

Sept.-Nov. 2019

6.0 CLE Hours  
(with 2.0 hours Professional Conduct)

CBA

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# The Skilled ADVOCATE SERIES

Co-Sponsor:



## Series Overview:

This intermediate level series is taught by seasoned trial attorneys and sitting judges who will guide attendees through the trial process from intake through pre-trial motions using a real case study. The series capstone (to be held on December 6) will be the Trial Skills Institute—a full day jury trial which incorporates all lessons learned during the 3 part series and results in a jury verdict on the case study. Look for more information about the Trial Skills Institute in the coming weeks, and in the meantime, plan to attend the following 3-course series:

### Intake & Ethics: Undertaking Representation

- September 26, 2019 (2:00-4:00pm)
- 2.0 CLE Hours (with 1.0 Prof. Conduct)

### Discovery: What Do I Need & How Do I Get It?

- October 31, 2019 (2:00-4:00pm)
- 2.0 CLE Hours (with 0.5 Prof. Conduct)

### Dealing With the Court: Best Practices During the Pre-Trial Phase

- November 21, 2019 (2:00-4:00pm)
- 2.0 CLE Hours (with 0.5 Prof. Conduct)

See reverse for complete agenda information.

## Save the Date:



Capstone Event: Trial Skills Institute  
December 6, 2019 • 6.0 CLE hours

## Presenters:

Peter G. Friedmann (The Friedmann Firm LLC)  
Mark S. Granger (Granger Co. LPA)  
Charles J. Kettlewell  
Gregory R. Mitchell (Agee Clymer Mitchell & Portman)  
Elizabeth A. Mote (Kitrick Lewis & Harris Co. LPA)

## Location:

Columbus Bar Association  
175 S. Third St., Suite 1100, Columbus, OH 43215

## Pricing:

This series is CLE Easy Pass eligible

ALL 3 CLASSES: \$200

### Individual Classes:

- Members: \$90 prepaid/\$110 day of
- Non-Members: \$125 prepaid/\$145 day of
- Non-Attorneys: \$70 prepaid/\$80 day of
- Printed Materials: \$20  
(Select this option if you would like to purchase printed materials. Electronic materials will be available at no cost.)

**SPECIAL PRICING: Register for all 3 classes in the series for just \$200!**

## Skilled Advocate Series – Agendas:

**September 26, 2019 (2:00-4:00pm) • 2.0 CLE Hours (with 1.0 Prof. Conduct)**

### **CLASS 1: Intake & Ethics: Undertaking Representation**

**2:00–2:45pm: Intake and Case Analysis (.5 P.C.)**

- Setting Client Expectations
- Client Questionnaire
- Client Conflicts/Waiver Issues (ORPC 1.8 and 1.4)
- Analysis of the Case and Issue Spotting

**2:45–3:00pm: Case Analysis and Signing the Client (.5 P.C.)**

- Fee Contracts (ORPC 1.5)
- Client Fund Management and IOLTA (ORPC 1.15)
- Drafting the Complaint

**3:30–4:00pm: Trial Mindset & Lessons from Trial – View from the Bench**

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**October 31, 2019 (2:00-4:00pm) • 2.0 CLE Hours (with 0.5 Prof. Conduct)**

### **CLASS 2: Discovery: What Do I Need and How Do I Get It?**

**2:00–3:30pm: Discovery**

- Scope of Discovery: The Discovery Plan
- Applicable Rules of Civil Procedure
- Depositions
- Drafting Requests for Admission, Interrogatories and Requests for Production
- Professionalism and Dealing with the Difficult Litigator or Client
- Special Technology Core Competence Rules (ORPC 1.1)
- E-Discovery: ESI, Inadvertent Disclosure, Clawback Agreements, Judicial Holds, Spoliation (ORPC 1.1)
- The Use of Focus Groups

**3:30–4:00pm: Discovery Disputes & Being Prepared – View from the Bench**

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**November 21, 2019 (2:00-4:00pm) • 2.0 CLE Hours (with 0.5 Prof. Conduct)**

### **CLASS 3: Dealing With the Court: Best Practices During the Pre-Trial Phase**

**2:00–3:00pm: Pre-Trial Issues and Motions Practice**

- Local Rules/Courtroom Rules
- Drafting an Effective Pre-Trial Statement
- Dispositive Motions Practice
- Defining your Evidence
- Drafting Witness and Exhibit Lists
- Case Management
- Settlement Conferences
- Mediation/Alternative Dispute Resolution

**3:00–4:00pm: Trial Preparation and Courtroom Decorum (.5 Professional Conduct)**

- Motions in Limine & Pre-Trial Motions
- Voir Dire Considerations and Questions
- Expert Witnesses
- Jury Instructions
- Courtroom Decorum: Trial Dos and Don'ts: Keeping it Professional