

NEW!

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

Program Director

Shelley Kierstead
Assistant Professor
Osgoode Hall Law School

Location

Osgoode Professional
Development
1 Dundas St. W., 26th Floor
Toronto, ON

“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 Osgoode Certificate in Family Law Skills and Practice

PRACTICAL HANDS-ON LEARNING.

During the program, you will engage in learn-by-doing workshops. You will work with trained Simulated Clients and get individualized feedback about both your advocacy skills and your ability to communicate and interact with clients.

WHAT IS A SIMULATED CLIENT?

Trained by Osgoode Hall Law School, our Simulated Clients are a select group of professionals who have received in-depth training in typical client behaviours. They are also trained on how to assess and provide feedback about your performance.

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!

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[osgoodepd.ca/
family-law-skills](https://osgoodepd.ca/family-law-skills)



Program At-A-Glance

- **Module One** – December 4, 2019
Initial Client Contact and Mastering the Client Intake Interview
- **Module Two** – December 11, 2019
Managing Your Client and Working with Self-Reps
- **Module Three** – January 16, 2020
How To Prepare and Use Financial Statements and Records
- **Module Four** – February 6, 2020
Consensual Resolution
- **Module Five** – March 5, 2020
When Your Matter Doesn't Settle
- **Module Six** – April 2, 2020
Motions Advocacy
- **Module Seven** – May 13, 2020
Dealing with Experts and Wrapping Up the File

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
- Conducting a case conference
- Arguing a simulated motion in front of real Family Court judges

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 Director

Shelley Kierstead

Assistant Professor
Osgoode Hall Law School

Advisory Board

Adam Black

Torkin Manes LLP

Aaron Franks

Epstein Cole LLP

Kathryn Hendrikx

Hendrikx Family Law

Janet Whitehead

Whitehead Law and Mediation

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

William H. Abbott, MacDonald & Partners LLP

Anna M. Barrett, BSc, CPA, CA, CBV, CFF, Marmer Penner Inc.

Yvonne Bernstein, LAWPRO

Georgina L. Carson, MacDonald & Partners LLP

Erin Crawford, Grant Crawford & Watson LLP

Dani Z. Frodis, Frodis Family Law

Doron Gold, BA, JD, MSW, RSW, CPCC, Staff Clinician Homewood Health

Julie K. Hannaford, J K Hannaford Barristers

Heather Hansen, Martha McCarthy & Company LLP

Farrah Hudani, Christen Seaton Burrison Hudani LLP

Gary S. Joseph, MacDonald & Partners LLP

George Karahotzitis, Thomson, Rogers

Maxine M. Kerr, Barrister & Solicitor

Christine Kim M.S.W., Christine Kim Mediation

Michael B. Kleinman, Kleinman Gordon Family Law

Alfred A. Mamo, McKenzie Lake Lawyers

Deepa Mattoo, LLB, MBA, PGD, Executive Director, Barbra Schlifer Commemorative Clinic

Judith M. Nicoll, McInnis & Nicoll

Richard Niman, Niman Mamo LLP

Kristen Normandin, Normandin Chris LLP

Steve Z. Ranot, CPA, CA•IFA, CBV, Marmer Penner Inc.

Avra Rosen, Rosen Sack LLP

Charu Ruparelia, J K Hannaford Barristers

Michael Stangarone, MacDonald & Partners LLP

Paula White, CPA, CA, CBV, White & Lewis

Frances M. Wood, Wood Gold LLP

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Agenda

MODULE ONE

December 4, 2019
9:00 a.m. – 5:00 p.m.

Initial Client Contact and Mastering the Client Intake Interview

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.

MODULE TWO

December 11, 2019
9:00 a.m. – 5:00 p.m.

Managing Your Client and Working with Self-Represented Parties

Knowing how to effectively manage your client is crucial. Every legal professional has war stories about that difficult client. Judges frequently chastise counsel for failing to properly manage their client. In addition to managing the “difficult” or high conflict client, legal professionals need to be able to identify and know how to support vulnerable clients. This session will also provide guidance on how to work with self-represented parties.

- Best practices and strategies for managing client expectations
- How to effectively communicate with the “ostrich” client and the “over-communicator”
- Understanding the unique issues of vulnerable clients and how these may impact behaviour and decision making
- Self-care: strategies for how legal professionals can and should support themselves when dealing with challenging clients
- Self-represented parties: Counsel's role and obligations, including what the Court expects from counsel

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.

MODULE THREE

January 16, 2020
9:00 a.m. – 5:00 p.m.

How to Prepare and Use Financial Statements and Records

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.

MODULE FOUR

February 6, 2020
9:00 a.m. – 5:00 p.m.
Consensual Resolution

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 #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

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family-law-skills](https://osgoodepd.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.

 osgoodepd.ca Osgoode Professional Development
 416.597.9724 1 Dundas Street West, Suite 2600
 @OsgoodePD Toronto, ON Canada M5G 1Z3

Register today:

osgoodepd.ca/family-law-skills

Participants from past
OsgoodePD family law
programs have said:

“Struck the right note for senior counsel and those less familiar with family law concepts. Complex issues well explained and clarified.”

Elisabeth Sachs
Elisabeth Sachs Law Office

“Jam packed with informative and up-to-date information.”

Marvin Kurz
Dale Streiman & Kurz LLP

“The materials and presenters were very helpful and engaging.”

“This CPD was thought-engaging, and it identified “real-life” issues faced by family law lawyers and Judges.”

“Presentations were clear, relevant, well executed, interesting and easy to watch.”



OsgoodePD has been approved as an Accredited Provider of Professionalism Content by the LSO.

Eligible CPD Hours – LSO (ON): 48h CPD (39h Substantive; 6h Professionalism; 3h EDI)



OsgoodePD programs may be eligible for CPD/MCLE credits in other Canadian and US jurisdictions. To inquire about credit eligibility, please contact cpd@osgoode.yorku.ca.