

NACTT

NATIONAL ASSOCIATION OF CHAPTER 13 TRUSTEES



NACTT 2018 Staff Symposia Series

*Three Little Birds singing:
"Everything is gonna be alright"*



(Please complete a separate form for each attendee.)

Attendee's Name: _____
(Please print name to appear on name tag- First & Last.)

Office Position: _____

Trustee's Name: _____

Address: _____

City, State, Zip Code: _____

Participant's Email Address: _____

Office Contact Name, Telephone, Email Address: _____

Emergency Contact and Telephone: _____

In the following sections, please check your session choices. Choose only one per section.

Evening Prior to Symposium: Registration and Opening Reception: 5:30 p.m. to 7:00 p.m.

Day 1: Registration and Breakfast: 8:00 a.m. to 9:00 a.m.
Lunch (Provided): 12:15 pm to 1:30 p.m.
General Session 3:15 p.m. to 4:45 p.m.
Breaks: 15 minutes each between Sessions 1 and 2 and Sessions 3 and 4.

Session 1 (9:00 - 10:30):

- | | |
|--|--|
| <input type="checkbox"/> Bankruptcy All Day Every Way (BADEW) | <input type="checkbox"/> (Denver Only) Staff Attorney: New Rules, New Forms, New Rules |
| <input type="checkbox"/> BADEW: " JAMMIN " | |
| <input type="checkbox"/> Leadership: The Penguin: Leading When You Cannot Fly | <input type="checkbox"/> (Denver Only) Office Managers/Comptrollers: Legal Update |
| <input type="checkbox"/> Paralegals/Case Administrators: Pre 341 | <input type="checkbox"/> (Baltimore Only) IT Track: PII Data Management Plans, Practices and Strategies |

Session 2 (10:45 - 12:15):

- | | |
|--|--|
| <input type="checkbox"/> BADEW: Mistakes: Man! That was a bone-head move. | <input type="checkbox"/> (Denver Only) Staff Attorney: The Human Side of Chapter 13 |
| <input type="checkbox"/> Leadership: Geese: Everyone Is a Leader | <input type="checkbox"/> (Denver Only) Office Managers/Comptrollers: FAIL!!! |
| <input type="checkbox"/> Paralegals/Case Administrators: Confirmation | <input type="checkbox"/> (Baltimore Only) IT Track: Cloud Migration |



NACTT 2018 Staff Symposia Series - Registration (continued)

Session 3 (1:30 - 3:00):

- | | |
|--|---|
| <input type="checkbox"/> BADEW: Final Audit: When the Door Closes | <input type="checkbox"/> (Denver Only) Staff Attorney: Doing the Things the Trustee's Gotta Do |
| <input type="checkbox"/> Leadership: Core Values of a Hummingbird | <input type="checkbox"/> (Denver Only) Office Managers/Comptrollers: FAIL AGAIN?!?! |
| <input type="checkbox"/> Paralegals/Case Administrators: "Fussin and Fightin" | <input type="checkbox"/> (Baltimore Only) IT Track: Security Standards And Audits |

Session 4 (3:15 - 4:45):

- | | |
|--|---|
| <input type="checkbox"/> General Session
Darrin Zeer – America's Relaxation Expert and Best Selling Author | <input type="checkbox"/> (Denver Only) Staff Attorney: A Review of Ethical Considerations in Dealing with Bankruptcy Cases |
| | <input type="checkbox"/> (Baltimore Only) IT Track: Solving the Tough Problem |

Day 2: Breakfast: 7:30 a.m. to 8:30 a.m.
Break: 15 minutes between Sessions 5 and 6.

Session 5 (8:30 - 10:00):

- | | |
|--|--|
| <input type="checkbox"/> BADEW: Three Little Birds: Or is it Three Little Years | <input type="checkbox"/> (Denver Only) Staff Attorney: Plan Completion and Discharge Issues |
| <input type="checkbox"/> Leadership: Crows vs. Owls Confrontation and Conflict | <input type="checkbox"/> (Denver Only) Office Managers/Comptrollers: Would You Use You? |
| <input type="checkbox"/> Paralegals/Case Administrators: "Stir It Up" Because Life is Not Static: Post Confirmation Modifications | <input type="checkbox"/> (Baltimore Only) IT Track: System Management And Automation |

Session 6 (10:15 - 11:45):

- | | |
|--|--|
| <input type="checkbox"/> BADEW: Mortgage: Feeling like a drowned rat? | <input type="checkbox"/> (Denver Only) Staff Attorney: Case Law Update |
| <input type="checkbox"/> Leadership: Ask Polly: Q&A Roundtable | <input type="checkbox"/> (Denver Only) Office Managers/Comptrollers: Round Table Discussion |
| <input type="checkbox"/> Paralegals/Case Administrators: Free As a Bird? Discharge, or not, that is the question. | <input type="checkbox"/> (Baltimore Only) IT Track: Programming for the Trustee Office |

Adjournment: 11:45 a.m.



NACTT 2018 Staff Symposia Series - Dates and Locations

Please check the symposium location you will be attending. Contact the hotels directly to make your hotel reservations. Advise the hotel that you are part of the NACTT Staff Symposium.

Denver, Colorado
March 8 and 9, 2018
Classes: Thursday and Friday
Reception: Wednesday, March 7, 2018
Registration Deadline: February 14, 2018

Sheraton Denver Downtown Hotel
 1550 Court Place
 Denver, CO 80202
 (888) 627-8405 or (303) 893-3333
 Room Rate: \$189 per night
Reservations Deadline: February 14, 2018

Baltimore, Maryland
May 17 and 18, 2018
Classes: Thursday and Friday
Reception: Wednesday, May 16, 2018
Registration Deadline: April 18, 2018

Baltimore Marriott Inner Harbor at Camden Yards
 110 South Eutaw Street
 Baltimore, MD 21201
 (800) 228-9290 or (410) 962-0202
 Room Rate: \$185 per night
Reservations Deadline: April 18, 2018

Airline Discount Code

American A9118SS Delta NMR2H United ZEAP377871

Registration Fees

\$400 (advance registration) to attend both days of the Symposium. Includes breakfast on both days and lunch on the first day. Fee is based on registration prior to the deadlines listed above.

Please check mark the box to the right if you have pre-paid with FY'17 funds:

\$450 (late registration) to attend both days of the Symposium. This will include breakfast on both days and lunch on the first day. This price is based on registration after the deadlines listed above.

Method of Payment

Check (preferred*) MasterCard Visa American Express

(*Please pay by check if possible - the NACTT has to pay a fee to use MasterCard, Visa, and American Express)

Card Number: _____ Expiration Date: _____ Security Code: _____

Signature: _____ Print Name: _____

Address: _____

City, State, and Zip Code: _____

*****For Staff Attorney Registration Only: List any state you plan to apply for CLE: _____*****

Please complete all pages of the registration form and submit one registration per attendee by:
Email: courtney@jee.com or Fax: 1-803-765-0860 or Mail: NACTT, 1 Windsor Cove, Suite 305, Columbia, SC 29223

ATTENDEES SHOULD KEEP A COPY OF THIS FORM TO BRING WITH THEM TO THE SYMPOSIUM.

Advance registration is required for all attendees.

There are no provisions for parties traveling with attendees, this includes the Reception.

REFUND POLICY: Paid Registrations may be transferred to another city. NO REFUNDS after February 1st

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Bankruptcy All Day Every Way

Presenters:

- Hershell Bell, Office of Tammy Terry, Trustee, Detroit, MI
- Sarah Camp, Office of Mary Ida Townson, Trustee, Atlanta, GA
- Kathy Westbrook, Office of Robert Wilson, Trustee, Lubbock, TX

Session 1: "JAMMIN"

As Bob Marley would say "Oh yeah, Well alright, We're Jammin, Sing it, I want to jam it with you, we're Jammin, we're Jammin, And I hope you like jamming it too, Ain't no rules, Ain't no how, you can do it anyhow, every day we pay the price, come a little sacrifice". We all know in life change is the only thing guaranteed, but sometimes it's difficult to implement. So we will be Jammin to change the mindset from paper to paperless!

Session 2: MISTAKES: Man! That was a bone-head move.

"The greatness of a man is not in how much wealth he acquires, but in his integrity and his ability to affect those around him positively." Bob Marley stated no truer words. How we react in difficult times and when we've made a boo-boo can often tell more about us than we want. So, what are some of the mistakes that we make in the Bankruptcy world that can have a ripple effect? Come and explore with us!

Session 3: FINAL AUDIT: When the Door Closes.

Bob Marley stated, "When one door is closed, don't you know that many more are open." This is not only an adage on when one door closes, another opens, but it serves to remind us that the Final Audit is a liberating, fresh beginning for debtors. Come explore the different stages of the Final Audit.

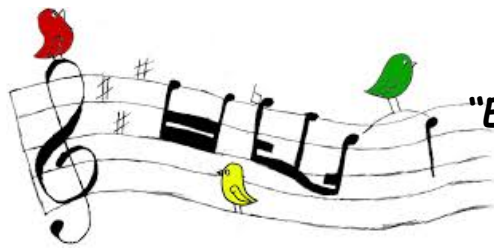
Session 5: THREE LITTLE BIRDS ... OR IS IT THREE LITTLE YEARS.

Bob Marley said "Money is numbers and numbers never end. If it takes money to be happy, your search for happiness will never end." Well we all know money isn't everything but it is when a debtor has been driven to the decision that Bankruptcy is the only place where "... every little thing gonna be alright". So let's get together to discuss how we move forward when we receive large amounts of monies that will either reduce the amount owed by the debtor into the case or shorten the length of the debtor's bankruptcy case.

Session 6: MORTGAGE: Feeling like a drowned rat?

Bob Marley stated, "Some people feel the rain. Others just get wet." He believed that rain doesn't necessarily have to be a bad thing and we think that Mortgages do not have to be either. Rather than feeling like a drowned rat on a sinking ship, come and learn about conduit, pre-petition arrears, post-petition fees and charges, and mortgage payment changes. Let us help turn the torrential rains of hurricane Harvey into a gentle spring rain when it comes to Mortgages!

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Leadership



Presenters:

- Merideth Akers, Office of Brad Caraway, Trustee, Birmingham, AL
- Brenda Dickerson, Office of Sylvia Ford Brown, Trustee, Memphis, TN
- Beckie Hadley, Office of Barbara Foley, Trustee, Kalamazoo, MI

Session 1: The Penguin: Leading When You Cannot Fly

The greatest myth of leadership is that you must be the one in charge in order to lead. In the Trustee world, most offices have very few supervisors, and many other staff. This session will fill you in how you can still influence, regardless of position and authority.

Session 2: Geese: Everyone Is a Leader

Managers are not always leaders, and leaders are not always managers. Giving employees the ability to show their natural leadership tendencies is a wonderful way to build a level playing field in a Trusteeship. This session will talk about how allowing leadership with every employee can promote creative solutions, growth and teamwork.

Session 3: Core Values of a Hummingbird

Do you ever feel like you're only a small part in the grand scheme of the bankruptcy world? Or feel that what you're doing is so minute that it doesn't even make a difference? This session will explore some core values necessary for anyone to be integral part of their office.

Session 5: Crows vs. Owls: Confrontation and Conflict

The only things certain in life are death and taxes.....and conflicts at the office. It doesn't matter how warranted or frustrating, the office is no place to lose your cool. There is a right way and a wrong way to confront the office drama. In this session we will talk about different styles of conflict and multiple ways to confront them.

Session 6: Ask Polly: Q & A Roundtable

You probably don't want to know if anyone has a cracker, but you may wonder if other offices allow cracker eating at individual desks. Each Trustee differs, as does each Trusteeship, but it's sometimes nice to find out what other offices do in certain circumstances. This session will focus on topics that the participants wish to talk about, so we will ask for suggestions (anonymous, if that helps) throughout the other sessions and lead a roundtable discussion.

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Paralegal & Case Administrator Track

Presenters:

- Vanessa Guerrero, Office of Mary K. Viegeln, Trustee, San Antonio, TX
- Cindy Graber, Office of Deb Miller, Trustee, South Bend, IN
- Monica Martin, Office of Wayne Godare, Trustee, Portland, OR

Session 1: Pre 341

A Chapter 13 Trustee must review a number of documents and pleadings including the Petition, schedules of assets and liabilities, Statement of Financial Affairs [SOFA], Plan, sources of income, and tax returns for consistency and completeness. As such, how should each Chapter 13 case be scrutinized prior to the 341 meeting of creditors? What is important or relevant? This session is designed to answer these questions. In this session we will provide an in depth analysis into a debtor's claim of exemptions, "Best Interest of Creditors" test, Form 122C "Means test," plan feasibility, etc. The focus of this session will be on tools utilized by different trusteeships when reviewing the schedules, SOFA, and Plan.

Session 2 – Confirmation

The session is designed to provide a comprehensive review of analyzing the notes (and testimony of a debtor) from the 341 meeting of creditors in determining whether to recommend, or object to, confirmation. We will focus on the Bankruptcy Code's requirements for confirmation and the various formats utilized by Chapter 13 Trustees in objecting to confirmation. In this session, we will also discuss the roles of paralegals and/or case administrators in assisting staff attorneys in preparing for confirmation.

Session 3 – "Fussin and Fightin"

The Bankruptcy Code empowers Chapter 13 Trustees with the capability of maximizing the value of an estate vis-à-vis "strong arm powers" and ensuring a debtor gets a fresh financial start at the end of the bankruptcy process. This session will explore various actions by Trustees against creditors, including but not limited to, objection to claims; exercise of avoidance powers related to preferences, fraudulent transfers, lien avoidances and post petition transfers; Objections to Notice of Post Petition Mortgage Fees, Expenses and Charges; and Motions to Deem Mortgage Current.

Session 5 – "Stir It Up" Because Life is Not Static: Post Confirmation Modifications

A debtor's circumstances will more likely than not change after confirmation of a Plan. As life for a debtor continues, his or her financial circumstances may decline or may improve. Life is not static; and the Bankruptcy Code contemplates this. This presentation will delve into reasons why a debtor in bankruptcy might file a motion to modify, motion to sell, etc.. We will discuss the requirements regarding modifications; sale of an asset; and other provisions of the Code affected by a debtor's actions. In addition, we will discuss motions to modify filed by the Chapter 13 Trustee to increase the dividend to unsecured creditors on account of increased earnings, other sources of income, and acquisition of real or personal property.

Session 6 – "Turn Me Loose"

A primary goal of a debtor in bankruptcy is the discharge of his or her debts. Obtaining a discharge, however, is not without limitations. This session will discuss the requirements for Chapter 13 discharge and Chapter 13 hardship discharge; exceptions of discharge; and denial of discharge. This session is designed to for you to learn about issues that others have faced as it relates to discharge and how they were resolved.

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**Staff Attorney
(Denver Only)**



Presenters:

- Phil Lamos, Office of Lauren Helbling, Trustee, Cleveland, OH
- Anthony Olivadoti, Office of Marilyn Marshall, Chicago, IL
- Sarah Smith, Office of Kathleen Leavitt, Trustee, Las Vegas, NV

Session 1: New Rules, New Plan Forms, New Rules

We waited for the National Model Plan to take effect for so long and few will use it. We will look at the new Plan, Forms and Rules and what impact they are having on bankruptcy administration.

Session 2: *Adam and Eve: The human side of Chapter 13*

Can anyone file Chapter 13? What happens when a debtor doesn't have the capacity to file on their own? Or, can a case proceed if a debtor dies prior to confirmation, or after? How does the age, capacity or health of the debtor impact the Chapter 13 process?

Session 3: *Get Up Stand Up: Doing the Things the Trustee's Gotta Do*

Sometimes the Trustee has to do things that might ordinarily be the Debtor's responsibility. When should the Trustee move to strip a lien? Is it the Trustee's responsibility to object to claims? What's a Trustee to do when it comes to preferences and fraudulent transfers? In this session we'll talk about the duties of the Trustee and what the Trustee can do when the Debtor won't or can't do something.

Session 4: *I Shot the Sheriff: A Review of Ethical Considerations in Dealing With Bankruptcy Cases*

Sometimes it is hard to tell right from wrong and how we make sure we stay on the right side.

Session 5: *Jammin' [to the end]: Plan Completion and Discharge Issues*

Is the debtor eligible for a discharge? How does debtor's eligibility for a discharge affect confirmation of the plan? If a debtor is not eligible, what steps are required of the Trustee to ensure no discharge will be issued? What is considered plan completion? What do we mean by "all payments under the plan"? What happens when a debtor seeks a hardship discharge?

Session 6: *Simmer Down: Case Law Update*

What issues have the various courts settled over the past year? What issues have they made more confusing? In this session we'll review various decisions from the past year. Identifying which (and where) issues have been settled, and which (and where) issues might be more confusing than ever.

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Office Managers/ Comptrollers (Denver Only)

Presenters:

- Chuck Hadley, Office of Barbara Foley, Trustee, Kalamazoo, MI
- Amy Kopp, Office of Pam Bassel, Trustee, Fort Worth, TX
- Julie Waters, Office of Dan Brunner, Trustee, Spokane, WA

Session 1: LEGAL UPDATE

A little bird told me it is important to keep up on the latest changes in employment laws. This session will update you on any recent laws passed, any major court case outcomes and any important legislation that will be worth following in the months to come.

Session 2: FAIL!!!

But it's gonna be alright! We all have failures, but the important thing is what you learn from them. Our presenters will humbly throw our biggest failures out to the audience, accompanied with the lessons learned and the impact it had on our organization, our job and our career. This interactive session promises to be entertaining, but reassuring that we can all learn from our mistakes.

Session 3: FAIL AGAIN?!?!

Don't worry about a thing, we can fix this. Every day has the potential to turn into a crisis. Handling other people's failures takes a deft touch, as well as the confidence of the staff to bring up a problem, not run away from it and to let it grow unchecked. Let's talk about pro-active management styles to help gain staff trust and personal poise in the face of a someone else's failure.

Session 5: WOULD YOU USE YOU?

It's a new morning in the office. Does the new Trustee think the organization is as efficient as it should be? This session will focus on Trustee transition and lessons learned from all of you about controls, budgets, relocations, and continuity. Can you change your environment now to ensure a smooth transition? Come share your experiences, we can all learn your from successes and failures.

Session 6: ROUND TABLE DISCUSSION

Our message to you is that none of us is as smart as all of us. So let's talk about some hot topics in our Chapter 13 world. Effects of the new rule changes, leave time, flex time and any other policy question that needs a discussion.

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**IT Track
(Baltimore Only)**



Presenters

- Tom O'Hern, STACS Program Manager for ICF, Baltimore, MD
- Harold Garcia, System Manager for Melissa Davey, Atlanta, GA
- James Smiley, System Manager for Bill Miller, Philadelphia, PA
- Debbie Smith, System Manager for Al Russo, Robbinsville, NJ

Session 1: PII Data Management Plans, Practices and Strategies

Businesses have legal liabilities and responsibilities to protect Personally Identifiable Information (PII) they receive, process and distribute. Developing a data management strategy to minimize PII within Trustee operations and computer systems is necessary to limit the risk and impact of a data breach. Processes, practices and technical options to develop a custom strategy will be discussed with examples of easy win items to jumpstart your internal efforts.

Session 2: Cloud Migration

What will your office computing environment look like in 3-5 years? Small businesses adopting cloud-based solutions and moving onsite computing environments to hosted cloud service providers continues to be one of the fastest growing service markets. This session provides an overview of cloud technology service models, their impact on traditional computing practices, then discusses implementation issues and migration strategies for a variety of cloud technologies and services for the 13 community.

Session 3: Security Standards and Audits

A guest speaker from ICF's Computer Network Defense team will discuss current threats and attacks with a special focus on the cloud and the security challenges it presents. Industry standards and practices used by STACS to help Trustees integrate business practices for IT Governance, Risk management and Compliance will be presented along with several new and existing program features. A grab bag of security topics and questions from the community will also be discussed.

Session 4: Solving the Tough Problem

Internal and external information sharing can be challenging for a Trustee office. This session discusses and demos inexpensive tools and products available to improve internal communications, sharing information inside and outside the office, and day to day administration and project management tasks. Inter-office chat, information web portals, and document sharing will be the focus.

Session 5: System Management and Automation

Centralized administration and automation are necessities for effective systems management. The session reviews and demos features of centralized administration tools. It provides demos and examples on how to do more with group policy such as installing software, configuring user desktop environments, automating new system setup and implementing important security and system settings.

Session 6: Programming for the Trustee Office

Basic programming and scripting skills can help system managers automate support tasks and improve business processes. This session covers how to setup a development environment and provides a basic overview of commonly used programming and scripting languages. It then takes a deeper dive into specific programming and scripting solutions to automate common tasks in a Trustee office.