

NACTT

NATIONAL ASSOCIATION OF CHAPTER 13 TRUSTEES

NACTT 2022 SUPER 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: 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.
General Session 9:00 a.m. to 10:30 a.m.
Lunch (Boxed Lunches Provided Grab & Go to allow time in the city): 12:15 pm to 1:30 p.m.
Breaks: 15 minutes each between Sessions 1 and 2 and Sessions 3 and 4.

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

General Session

(New Orleans Only) Staff Attorney:
Case Law Update

(New Orleans Only) IT Track: **Practical Security
– One More Step From Here...**

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

Bankruptcy A-Z: **Attendees Assemble**

(New Orleans Only) Staff Attorney:
Legislative update (COVID issues)

Leadership: **Reconnecting To A
Disconnected Workplace**

(Charlotte Only) Office Managers/Comptrollers:
OM/C League – Let's Talk Roundtable

Paralegals/Case Administrators:
Preparation for the §341 meeting

(New Orleans Only) IT Track: **The Swedish
Death Approach to PII Exposure**



NACTT 2022 Staff Symposia Series - Registration (continued)

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

- Bankruptcy A-Z: **Knowledge Can Be Your Superpower!**
- Leadership: **13 Rules To Live By**
- Paralegals/Case Administrators: **Confirmation**

- (New Orleans Only) Staff Attorney: **Beginning the Case/Ethics**
- (Charlotte Only) Office Managers/Comptrollers: **Communication Superheroes**
- (New Orleans Only) IT Track: **Operating Systems Whack-a-Mole**

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

- Bankruptcy A-Z: **COVID Kryptonite**
- Leadership: **Building Blocks For Success**
- Paralegals/Case Administrators: **Modifications**

- (New Orleans Only) Staff Attorney: **11 USC §§1322 & 1325**
- (Charlotte Only) Office Managers/Comptrollers: **Post-Pandemic Workplace Policies**
- (New Orleans Only) IT Track: **What's Your Line? Working Without an Office.**

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):

- Bankruptcy A-Z: **To Infinity, and Beyond**
- Leadership: **Nine Leadership Tips We Have Observed Over Seven Decades On This Planet**
- Paralegals/Case Administrators: **Claims**

- (New Orleans Only) Staff Attorney: **Hot Topics**
- (Charlotte Only) Office Managers/Comptrollers: **Wait, What? They're Gone! – Key Employee Departures**
- (New Orleans Only) IT Track: **Law and Ethics in the Trusteeship**

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

- Bankruptcy A-Z: **Bankruptcy Multiverse**
- Leadership: **Ask The Superheroes: Q&A**
- Paralegals/Case Administrators: **Discharge**

- (New Orleans Only) Staff Attorney: **Hot Topics**
- (Charlotte) Office Managers/Comptrollers: **OM/C League – Let's Talk Roundtable Sequel**
- (New Orleans Only) IT Track: **Preparing for Eternal Change**

Adjournment: 11:45 a.m.



NACTT 2022 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"/> Charlotte, North Carolina
March 10 and 11, 2022
Classes: Thursday and Friday
Reception: Wednesday, March 9, 2022
Registration Deadline: February 15, 2022 | Charlotte Marriott City Center
100 W Trade Street
Charlotte, NC 28202
(704) 333-9000
Room Rate: \$206 per night
Reservations Deadline: February 15, 2022 |
| <input type="checkbox"/> New Orleans, Louisiana
April 14 and 15, 2022
Classes: Thursday and Friday
Reception: Wednesday, April 13, 2022
Registration Deadline: March 13, 2022 | JW Marriott New Orleans
614 Canal Street
New Orleans, LA 70130
(504) 525-6500
Room Rate: \$195 per night
Reservations Deadline: March 13, 2022 |

Airline Discount Code

American **TBD** Delta **TBD** 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'21 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: info@nactt.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 guests traveling with attendees, this includes the Reception.

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

NACTT 2022 SUPER Staff Symposia Series



Bankruptcy A-Z

Presenters:

- Holly Jamjoo, Office of Mary Viegelahn, Trustee, San Antonio, TX
- Charri Stewart, Office of Suzanne Wade, Trustee, in Richmond, VA
- Carrie Vasquez, Office of Mary Viegelahn, Trustee, in San Antonio, TX

SESSION 2: ATTENDEES ASSEMBLE! *Teamwork makes the dream work and like any team of superheroes, we as a Trusteeship are strongest when we work together. After so much time apart, how to recapture a team spirit, stay positive and serve with empathy in this post-COVID world.*

SESSION 3: KNOWLEDGE CAN BE YOUR SUPERPOWER! *Riddle me this, riddle me that, how many audits and where are they at? Some are official, others are not, we will discuss them all, that's a fact! Multiple audits are performed throughout the life of a bankruptcy case, each with its own importance to the Trusteeship. Come share and improve your knowledge of audits and why they are essential.*

SESSION 4: COVID KRYPTONITE *Like throwing Superman off his game, COVID was a shock to the system. We were all forced to make changes; some of them good, others a challenge. Two years later we continue to adapt as these long-term side effects have become our new normal. How has your office kept the COVID Kryptonite at bay? Together we can find the cure!*

SESSION 5: TO INFINITY, AND BEYOND! *The COVID journey is finally nearing its end. The end of the CARES Act is upon us and with it, the return to a normal Bankruptcy World. Or is it? What will bankruptcy look like in 2022 and beyond?*

SESSION 6: BANKRUPTCY MULTIVERSE *Each Trusteeship is like a planet; orbiting its own universe of local rules and procedures. With an infinite number of ways to operate, there are an infinite number of possibilities. You may find something valuable from another universe to take back to your home planet. Is your disbursement process faster than a speeding bullet? Can your office communication leap tall buildings in a single bound? Let's explore the multiverse and discover what we can offer each other.*

NACTT 2022 SUPER 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: Reconnecting To A Disconnected Workplace

Can work just go back to the way it was before COVID? In a word, “No”. Let’s face it, COVID changed everything. In this session, we will discuss how leaders can work to create a workplace where people communicate and collaborate effectively and are engaged and motivated.

SESSION 3: 13 Rules To Live By

General Colin Powell, retired Army officer and former Secretary of State, died on October 18th, 2021 due to complications from COVID-19. In this session, we will examine his famously detailed 13 rules to live by from his best-selling book entitled, “It Worked for Me, In Life and Leadership.”

SESSION 4: Building Blocks For Success

Like constructing a building, a career needs a foundation, framing, insulation, windows to the world, doors to come and go, and a roof to keep the rain out. In this session we will discuss what it takes to be a top performer and how to lead others to be top performers.

SESSION 5: Nine Leadership Tips We Have Observed Over Seven Decades On This Planet

Dave and Merideth have reached the milestone of three score and ten years. Brenda is catching up quickly. In this session we will reflect on leadership tips gained from years of experience in our roles as leaders... some very serious, and some quite humorous. We want to hear about your tips also!

SESSION 6: Ask The Superheroes: Q&A

This is traditionally the participants favorite session. In this session we will address the participants questions that were submitted throughout the Symposium as well as questions that are addressed from the floor. This is usually exciting, entertaining, and informative.

NACTT 2022 SUPER Staff Symposia Series



Paralegal & Case Administrator Track

Presenters:

- Jennifer Bellman, Office of Naliko Markel, Trustee, Eugene, OR
- Halena Greenleaf, Office of Denise Pappalardo, Trustee, Worcester, MA
- Anthony Olivadoti, Office of Marilyn Marshall, Trustee, Chicago, IL

SESSION 2: Preparation for the §341 meeting

“Nothing goes over my head. My reflexes are too fast. I would catch it.” Drax in *Guardians of the Galaxy*
Reviewing filed documents like the Schedules and SOFA, ensuring the means test has been properly applied and disposable income has been properly calculated, evaluating whether the best interest of creditors test is met, and getting ready to conduct a thorough meeting to gather the financial information the Trustee must have to object (or not) to confirmation. How does your Trusteeship handle §341 prep? Are there procedures and tips we can learn from each other?

SESSION 3: Confirmation

“Are you sure you wouldn’t rather just punch your way out?” Loki to Thor in *Thor: The Dark World*
Sometimes it feels like a fight. What does the Bankruptcy Code require to confirm a case? What reviews does your office do prior to confirmation? How are your objections prepared and, hopefully, resolved? Who looks at amended plans and those amended schedules that are filed at the last minute? What other factors must you consider? Are there some tricky issues? What about feasibility? How are confirmation resolutions presented to your court? Let’s talk about it!

SESSION 4: Modifications

“Everything will never be okay.” Tony Stark to Pepper Potts in *Iron Man 3*.
Life happens. Cars break down; tires wear out; air conditioners and heating systems die; hot water heaters go kaput; people get sick, change jobs, move, and divorce. Three to five years is a long time to go without problems and changes. Sometimes the original Plan just won’t work. What are the Bankruptcy Code provisions regarding modifications? Why might the debtor need to modify a plan? Why might your office need to object? Can the debtor buy a new car and then seek to reduce the percentage paid to the unsecured creditors? And what about Trustee modifications to capture increased income or other sources of repayment?

SESSION 5: Claims

“Asleep for the danger, awake for the money, as per fricking usual.” Rocket in *Guardians of the Galaxy*.
It’s not about the money, money, money . . . Oh wait, maybe it is. How do you conduct your claims review and when? When do you object? What are the Bankruptcy Code provisions governing the bases for filing a claim objection? What role does your office have when the debtor objects to a creditor claim? What about stale dates? Never a dull moment in the bankruptcy world!

SESSION 6: Discharge

“I’m with you ‘til the end of the line.” Steve Rogers in *Captain America: The Winter Soldier*.
The moment we’ve all been waiting for. After three to five years of hard work (and it is hard), the debtor files a motion for the entry of a discharge. What is a discharge? What steps does your office take when the case is close to completion to ensure that the debtor is entitled to a discharge? What are the types of discharge and the exceptions to discharge? What about revocation of the discharge? And you thought it was over . . .

NACTT 2022 SUPER Staff Symposia Series



Staff Attorney (New Orleans Only)

Presenters:

- Sarah Atwood, Office of Kathleen Leavitt, Trustee, Las Vegas, NV
- Marsha Brown, Office of Douglas Neway, Trustee, Jacksonville, FL
- Joseph Ferrise, Office of Keith Rucinski, Trustee, Akron, OH

SESSION 1: Case law update Sarah

SESSION 2: Legislative update (COVID issues) Joe

SESSION 3: Beginning the Case/Ethics Marsha

SESSION 4: 11 USC §§1322 & 1325 Sarah

SESSION 5: Hot Topics Marsha
Dealing with Courts outside of our normal bankruptcy realm, including appeals
Constructive Trustee Fee

SESSION 6: Hot Topics Joe
Bankruptcy & Divorce, including appointments of special counsels
Vesting of property in bankruptcy

NACTT 2022 SUPER Staff Symposia Series



Office Managers/Comptrollers (Charlotte 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: OM/C LEAGUE - LET'S TALK ROUNDTABLE

Superheroes don't just come together in comics, television shows and movies to battle the problems they face. "A hero can be anyone." Let's team up and open the track with discussions on how we're addressing challenges we continue to face from the lingering effects of the Covid-19 crisis. Hot topics to collaborate on include, but are not limited to, use of personal time off; motivating employees to be prepared when case load increases; etc.

SESSION 3: COMMUNICATION SUPERHEROES

The events of the past two years have taken a toll on an employee's productivity and mental health. Many of us are dealing with quality of work issues; lack of teamwork; and employee worries over job security and risk of exposure to viruses. These are compelling reasons to engage and strengthen connections with employees to rebuild organizational health and productivity. Effective communication is everyone's business. Are you a communication superhero? Join us as we discuss various channels of communication to positively impact employees while addressing performance issues, employee anxiety, and promoting teamwork. As managers in the office we play a greater role. "Remember with great power, comes great responsibility."

SESSION 4: POST-PANDEMIC WORKPLACE POLICIES

"A hero is an ordinary individual who finds strength to persevere and endure in spite of the overwhelming obstacles." The effects of a probable once in a generation virus that wreaked havoc around the world has changed the way we view the workplace and how an office operates. It has forced us to examine current policies and develop new ones to overcome obstacles presented by the health crisis. There is no one size fits all approach, but establishing new and updating old policies goes a long way in continuity of business. So, let's dust off our capes and discuss strategies that mitigate the effects of and respond to our new post-pandemic reality. As with all sessions in this track, you will have a chance to share your office practices, procedures, and experiences.

SESSION 5: WAIT, WHAT? THEY'RE GONE! – KEY EMPLOYEE DEPARTURES

It can be a difficult time when a key employee departs. Especially when it comes as a surprise. When they leave their experience, skills and knowledge leaves with them. It can be a time of stress and high emotions. Though we may feel a sense of shock and panic it doesn't have to be chaos. How do you manage when a key employee retires, is laid off, resigns, or is no longer part of the team as a result of an unexpected event? Better to know sooner rather than later because "knowing is half the battle." This session delves into effective solutions for when a key employee departs.

SESSION 6: OM/C LEAGUE - LET'S TALK ROUNDTABLE, THE SEQUEL

Time to take what made Session 2 great even better. Let's reassemble and continue our talks on overcoming challenges in the office and in the Chapter 13 world. This is our last opportunity to share more of your (and our) experiences, successes, and failures. "The real crime would be not to finish what we started."

NACTT 2022 SUPER Staff Symposia Series



IT Track (New Orleans Only)

Presenters

- Sam Garber, QC Networks, Las Vegas, NV
- Dan Gibbs, Peachtree Law Group, Fayetteville, GA
- Tom O'Hern, STACS Program Manager for ICF, Baltimore, MD
- Debbie Smith, System Manager for Al Russo, Trustee, Robbinsville, NJ

With the ability to take the entire office down in a single click, every trustee staff member has the power to choose the dark side or the use special powers to save our world. Marvel in the power of both the dark and the light as we join in the pursuit of IT Avengers as they build a team for good versus evil where the virtual world meets reality every day.

Session 1: Practical Security - One More Step From Here...

Focusing on real world practical solutions, explore the power of small steps in this discussion as we cover several practical steps toward a more secure environment. Multi-Factor Authentication implementation, regular firmware updates and staff training plans will be explored.

Session 2: The Swedish Death Approach to PII Exposure

You thought you had to have it, but really you can do with less. Apply the powers of the gods of Swedish Death Cleaning to your PII as you plan for when it gets passed along from your known universe to the unknown. Explore risk reduction methods with us to keep the grim reaper of PII from knocking on your office door with unpurged emails, un-redacted documents, and undetected data.

Session 3: Operating Systems Whack-a-Mole

Borrow the Hammer of Thor to explore our preferred choices when it comes to our workstation's OS? Which will you smash and which is best for you! Come and take a whack at Windows 11, the newest version of Microsoft's PC software, along with Linux and Chrome OS.

Session 4: What's Your Line? Working Without an Office.

So... "Where do you work?" is no longer a pickup line. The new trustee's office is everywhere! Like it or not, the power of invisibility is contagious and spreading out of control. You will forever see less of your co-workers in person as they work in what might as well be a galaxy far, far, away. Explore that new world of hosting in the cloud to productivity monitoring tools to remote workplace security as we go where your employees are now. Help us plan for working with happy and not so happy landing parties, what they do with your equipment, connectivity, data and processes when they go where few staff have gone before. Yes, it is a hybrid metaphor for a new hybrid world that we want you to explore it with us.

Session 5: Law and Ethics in the Trusteeship

Identify the elements of Kryptonite that could bring down the most powerful among us as we explore law and ethics in the trusteeship. Explore policy, legal and ethical issues regarding activities of the system manager and the staff they work to support. After the big disclaimer that no law is practiced in this seminar, we will explore the questions... Should you really sign that agreement? Can I certify that and should I? Can my employer require this? Did I just give complete control to my trustee? Can I delete the SSNs from the audit history logs under the UST Handbook? Why you shouldn't open the firewall so the Trustee can get there?! And, did I just violate the Computer Fraud & Abuse Act under *Van Buren v. United States*?

Session 6: Preparing for Eternal Change

Across the ages new IT trends destroyed traditional computing practices and technologies causing IT super heroes to adapt their roles, expand their knowledge, and develop new super skillsets. It's not all bad for our heroes and can actually be good for the business, administrator, and users. We will discuss key trends and benefits to help secure the galaxy of distributed users and on-premise, cloud and hybrid computing environments and the resources IT administrators can use to start preparing for these inevitable changes. Key trends include centralized identity and access management with Multifactor Authentication, migration of business services to the cloud, and cloud hosted servers.