

NACTT

NATIONAL ASSOCIATION OF CHAPTER 13 TRUSTEES

NACTT 2024 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: 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: **Keynote Speaker: Josh Steinhouse – The Multigenerational Workforce**
- (San Francisco Only) Staff Attorney: **Artificial Intelligence and Chapter 13.....Should you Dare?**
- (San Francisco Only) IT Track: **Disaster Recovery**

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

- Bankruptcy A-Z: **The Innovative Office**
- Leadership: **True Colors Personality Styles – What's Your Color?**
- Paralegals/Case Administrators: **Pre-confirmation**
- (Virginia Beach Only) Office Managers/Comptrollers: **Office Safety**
- (Virginia Beach Only) New Trustee: **Learn the Origins – Why We Do What We Do**
- (San Francisco Only) Staff Attorney: **Case Law Update.....The Courts Have Delivered!**
- (San Francisco Only) IT Track: **Cloud Transitions**



NACTT 2024 Staff Symposia Series - Registration (continued)

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

- Bankruptcy A-Z: **Be The Extra**
- Leadership: **Harnessing Conflict**
- Paralegals/Case Administrators: **Claims**
- (Virginia Beach Only) Office Managers/Comptrollers: **Employment Law Refresher and Update**
- (Virginia Beach Only) New Trustee: **How to Manage & Monitor Office Work Flow**
- (San Francisco Only) Staff Attorney: **Litigation, Evidence, and Mediation, Oh My!**
- (San Francisco Only) IT Track: **Securing the Perimeter**

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

- Bankruptcy A-Z: **The Annual Audit**
- Leadership: **Well Being and Mental Health in the Workplace**
- Paralegals/Case Administrators: **Mortgages**
- (Virginia Beach Only) Office Managers/Comptrollers: **The Value of Sound Office and Business Ethics**
- (Virginia Beach Only) New Trustee: **Employee Issues & Evaluations**
- (San Francisco Only) Staff Attorney: **Meetings of Creditors Via Zoom...How It Started and How It's Going**
- (San Francisco Only) IT Track: **Tools, Tips & Tricks used to enable a trustee to Dare**

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: **Effective Time Management**
- Leadership: **The Power of Mentorship**
- Paralegals/Case Administrators: **Post-confirmation**
- (Virginia Beach Only) Office Managers/Comptrollers: **The Nowhere Office of the Future: Reinventing Work and the Workplace of the Future**
- (Virginia Beach Only) New Trustee: **If You Think It Can't Happen to You – Think Again**
- (San Francisco Only) Staff Attorney: **Death, Taxes, and Student Loans?**
- (San Francisco Only) IT Track: **National Data Center**

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

- Bankruptcy A-Z: **The A-Z Roundtable – Where Everyone Has a Seat**
- Leadership: **Roundtable**
- Paralegals/Case Administrators: **Roundtable Discussion**
- (Virginia Beach Only) Office Managers/Comptrollers: **The Future Efficient Office**
- (Virginia Beach Only) New Trustee: **UST Evaluations & Audits**
- (San Francisco Only) Staff Attorney: **To Confirmation and Beyond**
- (San Francisco Only) IT Track: **STACS**

Adjournment: 11:45 a.m.



NACTT 2024 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.

- Virginia Beach, Virginia**
March 21 and 22, 2024
Classes: Thursday and Friday
Reception: Wednesday, March 20, 2024
Registration Deadline: February 19, 2024
- Cavalier - Marriott Virginia Beach Oceanfront**
 4201 Atlantic Avenue
 Virginia Beach, VA 23451
 (757) 425-8555
 Room Rate: \$151 per night
Reservations Deadline: February 19, 2024

- San Francisco, California**
April 25 and 26, 2024
Classes: Thursday and Friday
Reception: Wednesday, April 24, 2024
Registration Deadline: April 9, 2024
- San Francisco Marriott Marquis**
 780 Mission Street
 San Francisco, CA 94103
 (415) 896-1600
 Room Rate: \$229 per night
Reservations Deadline: April 9, 2024

Airline Discount Code

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

Registration Fees

- \$500 (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'23 funds:

- \$550 (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 February 1st.
NO REFUNDS after February 1st

NACTT 2024 Staff Symposia Series



Bankruptcy A-Z

Presenters:

- Beckie Hadley, Office of Barbara Foley, Trustee, Kalamazoo, MI
- Heidi Latzan, Office of Dynele Schinker-Kuharich, Trustee, Canton, OH
- Melanie Childress, Office of Christopher Micale, Trustee, Roanoke, VA

Session 2

The Innovative Office:

Change is inevitable. What has changed, and are plans in effect to keep up with the times? Dare to dream to deliver exceptional work in an environment of change.

Session 3

Be The Extra:

How do you dare, dream, and deliver for your Trusteeship? This session will cover professionalism, community relations, and becoming invaluable to your office.

Session 4

The Annual Audit:

Daring 2 dream = delivery. The annual audit is not just about money. Everyone plays a role in audit success. This session explores why we do what we do, and how you are essential to a successful outcome.

Session 5

Effective Time Management:

Deliver better results by dreaming of achievement. We dare you to become more efficient. Everyone is valuable, so let's use this session to become even better by perfecting time management skills in daily activities.

Session 6

The A-Z Roundtable – Where Everyone Has a Seat:

Dare to share so we can deliver ideas! Let's work together to make our dreams reality. This session recaps what we have learned, and gives you the opportunity to open new topics for discussion.

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Leadership

Presenters:

- Jesse Furst, Office of Krista Preuss, Trustee, Jericho, NY
- Vanessa Guerrero, Office of Mary Viegelahn, Trustee, San Antonio, TX
- Charri Stewart, Office of Suzanne Wade, Trustee, Richmond, VA

SESSION 2: TRUE COLORS PERSONALITY STYLES – WHAT’S YOUR COLOR?

Colors can tell you a lot about yourself, how you work, and how others see you. Dare to discover more about yourself and the different color preferences that may influence your personality? Whether you are interested in personal growth, improving your work environment, or just having fun, exploring the world of color psychology can be a rewarding journey. In this lively session, we will go on a color adventure together! Let us discover more about ourselves and how color psychology can help enhance our daily lives, such as a more productive work environment.

SESSION 3: HARNESSING CONFLICT

Dream of a conflict-free work environment? Dare to disagree? Workplace conflict can be frustrating and exhausting; and if avoided or handled improperly it can damage workplace relationships. Disagreements do not have to be counterproductive. Embrace conflict and harness its power for change. Every leader, or aspiring leader, should have effective conflict management skills to defuse a situation or manage a dispute productively. In this session we will discuss how to lead and navigate challenging conversations with peers and supervisors. The focus will be on the skills needed to assess and diagnose issues; understand different personal styles; and implement a problem solving approach that will strengthen relationships and results. Join us and learn how to develop a productive conflict that will Deliver your team and office to a new level of success.

SESSION 4: WELL BEING AND MENTAL HEALTH IN THE WORKPLACE

We all Dream of having the best job, but in doing so we need to Dare to explore the opportunities for change. Albert Einstein said, “insanity is doing the same thing over and over and expecting different results.” Let’s open the floor and discuss things that impact our well-being at work and discover ways to alleviate stress and mental anguish. This session will focus on employee well-being and fostering a mental health-friendly workplace so we can Deliver the best version of ourselves. Join us as we navigate what it means to adopt balance in the workplace centered around mental, emotional, and social health to lead to a more resilient workforce and improved well-being.

SESSION 5: THE POWER OF MENTORSHIP

The focus of this session will be development, mentorship, and training. Or, as we like to call it, “Develorshipping.” We will explore how Daring to share knowledge and experience helps Deliver a Dream work environment. We will also examine the potential pitfalls and big benefits of both teaching and learning. Come be part of this fun and exciting session; and learn how leaders can produce personal and professional growth not only in themselves, but also in others.

SESSION 6: ROUNDTABLE

Let’s end the track with a roundtable discussion of other hot topics in leadership and/or expand on discussions from the prior sessions. This is our last opportunity to collaborate. Like all others, this will be an interactive session where many takeaways can be gained.

NACTT 2024 Staff Symposia Series



Paralegal & Case Administrator Track

Presenters:

- Jenfer Bellman, Office of Naliko Markel, Trustee, Eugene, OR
- Halena Greenleaf, Office of David A. Mawhinney, Trustee, Worcester, MA
- Stacey A. O'Stafy, Office of Faye D. English, Trustee, Columbus, OH

Session 2: Pre-confirmation – *One does not **dream** of filing bankruptcy, but it happens. Let's talk about the beginning, how does a case flow through the office – who **dares** to work on the case file. Let's look at the office post-pandemic – is there a new Trustee or are you taking on new tasks? We will discuss reviewing the assets of the estate and section 341 meetings. Pre-confirmation can bring up many issues and we will address preferences, fraudulent transfers and tolling agreements. By extensively reviewing the case prior to confirmation we give the Trustee all that is needed to do a thorough section 341 examination of the debtor, thus ensuring we can **deliver** confirmation of the plan.*

Session 3: Claims – *Just when you think all of the hurdles have been cleared, something unexpected happens that jeopardizes confirmation of your plan; or maybe you have discharge in sight and a post-confirmation amended claim threatens your **dreams** of obtaining a discharge. In this session, we'll **dare** to look at feasibility, treatment of secured claims (whether the claim is filed or not), post-petition claims filed under §1305, and deficiency claims filed following auto accidents and/or surrender of the vehicle. We'll also look at student loan issues and other types of unanticipated situations involving claims to ensure the delivery of a discharge order.*

Session 4: Mortgages – *Are conduit mortgage jurisdictions a **dream** or a nightmare? In this session, we'll look at the circumstances under which a mortgage is required to be paid conduit and consider the challenges faced when the debtor doesn't **deliver** on the promise to make plan payments or the creditor doesn't timely file notices of mortgage payment change. We'll consider various issues where the note either matured pre-petition or will mature during the plan and look at loan modifications and motions for relief from stay in direct pay cases. We'll **dare** to discuss the notice of final cure/motion to deem/determine process, including whether mid-case audits are helpful.*

Session 5: Post-confirmation – ***Dare** we say it - the plan was confirmed and it is smooth sailing. Then we wake from a **dream!** Let's discuss some of the issues we face post-confirmation. How do we find out if the debtor has increased income? Can the trustee modify to capture past income or income going forward? What about the sale of real estate and modifications of the plan? Here we will get into an engaging discussion of how our offices address these post-confirmation issues and **deliver** a variety of options to handle them.*

Session 6: Roundtable Discussion – *Have you ever had a recurring **dream**? **Dare** we ask if you want to share it with us? **Delivering** to you, live and in-person, the Trustee Office Staff Chat. We are the hosts but you are the stars! Is there something you want to talk more about or something we did not bring up, do you have an idea, comments, suggestions of what works for you. Let's share with each other, maybe there will be something you heard that you want to take back to your trustee office. Now is the time, lets Staff Chat!*

NACTT 2024 Staff Symposia Series



Staff Attorney (San Francisco Only)

Presenters:

- Brandi Kirkland, Office of K. Edward Safir, Trustee, Atlanta, GA
- Joseph Ferrise, Office of Keith Rucinski, Trustee, Akron, OH
- Anthony Olivadoti, Office of Marilyn Marshall, Trustee, Chicago, IL

Session 1: Artificial Intelligence and Chapter 13...Should You Dare? Is AI too good to be true or does it have the potential to deliver? We will discuss AI options, their applicability and usefulness as well as their limitations and the risks/rewards of using them. Join us to see if AI is a dream or a nightmare.

Session 2: Case Law Update...the Courts Have Delivered! Exactly what they have delivered is up for discussion. Who benefits from post-petition appreciation? Is your Trustee entitled to retain pre-confirmation fees? Is a change in circumstance required to modify a plan post-confirmation? This panel dares to discuss it all!

Session 3: Litigation, Evidence, and Mediation, Oh My! This panel delivers on all three! Valuation...is that document admissible? If so, how do you get it admitted? Do you need a witness? Do you need an "expert" witness? How do you qualify them as an expert? Judicial Notice...when and what you can ask for. Mediation...is that even a viable option for our purposes?

Session 4: Meetings of Creditors Via Zoom...How It Started and How It's Going. Now that all of us have had at least a few months of Zoom 341s under our belts, what are some of the "best practices" that have developed? How are you handling technological issues, identity verification issues, poor or deficient attorney representation issues, etc.? This panel will deliver the good, the bad, and the ugly (literally).

Session 5: Death, Taxes, and Student Loans? We will review the Department of Justice and the Department of Education's new guidance for the government to use when handling student loan discharge requests in bankruptcy. Should debtors dare to dream? Does a Chapter 13 Trustee have a role in this? If so, how, when, where? This panel will deliver those answers.

Session 6: To Confirmation and Beyond... What if a proposed plan dares to deliver unusual or unique provisions? We will talk about those "other" lines on a debtor's budget, means test, and plan. Does a debtor have a duty to disclose a post-petition asset such as an inheritance or personal injury claim? What about cases that convert from Chapter 7? This panel will address the weird, the wacky, and the wild.

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Office Managers/Comptrollers (Virginia Beach Only)

Presenters:

- Merideth Akers, Office of Bradford Caraway, Trustee, Birmingham, AL
- Brenda Dickerson, Office of Sylvia Brown, Trustee, Memphis, TN
- Stacey Otwell, Office of Mark McCarty, Trustee, North Little Rock, AR

Session 2: Office Safety: Yes, OSHA has office environment safety standards. Topics include CPR training, various life-saving equipment training, and remote employee policies and safety concerns. Also plan for a discussion on preventing and responding to an active shooter situation. Share what precautions your office prescribes.

Session 3: Employment Law Refresher and Update: Reminder and update on basic employment law topics, legal pitfalls, horror stories, and preventative measures. This overview is designed to be an overview and a group discussion.

Session 4: The Value of Sound Office and Business Ethics: In Person and Remote. How to develop sound ethics policies, how to avoid ethical lapses, looking-out for ethical dilemmas, and communicating ethical values.

Session 5: The Nowhere Office of the Future: Reinventing Work and the Workplace of the Future. Topics include remote working and the remote employee's social, emotional, and mental health. Other topics to be discussed are motivating remote productivity, measuring remote productivity, flexible work hours, and working remote's effect on leave taken.

Session 6: The Future Efficient Office: Topics will include; Electronic Funds Transfers, the use of Trusteeship credit card for purchases and office expenses, encouraging debtors' use of National Data Center, the use of Artificial Intelligence, and the related cost savings.

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IT Track (San Francisco Only)

Presenters

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

Session 1: Disaster Recovery – Join us in exploring the Dream of ensuring a smooth recovery from the nightmare of new challenges and solutions in Disaster Planning. From the basics to creative solutions just off the idea factory floor, lets revisit age old solutions through a new lens.

Session 2: Cloud Transitions – Dare to soar with us through the Cloud with transitions of hosting, storage, access and licensing alternatives while delivering a better solution for your team with less PII exposure through data purging, optimized performance and reduced maintenance through server consolidation, and more efficient cost effective licensing. Learn about all the details and considerations for preparing for a cloud transition, details surrounding the tasks involved, and what can be expected when the migration takes place.

Session 3: Securing the Perimeter – Walk the wall with us and deliver better security through modern next-gen firewall solutions that come in all shapes and sizes. If you can handle the truth, we will discuss site to site setup, Firewall-as-a-Service, Content Filtering, logging & connectivity ideas, VPN types, tunnels, authentication methods.

Session 4: Tools, Tips & Tricks used to enable a trustee to Dare to believe a one man IT Shop can Dream to do a great job and actually Deliver successful results. Methods discussed here will include teaming up with your internal users through education dedicated to securing their WFH environment, how to provide better methods of accessing information through internal website knowledge base hosting, and how to identify and build vendors into more productive partnerships to accomplish your goals.

Session 5: NDC - National Data Center – We, the NDC, are challenging ourselves in 2024 to Dream, Dare, and Deliver new tools for Trustee offices that have a national scale. We want to Dream of innovative solutions to streamline our Zoom meeting world. We will create daring new Debtor experiences to deliver our promise to give Debtors the best tools and communication aids to stay engaged with their case. Join in with the NDC team and our IT Track Panel as we explore new NDC offerings.

Session 6: STACS - Bring your security issues to this discussion of the most recent trends in computer security. Join us as our resident security experts bring you up to speed addressing the hot topics of the day during this presentation that skips the Dream of perfect computer security, Dares you to rise up to ever-evolving security challenges that await you in 2024, so you can Deliver a practical defense plan to your team.

NACTT 2024 Staff Symposia Series



New Trustee Training (Virginia Beach Only)

- Session #1 GENERAL PLENARY SESSION**
Keynote Speaker: Josh Steinhouse – The Multigenerational Workforce
- Session #2 LEARN THE ORIGINS – WHY WE DO WHAT WE DO**
- Session #3 HOW TO MANAGE & MONITOR OFFICE WORK FLOW**
- Session #4 EMPLOYEE ISSUES & EVALUATIONS**
- Session #5 IF YOU THINK IT CAN'T HAPPEN TO YOU – THINK AGAIN**
- Session #6 UST EVALUATIONS & AUDITS**