

NACTT

NACTT 2021 Staff Symposia Series



(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: Opening Reception: 6:00 p.m. to 7:00 p.m.

Day 1:

Session 1:

- | | |
|--|---|
| <input type="checkbox"/> General Session | <input type="checkbox"/> (Charlotte Only) Staff Attorney: Ramifications of the Pandemic, Part I. |
| | <input type="checkbox"/> (Charlotte Only) IT Track: A Pandemic of Lessons Learned |

Session 2:

- | | |
|--|--|
| <input type="checkbox"/> Bankruptcy A-Z: In the middle of every difficulty lies opportunity | <input type="checkbox"/> (Charlotte Only) Staff Attorney: Ramifications of the Pandemic, Part II. |
| <input type="checkbox"/> Leadership: 20/20 Vision in 2021: Surviving the Pandemic | <input type="checkbox"/> (Long Beach Only) Office Managers/Comptrollers: Getting Back to Business in the Time of COVID-19 |
| <input type="checkbox"/> Paralegals/Case Administrators: Case Prep / 341 Virtual Meetings | <input type="checkbox"/> (Charlotte Only) IT Track: Coding Your Way to the Top |

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NACTT 2021 Staff Symposia Series - Registration (continued)

Session 3:

- | | |
|---|--|
| <input type="checkbox"/> Bankruptcy A-Z: One of the most important things you can do on this earth is to let people know they are not alone. | <input type="checkbox"/> (Charlotte Only) Staff Attorney: Notice of Final Cure. |
| <input type="checkbox"/> Leadership: Are You Thriving or Merely Surviving? | <input type="checkbox"/> (Long Beach Only) Office Managers/Comptrollers: Managing and Motivating Remote Employees |
| <input type="checkbox"/> Paralegals/Case Administrators: Preparation for Confirmation | <input type="checkbox"/> (Charlotte Only) IT Track: Be Kind To Your Future Self, You Earned It |

Day 2:

Session 4:

- | | |
|---|--|
| <input type="checkbox"/> Bankruptcy A-Z: Difficult roads often lead to beautiful destinations. | <input type="checkbox"/> (Charlotte Only) Staff Attorney: Ethics & Professionalism: Living in a Virtual World. |
| <input type="checkbox"/> Leadership: 7 Most Important Types Of Motivation | <input type="checkbox"/> (Long Beach Only) Office Managers/Comptrollers: Take the Lead...A Guide to Practicing Wellness |
| <input type="checkbox"/> Paralegals/Case Administrators: Claims | <input type="checkbox"/> (Charlotte Only) IT Track: Stepping Carefully Onto The Cloud |

Session 5:

- | | |
|---|--|
| <input type="checkbox"/> Bankruptcy A-Z: You cannot expect victory and plan for defeat. | <input type="checkbox"/> (Charlotte Only) Staff Attorney: Claims Review |
| <input type="checkbox"/> Leadership: 7 Harsh Truths That Will Improve Your Leadership Skills Overnight | <input type="checkbox"/> (Long Beach Only) Office Managers/Comptrollers: Audit Preparation |
| <input type="checkbox"/> Paralegals/Case Administrators: Modifications | <input type="checkbox"/> (Charlotte Only) IT Track: Emotional Intelligence & Other Things I Had to Google |

Session 6:

- | | |
|--|---|
| <input type="checkbox"/> Bankruptcy A-Z: It's not whether you get knocked down; it's whether you get back up. | <input type="checkbox"/> (Charlotte Only) Staff Attorney: Things to Come: Case Law Update |
| <input type="checkbox"/> Leadership: Question!! Q & A Session | <input type="checkbox"/> (Long Beach Only) Office Managers/Comptrollers: Roundtable |
| <input type="checkbox"/> Paralegals/Case Administrators: Discharge | <input type="checkbox"/> (Charlotte Only) IT Track: Leveraging STACS features to combat evolving threats |

Adjournment:

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NACTT 2021 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.

- | | | |
|--------------------------|---|--|
| <input type="checkbox"/> | Long Beach, California
March 4 and 5, 2021
Classes: Thursday and Friday
Reception: Wednesday, March 3, 2021
Registration Deadline: February 10, 2021 | Renaissance Long Beach Hotel
111 East Ocean Boulevard
Long Beach, CA 90802
NACTT Room Block is not yet open
Room Rate: \$189 per night
Reservations Deadline: February 10, 2021 |
| <input type="checkbox"/> | Charlotte, North Carolina
April 8 and 9, 2021
Classes: Thursday and Friday
Reception: Wednesday, April 7, 2021
Registration Deadline: March 12, 2021 | Charlotte Marriott City Center
100 W Trade Street
Charlotte, NC 28202
NACTT Room Block is not yet open
Room Rate: \$199 per night
Reservations Deadline: March 12, 2021 |

Airline Discount Code

American **TDB** Delta **TDB** United **TBD**

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'20 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 before March 5th.

NO REFUNDS after February 1st

NACTT 2021 Staff Symposia Series



Bankruptcy A-Z

Presenters:

- Sarah Camp, Office of Mary Ida Townson, Trustee, Atlanta, GA
- Shannon Horton, Office of Krispen Carroll, Trustee, Detroit, MI
- Holly Jamjoo, Office of Mary Viegelahn, Trustee, San Antonio, TX

Session 2: In the middle of every difficulty lies opportunity – Albert Einstein

How well did your office handle communication during the pandemic? What changes did you have to make? How did court hearings change? We will explore the different ways communication changed and what the future holds for staying connected.

Session 3: One of the most important things you can do on this earth is to let people know they are not alone – Shannon L Alder

How to build a website to help your office stay connected. We will show you the behind the scenes of building a website using Weebly.com.

Session 4: Difficult roads often lead to beautiful destinations

Since John Johnson was able to make it through a confirmation hearing last year, we will see what happens with 4 different miscellaneous motion hearings.

Session 5: You cannot expect victory and plan for defeat – Joel Osteen

We will explore how the Cares Act changed the bankruptcy world and what the forbearance period means for mortgages.

Session 6: It's not whether you get knocked down; it's whether you get back up. – Vince Lombardi

What does the finance department do all day? How does the Trustee fee work? What happens when money comes back? How did the pandemic affect disbursements? Join us to learn more about the financial side of the Trustee's office.

NACTT 2021 Staff Symposia Series



Leadership

Presenters:

- Merideth Akers, Office of Brad Caraway, Trustee, Birmingham, AL
- Brenda Dickerson, Office of Sylvia Ford Brown, Trustee, Memphis, TN
- David Schrempf, Office of Ronda Winnecour, Trustee, Pittsburgh, PA

Session 2: 20/20 Vision in 2021: Surviving the Pandemic.

What is unfolding as a result of the COVID-19 pandemic is a reawakened sense of life's meaning and purpose, recognition of our hidden strengths, and willingness to tap into our core goodness and generosity. We are learning a lot about ourselves, which benefits everyone. In this session, we will discuss what we have learned and how we move forward.

Session 3: Are You Thriving or Merely Surviving?

There's a huge difference between surviving and thriving. Survive means to continue to live or exist, especially in spite of danger or hardship. Thrive means to prosper, be fortunate or successful, to grow or develop vigorously, and to flourish. In this session, we will discuss how to move from merely surviving to thriving.

Session 4: 7 Most Important Types of Motivation

A good leader knows how to motivate his or her employees. When considering how to motivate your team, an effective leader must keep in mind that there are differing types of motivation. In this session, we will discuss differing methods for motivating differing personalities.

Session 5: 7 Harsh Truths That Will Improve Your Leadership Skills Overnight.

If you find yourself in the precarious position of wondering "where do I stand as a leader," at some point you must face some brutal truths about what it takes to motivate and inspire on a human, emotional, and psychological level. In this session, we will discuss these seven truths.

Session 6: Good Question!!! - Q & A Session

In this session, we will address your questions, discuss the topics that you want to discuss, and most importantly... hear your opinions and feedback on issues facing leaders.

NACTT 2021 Staff Symposia Series



Paralegal & Case Administrator Track

Presenters:

- Jennifer Bellman, Office of Naliko Markel, Trustee, Eugene, OR
- Nima Ghazvini, Office of Martha Bronitsky, Trustee, Oakland, CA
- Halena Greenleaf, Office of Denise Pappalardo, Trustee, Worcester, MA

Introduction: Meet us, how pandemic has affected our office, etc.

Session 2: Case Prep / 341 Virtual Meetings

It Starts with Planting the Seed. Debtors are coping with how to deal with a pandemic and have decided to take the plunge and file for bankruptcy relief. In this session we will discuss the preparation of a new Chapter 13 case with all the extra challenges that the current pandemic has brought forth. Our goal as the Paralegal/Case Administrator is getting an accurate picture of Debtors' finances so the Trustee can conduct a thorough and informative meeting with the Debtors and Creditors. Then we lead into the 341 meetings and how the effects of the pandemic have changed the way we conduct the meeting of creditors.

Session 3: Preparation for Confirmation

Add Food and Water to Make It Bloom. Getting to confirmation is a challenge for Debtors under normal circumstances, but the pandemic has introduced some new hurdles. Business debtors are facing closure of their businesses, and other debtors may be experiencing a reduction in their income. In this session we will review and discuss the requirements for confirmation and how the pandemic has affected feasibility issues and new areas of litigation. We will also discuss new challenges the Trustee's offices are facing, how our offices have dealt with these situations, what we have learned, and how we use this knowledge to thrive.

Session 4: Claims

Protecting the Bloom. Claims are a necessary part of the Chapter 13 process that can either help a case succeed or without proper attention, weeds can grow. In this session, we will discuss all things claims and additional obstacles, such as forbearance agreements, surrendering assets, and relief from stay, that the pandemic has given rise to in administering the case.

Session 5: Modifications

No Need to Be Sour, Modifications Can Be a Life Preserver. Post-Confirmation modifications of Chapter 13 plans have always been common, but since the pandemic they are almost necessary. In this session we will discuss the wave of plan modifications Trustees' offices are now processing, new hurdles facing Debtors, and how the enactment of the CARES Act has provided a temporary life preserver to keep them afloat. We will look at how we are reviewing fluctuations in Debtors' income, extension of plan term, and issues giving rise to litigation.

Session 6: Discharge

Cheers! We Have Lemonade. Debtor sends in their final plan payment and declares "I am done". But are they really? Simply completing the plan and making all of the payments may not result in a discharge. We will discuss new challenges to obtaining a discharge in light of the pandemic, including relief from stay, forbearance agreements, and notices of final cure. We will also discuss issues that may arise after discharge and when it is appropriate to reopen a case.

NACTT 2021 Staff Symposia Series



Staff Attorney (Charlotte Only)

Presenters:

- Marsha Brown, Office of Douglas Neway, Trustee, Jacksonville, FL
- Joseph Ferrise, Office of Keith Rucinski, Trustee, Akron, OH
- Phil Lamos, Office of Lauren Helbling, Trustee, Cleveland, OH

Session 1: Ramifications of the Pandemic, Part 1. Phil Lamos.

A discussion of the CARES Act, forbearance agreements, and related topics.

Session 2: Ramifications of the Pandemic, Part II. Joe Ferrise.

A discussion regarding tracking income, including severance payments and unused vacation time; property of the estate; and related topics.

Session 3: Notices of Final Cure. Marsha Brown.

What are the Trustee's responsibilities? How are different offices approaching the issue? How are Notices under Rule 3002.1 regarding postpetition fees, expenses and charges handled?

Session 4: Ethics & Professionalism: Living in a Virtual World. Joe Ferrise.

The ethics and etiquette associated with virtual or telephonic 341s and court hearings. Privacy concerns.

Session 5: Claims review. Phil Lamos.

Reviewing claims and a discussion regarding what action the Trustee should/does take?

Session 6: Case Law Update. Marsha Brown

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Office Managers/Comptrollers (Long Beach Only)

Presenters:

- Beckie Hadley, Office of Barbara Foley, Trustee, Kalamazoo, MI
- Chuck Hadley, Office of Barbara Foley, Trustee, Kalamazoo, MI
- Vanessa Guerrero, Office of Mary Viegelahn, Trustee, San Antonio, TX

Session 2: Getting Back to Business in the Time of Covid-19

The Covid-19 pandemic blindsided many offices and interrupted business operations. It changed the way business was conducted. For many, business halted. For others, it was a short interruption. In either case, resuming normal business activities presented challenges. It also presented an opportunity to update “disaster” preparedness, response and control plans. This session will address how various offices were affected and how they responded. As with all sessions in this track, you will have a chance to share your office practices; procedures; and experiences in getting back to business in the time of Covid-19.

Session 3: Managing and Motivating Remote Employees

In response to the uncertainties represented by Covid-19, many Trusteeships have employees working remotely as a means to prevent workplace exposure. This session is designed to provide insight on overseeing the shift from employees leaving the office to remote work as an interim solution or as an ongoing change. In this session we will also discuss challenges, and the best practices for, fostering a strong culture in a dispersed workforce.

Session 4: Take the Lead...A Guide to Practicing Wellness

Managers play a central role in maximizing the success of a Trusteeship and in reinforcing a healthy work environment. As senior leaders we set the tone. Managers should lead by example and embody wellbeing. This panel delves into the essential skills needed to lead your team. In addition, we will explore what we can do to take care of our, as well as an employee’s, wellness.

Session 5: Audit Preparation

Are you ready? Dedicating the necessary time for the annual audit is a good investment. Preparation for an audit can begin months before examination. This panel will provide an overview of steps an office can take in preparing for a successful audit beginning with the first day of a fiscal year.

Session 6: Roundtable

This is our last chance, so let us gather and engage in a roundtable discussion of hot topics in the Chapter 13 world. This session also offers an excellent opportunity to answer other burning questions you may have and for extended discussion of topics from the prior sessions.

NACTT 2021 Staff Symposia Series



IT Track (Charlotte Only)

Presenters

- Harold Garcia, System Manager for Melissa Davey, Atlanta, GA
- Debbie Smith, System Manager for Al Russo, Robbinsville, NJ
- Dan Gibbs, Peachtree Law Group, Fayetteville, GA

Session 1: A Pandemic of Lessons Learned. Moderator: Debbie Smith

Description: You survived 2020 by utilizing a variety of tools, both new and old. This session reviews the best tools that enabled your users to do what they needed to do and go from surviving to thriving. From MS Azure to VPN solutions, we explore how we used them all to keep our offices out of intensive care.

Session 2: Coding Your Way to the Top. Moderator: Dan Gibbs

Description: Many techies deny being “coders” and yet we utilize tools, scripts and programming to create efficiencies for everybody in the office. We share our favorite tools from our own code or other sources, while we explore methods to keep on top of the numerous tasks that need to be done every day.

Session 3: Title: Be Kind To Your Future Self, You Earned It. Moderator: Dan Gibbs

Description: Send your future self a note of thanks. Tools here will help you in the future by organizing the results of your work today. From change tracking to planning future evolution, these tools help you and your successor, too.

Session 4: Stepping Carefully Onto The Cloud. Moderator: Debbie Smith

Description: Afraid of falling back to earth through the cloud? Explore the pros and cons of moving your critical services to the cloud with this discussion of MS Azure, Office 365, and much more.

Session 5: Emotional Intelligence & Other Things I Had To Google.

Moderator: Harold Garcia

Description: Google may show more about the solution, but the user knows much more about the challenge. This session explores how to develop the perfect trouble ticket, leading to a prompt and successful resolution of technical issues. Convert “it don’t work” into “you are my hero” with these creative approaches to communication, management and responses to issues.

Session 6: Leveraging STACS features to combat evolving threats.

Moderator: Tom O’Hern

Description: 2020 saw significant changes in the computing methods, technologies and location. This session will highlight current and evolving threats and trends, putting STACS features to work for you, and Frequently Ask Question (FAQ) topics as time permits.