to do. Similarly, many focus on court room proceedings, when in fact, very few matters go to trial.

Developed by senior family law judges, academics and lawyers, The Osgoode Certificate in Family Law Skills and Practice is a one-of-a-kind program that focuses on developing and improving the most frequently used skills of a family law practitioner. In seven intensive days spread out over six months, you will work with a real-life case file, taking it from start to finish. You will acquire a grounding in the foundational knowledge you need, combined with the opportunity to practice core skills in hands-on skills workshops. Specially trained Osgoode Simulated Clients and an expert faculty of the leading judges and family law lawyers will provide you with individualized feedback as you apply your learning and practice your skills in a supportive, no-risk learning environment.

Take this important step in your professional development and refine these essential skills. PLUS fulfill your full LSO CPD requirement for both 2019 and 2020. To ensure interactivity, this program is in-person only. Space is strictly limited, reserve your place now!

Register today at: osgoopedpd.ca/family-law-skills
Participate in this unique practice skills experience and you will learn:

• Why the initial client contact is so important
• How to set the tone and get the information you need in the client intake
• How to conduct an interview with a difficult client
• Tips for managing difficult clients, including the “ostrich” and the “over-communicator”
• When and how to follow up in writing – retainer letters and more
• Types of vulnerable clients you will encounter and how to deal with them
• How to care for yourself while working in this stressful milieu
• The nuts and bolts of financial statements – preparing your client’s and evaluating the other side’s

• Methods and strategies for reaching a settlement
• How to conduct a settlement negotiation
• Managing client expectations
• How to properly document a settlement that’s workable
• Options when agreement cannot be reached and how to assess them
• Efficient and effective motions practice
• When and how to use experts and how to challenge an expert
• Reviewing and using an expert report
• Properly bringing the matter to a close

Also, you will engage in and get feedback on:

• A client interview with a simulated client
• A challenging client meeting with a simulated client
• Preparing portions of financial statements

Who Should Attend

• General practitioners who want to upgrade their substantive knowledge and practical skills in family law
• Legal professionals who are or who plan to specialize in family law
Learn from the best. Our distinguished faculty includes:

**Program Faculty**

**Judges:**
- **The Hon. Justice George Czutrin**
  Senior Family Justice
  Superior Court of Justice
- **The Hon. Justice Victoria R. Chiappetta**
  Superior Court of Justice
- **The Hon. Justice Kendra Coats**
  Superior Court of Justice
- **The Hon. Justice Alex Finlayson**
  Ontario Court of Justice
- **The Hon. Justice R. John Harper**
  Superior Court of Justice
- **The Hon. Justice Francis Kiteley**
  Superior Court of Justice
- **The Hon. Justice Marvin Kurz**
  Superior Court of Justice
- **The Hon. Justice Lene Madsen**
  Superior Court of Justice
- **The Hon. Justice Heather McGee**
  Superior Court of Justice
- **The Hon. Justice Manjusha Pawagi**
  Ontario Court of Justice
- **The Hon. Justice Melanie Sager**
  Ontario Court of Justice
- **The Hon. Justice M. J. Lucille Shaw**
  Superior Court of Justice
- **The Hon. Justice Stanley B. Sherr**
  Ontario Court of Justice
- **The Hon. Justice Victoria Starr**
  Ontario Court of Justice
- **The Hon. Justice Roselyn Zisman**
  Ontario Court of Justice

**Advisory Board**

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  Whitehead Law and Mediation

**Program Director**

**Shelley Kierstead**
Assistant Professor
Osgoode Hall Law School

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osgoodepd.ca/
family-law-skills
### Agenda

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<th>MODULE ONE</th>
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<td><strong>December 4, 2019</strong>&lt;br&gt;<strong>9:00 a.m. - 5:00 p.m.</strong>&lt;br&gt;<strong>Initial Client Contact and Mastering the Client Intake Interview</strong></td>
<td><strong>December 11, 2019</strong>&lt;br&gt;<strong>9:00 a.m. - 5:00 p.m.</strong>&lt;br&gt;<strong>Managing Your Client and Working with Self-Represented Parties</strong></td>
<td><strong>January 16, 2020</strong>&lt;br&gt;<strong>9:00 a.m. - 5:00 p.m.</strong>&lt;br&gt;<strong>How to Prepare and Use Financial Statements and Records</strong></td>
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**Initial client contact** is often the most critical part of the file. You must be able to communicate effectively, know what questions to ask, and be aware of what information your client is not sharing. In this introductory session, learn the key steps, how to avoid common pitfalls, and best practices for ensuring you do it effectively.

- ABC’s of assessing the new client opportunity
- The Client Intake Questionnaire: What, why and how
- Best practices in how to use retainer agreements, including limited scope retainers
- Initial client interview:
  - Assessing if, how, and when
  - How to prepare for the first interview
  - Effective strategies for communicating with your client
  - Identifying special client issues
- What needs to happen after the meeting?
  - Post-meeting reporting (including the engagement OR non-engagement letter)
  - Assessing and communicating options and next steps

**Skills Workshop – Mastering the Client Intake Interview**

*Working with a Simulated Client, you will have an opportunity to conduct an initial intake interview and receive individualized feedback from both the Simulated Client and faculty advisor.*

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<th><strong>MODULE FOUR</strong></th>
<th><strong>February 6, 2020</strong>&lt;br&gt;<strong>9:00 a.m. - 5:00 p.m.</strong>&lt;br&gt;<strong>Consensual Resolution</strong></th>
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This session will focus on options and strategies for reaching a consensual resolution, including negotiation, mediation, and other forms of ADR.

- Overview of the key options (including their advantages, limitations, pitfalls to avoid, etc.)
- How to determine what option is right for your client
- Understanding what your client really wants and how to effectively manage their expectations
- Mediation how-to’s, including the mediation brief
- Minutes of Settlement: why they are critical and how to draft them so that they work

**Skills Workshop – The “Challenging” Client**

*Working with a Simulated Client and a faculty advisor, you will engage in an in-person meeting with a “challenging client”. You will also be asked to draft a brief follow-up communication to the client. The Simulated Client and faculty advisor will provide individualized feedback about the client meeting and the written communication and how you can use these in your practice.*

Most legal professionals do not have a good comfort level with numbers, including financial statements and records. Financial statements, the backbone for many files, are often completed poorly. This session will focus on the importance of accurate and timely financial statements; strategies for navigating these complex issues with confidence; and how to effectively use the other side’s financial statements and records.

**Skills Workshop – Understanding Financial Statements**

*You will have the opportunity to complete segments of a Financial Statement and receive individualized feedback from a faculty advisor.*
Skills Workshop #1 – Simulated Negotiation
Working with a Simulated Client and faculty advisor, you will have an opportunity to participate in a simulated negotiation and receive feedback on your performance.

Skills Workshop #2 – Drafting Minutes of Settlement
You will have the opportunity to draft Minutes of Settlement and receive individualized feedback from the faculty advisors.

MODULE FIVE
March 5, 2020
9:00 a.m. – 5:00 p.m.
When Your Matter Doesn’t Settle
In this session you will drill down on the different non-consensual options in a family law matter, including Court and arbitration.
• Overview of the key options (including their advantages, limitations, pitfalls to avoid, etc.)
• Strategies for assessing and communicating with your client about the options and process
• Best practices for:
  - Trial management/case conferences
  - Affidavits
  - Examinations
  - Settlement conferences

Skills Workshop – Case Conference
Using the sample case file, and working with a Simulated Client and faculty advisor, you will have an opportunity to participate in a simulated case conference. Receive feedback on your performance, including personalized strategies you can immediately put to use.

MODULE SIX
April 2, 2020
9:00 a.m. – 5:00 p.m.
Motions Advocacy
Family law motions are often where many files are “won” and “lost”. Mastering the motion is a key skill.
• How to assess IF and WHEN to bring a motion
• Strategies for determining what your client needs
• Guidance from judges about what they want and need from counsel
• Best practices for:
  - Preparing for Court
  - Organizing your materials
  - Structuring your written materials
  - Structuring your oral submissions

Skills Workshop – Effective Motion Advocacy
Students will have an opportunity to participate in a simulated motion and perform in front of Family Court judges. Hone your advocacy skills in a supportive environment, and receive individualized feedback from faculty advisors and judges about what worked and what didn’t.

MODULE SEVEN
May 13, 2020
9:00 a.m. – 5:00 p.m.
Critical Issues: Working with Experts and Wrapping Up The File
Dealing with Experts
Expert evidence can be complex. Knowing if and how to use your (and challenge the other side’s) expert is a key skill. Mistakes can be fatal – and costly.
• Assessing if and when to retain an expert
• Retainer agreements (including joint retainers)

• Best practices and pitfalls to avoid when using an expert
• How to effectively review and use the expert’s report
• Strategies for challenging the other side’s expert

Wrapping Up The File
The program will conclude with a discussion of the key steps and processes involved in closing the file, including:
• How to ensure that the outcome will work for your client
• Enforcement (strategies and best practices)
• Final client communication

Register today at:
osgodepd.ca/family-law-skills
Registration Details

Regular Fee per Delegate:
$2,795 plus HST ($399/day)

New Licensee (2016-present):
$1,795 plus HST ($256/day)

Fees include attendance, program materials, lunch and break refreshments. Visit www.osgoodepd.ca/financial-assistance for details about financial assistance. *Purchase of individual modules is not available.*

Program Changes
We will make every effort to present the program as advertised, but it may be necessary to change the date, location, speakers or content with little or no notice. In the event of program cancellation, York University’s and Osgoode Hall Law School’s liability is limited to reimbursement of paid fees.

Cancellations and Substitutions
Substitution of registrants is permitted at any time. If you are unable to find a substitute, a full refund is available if a cancellation request is received in writing 21 days prior to the program date. If a cancellation request is made with less than 21 days notice, a $150 administration fee will apply. No other refund is available.

For Further Program–Related Information Please Contact:
Alison Hurst, Program Lawyer at 647 241 2537, or email ahurst@osgoode.yorku.ca

Certificate of Program Completion
You will receive The Osgoode Certificate in Family Law Skills and Practice upon completion of all program modules and participation in the skills workshops.

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