



THE OSGOODE CERTIFICATE IN FAMILY LAW SKILLS AND PRACTICE

PROGRAM DIRECTORS

Julie K. Hannaford
J K Hannaford Barristers

Shelley Kierstead
Assistant Professor,
Osgoode Hall Law School

REGISTRATION DETAILS

9 modules:

March 1, 8*, 22*, 29, April 5*, 12*,
19, 26* and May 10, 2023

Online (Live)

*Registration includes 120-day
unlimited, online access to the
recorded program.*

**Skills workshops must be completed
live and will not be recorded.*

*“This program is the foundation
that every lawyer who wants to
practise family law needs, and it
is the type of training that most
senior family law lawyers wish
they could deliver, but often can’t
in light of their busy schedules.”*

Julie K. Hannaford
J K Hannaford Barristers

Take your skills to a new level and ***learn-by-doing*** by
working with simulated clients and real-life case files.

In 9 intensive modules (over 3 months), our expert faculty will guide
you through:

- Initial client contact and **mastering the client intake interview**
- How to managing challenging clients; working with difficult opposing counsel
and judges; and strategies for working with self-reps
- The biggest (and most costly) mistakes lawyers make preparing financial
statements (and how to avoid them)
- **Effective negotiation strategies** and consensual resolution
- Options for when the matter doesn’t settle
- **Motions Advocacy:** drafting impactful affidavits and hone your oral advocacy
skills in a simulated motion
- Best practices for Minutes of Settlement, Minutes of Understanding and
Separation Agreements
- Tactics and techniques when wrapping up the file

Make a valuable and lasting investment in your Family Law career while
fulfilling your LSO CPD requirements.

Register today at:

osgoodepd.ca/family-law-skills



The Osgoode Certificate in Family Law Skills and Practice

PRACTICAL HANDS-ON LEARNING.

During the program, you will engage in learn-by-doing workshops. You will work with trained Simulated Clients and get individualized feedback about both your advocacy skills and your ability to communicate and interact with clients.

WHAT IS A SIMULATED CLIENT?

Trained by Osgoode Hall Law School, our Simulated Clients are a select group of professionals who have received in-depth training in typical client behaviours. They are also trained on how to assess and provide feedback about your performance.

Register today at:

[osgoodepd.ca/
family-law-skills](https://osgoodepd.ca/family-law-skills)

The nature of family law makes it one of the most demanding areas of practice. To be effective and successful, you need client management, practice management and legal skills, as well as knowing the law. While many continuing education programs focus on what you need to know, there are few offerings that focus on what you must be able to do. Similarly, many focus on court room proceedings, when in fact, very few matters go to trial.

Developed by senior family law judges, and experienced counsel, **The Osgoode Certificate in Family Law Skills and Practice** is a one-of-a-kind program that focuses on developing and improving a family law practitioner's most frequently used skills.

Over 9 intensive modules (spread out over 3 months), you will **work with a real-life case file, taking it from start to finish.**

Designed for an enhanced online learning experience, engage in interactive online workshops and discussions. This is also an opportunity to refine your online client communication and advocacy skills. You will acquire a grounding in the foundational knowledge you need, combined with the opportunity to practice core skills in hands on skills workshops. Specially trained Osgoode **Simulated Clients** and an expert faculty of the leading judges and family law lawyers will provide you with individualized feedback as you apply your learning and practice your skills in a supportive, no-risk learning environment.

To ensure interactivity, space is **strictly** limited. Reserve your place now!



Program At-A-Glance

- **Module 1** – March 1, 2023
Initial Client Contact and Intake
- **Module 2** – March 8, 2023
*Skills Workshop: Mastering the Client Intake Interview**
- **Module 3** – March 22, 2023
*Working With People (Your Client, Yourself, The Other Side, Judges and Self-Reps) Skills Workshop: Challenging Client Meeting**
- **Module 4** – March 29, 2023
Identifying and Defining the Issues (including Pleadings and Financial Statements)
- **Module 5** – April 5, 2023
*Consensual Resolution and Skills Workshop: Negotiation**
- **Module 6** – April 12, 2023
*When Your Matter Doesn't Settle and Skills Workshop: Case Conference**
- **Module 7** – April 19, 2023
Motions Advocacy: The Nuts & Bolts
- **Module 8** – April 26, 2023
*Skills Workshop: Motion**
- **Module 9** – May 10, 2023
Resolution and Wrapping Up the File

* The skills workshops must be completed live during the scheduled times.

In this unique and immersive practice skills experience you will learn:

- Why the initial client contact is so important
- If, when and how to use an expert
- How to set the tone, establish the relationship, and get the information you need in that first interview
- Negotiation preparation and strategies
- Strategies for managing challenging clients
- Managing client expectations
- When and how to follow up in writing – retainer and non-engagement letters, reporting letters and more
- Mediation best practices (including the all important brief)
- Constructing the client file
- Minutes of Settlement: How to properly document a settlement that's workable
- How to identify and support vulnerable clients
- Making the most out of the case conference
- How to care for yourself while working in this stressful milieu
- Motion advocacy, including the critical pre-assessment of if, how and when
- Financial Statements: how to identify and avoid costly mistakes and what to look for in the other sides'
- Properly bringing the matter to a close

Also, you will engage in and get feedback on:

- An initial client interview (with your Simulated Client)
- Case conference advocacy (with judges, senior counsel and Simulated Clients)
- A challenging client meeting (with your Simulated Client)
- Arguing a simulated motion in front of experienced judges
- Negotiation (including a pre-negotiation client meeting)

Who Should Attend

- General practitioners who want to hone their substantive knowledge and practical skills in family law
- Legal professionals who do or who plan to specialize in family law

Learn from a distinguished faculty of leading experts. Past faculty have included:

Program Directors

Julie K. Hannaford

J K Hannaford Barristers

Shelley Kierstead

Assistant Professor,
Osgoode Hall Law School

Advisory Board

Adam Black

Torkin Manes LLP

Aaron Franks

Epstein Cole LLP

Kathryn Hendrikx

Hendrikx Family Law

Janet Whitehead

Whitehead Law and Mediation

Program Faculty

Past Judges Include:

The Hon. Justice Jasmine Akbarali

Superior Court of Justice

The Hon. Justice Julie Audet

Superior Court of Justice

The Hon. Justice Kendra Coats

Superior Court of Justice

The Hon. Justice George Czutrin

former Senior Family Justice,
Superior Court of Justice

The Hon. Justice Alex Finlayson

Ontario Court of Justice

The Hon. Justice R. John Harper

Superior Court of Justice

The Hon. Justice Andrea Himel

Superior Court of Justice

The Hon. Justice Francis Kiteley

Superior Court of Justice

The Hon. Justice Marvin Kurz

Superior Court of Justice

The Hon. Justice Lene Madsen

Superior Court of Justice

The Hon. Justice Heather McGee

Superior Court of Justice

The Hon. Justice Pamela MacEachern

Superior Court of Justice, East Region –
Family Court Branch

The Hon. Justice Llana Nakonechny

Superior Court of Justice

The Hon. Justice Manjusha Pawagi

Ontario Court of Justice

The Hon. Justice Melanie Sager

Ontario Court of Justice

The Hon. Justice M. J. Lucille Shaw

Superior Court of Justice

The Hon. Justice Stanley B. Sherr

Ontario Court of Justice

The Hon. Justice Victoria Starr

Ontario Court of Justice

The Hon. Justice Suzanne Stevenson

Senior Family Judge, Superior Court of Justice

The Hon. Justice Jamie K. Trimble

Superior Court of Justice

The Hon. Justice Roselyn Zisman

Ontario Court of Justice

Yvonne Bernstein, LawPRO

Adam Black, Torkin Manes LLP

Charu Chande, J K Hannaford Barristers

Andrew Chris, Normandin Chris LLP

Sarah F. Conlin, Lerner LLP

Erin Crawford, McCarthy Hansen & Company LLP

Aaron Franks, Epstein Cole LLP

Dani Z. Frodis, Frodis Family Law

Doron Gold, Staff Clinician Homewood Health

Jennifer Gold, Wood Gold LLP

Cheryl Goldhart, Goldhart Kenet LLP

Julie K. Hannaford, J K Hannaford Barristers

Kathryn Hendrikx, Hendrikx Family Law

Gary S. Joseph, MacDonald & Partners LLP

Annie Noa Kenet, Goldhart Kenet LLP

Maxine M. Kerr, Barrister & Solicitor

Michael B. Kleinman, Kleinman Gordon
Family Law

Vanessa Lam, Lam Family Law

Brandon A. Lewis, CPA, CA, CBV, CFF,
White & Lewis

Christine Montgomery, DivorceMate Software Inc.

Deepa Mattoo, Executive Director Barbra Schlifer
Commemorative Clinic

Judith M. Nicoll, McInnis & Nicoll

Kristen Normandin, Normandin Chris LLP

Angela Pagano, J K Hannaford Barristers

Linda Popielarczyk MSW, RSW, Acc.FM (OAFM),
Connections Child and Family

Shawn Richard, Shawn Richard Family and Estate
Law

Avra Rosen, C.S., Rosen Sack LLP

Eric Sadvari, Goldhart Kenet LLP

Stephanie K. Sroka, McCarthy Hansen & Company
LLP

Erica Tait, McCarthy Hansen & Company LLP

Jared Teitel, Normandin Chris LLP

Roslyn M. Tsao, Epstein Cole LLP

Ian C. Vallance, Victor Vallance Blais LLP

Frances M. Wood, Wood Gold LLP

Register today at:

[osgoodepd.ca/
family-law-skills](https://osgoodepd.ca/family-law-skills)

Agenda

MODULE 1

March 1, 2023
9:00 a.m. – 5:00 p.m.

Initial Client Contact and Intake

Initial client contact is often the most critical part of the file. You must be able to communicate effectively, know what questions to ask, and be aware of what information your client is not sharing. In this introductory session, learn the key steps, how to avoid common pitfalls, and best practices for ensuring you do it effectively.

- ABC's of assessing the new client opportunity
- The Client Intake Questionnaire: What, why and how
- Best practices in how to use retainer agreements, including limited scope retainers
- Initial client interview:
 - Assessing if, how, and when
 - How to prepare for the first interview
 - Effective strategies for communicating with your client
 - Identifying special client issues
- What needs to happen after the meeting?
 - Post-meeting reporting (including the engagement OR non-engagement letter)
 - Assessing and communicating options and next steps

MODULE 2

March 8, 2023
9:00 a.m. – 5:00 p.m.

Skills Workshop: Mastering the Client Intake Interview*

Working with your Simulated Client, you will have an opportunity to conduct an initial intake interview and receive individualized feedback from both the Simulated Client and faculty advisor.

MODULE 3

March 22, 2023
9:00 a.m. – 5:00 p.m.

Working With People (Your Client, Yourself, The Other Side, Judges and Self-Reps)

Knowing how to effectively manage your client is crucial. Every legal professional has war stories about that difficult client. Judges frequently chastise counsel for failing to properly manage their client. In addition to managing the "difficult" or high conflict client, legal professionals need to be able to identify and know how to support vulnerable clients. This session will also provide guidance on how to work effectively with the other side, challenging judges and self-represented parties.

- Best practices and strategies for managing client expectations
- Practical toolkit for managing the difficult client meeting
- Understanding the unique issues of vulnerable clients and how these may impact behaviour and decision making
- Self-care: strategies for how legal professionals can and should support themselves when dealing with challenging clients
- Self-represented parties: Counsel's role and obligations, including what the Court expects from counsel
- Reporting letters and how to communicate so that your client understands

Skills Workshop: The "Challenging" Client Meeting*

Working with your Simulated Client, you will engage in a challenging discussion in which you will have to apply the strategies you have learned during the day to manage the client.

Receive individualized feedback both from the client perspective and from experienced counsel who will offer guidance on what worked and what you could do differently next time.

MODULE 4

March 29, 2023
9:00 a.m. – 5:00 p.m.

Identifying and Defining the Issues (including Pleadings and Financial Statements)

A common mistake is to rush into settlement discussions or litigation without having a clear sense of the critical issues. Taking the time to properly identify and define the issues, and to assess what you need to make (or defend) your case is critical. A key part of this process is the pleadings and financial statements. In this session we will drill down on effective pleadings.

Legal and financial experts will also guide you through financial statements, including strategies for gathering the key information and documents; how to identify (and avoid) common mistakes; and guidance for reviewing the other sides' statements.

MODULE 5

April 5, 2023
9:00 a.m. – 5:00 p.m.

Consensual Resolution

This session will focus on options and strategies for reaching a consensual resolution, including negotiation, mediation, and other forms of ADR.

- Overview of the key options (including their advantages, limitations, pitfalls to avoid, etc.)
- How to determine what option is right for your client
- Understanding what your client really wants and how to effectively manage their expectations
- Mediation how-to's, including the mediation brief
- Minutes of Settlement: why they are critical and how to draft them so that they work

Skills Workshop #1: Preparing Your Client for a Settlement Conference (to be completed outside of the program)

Skills Workshop #2: Simulated Negotiation*

You will have an opportunity to participate in a simulated negotiation and receive feedback on your performance.

MODULE 6

**April 12, 2023
9:00 a.m. – 5:00 p.m.
When Your Matter Doesn't Settle**

In this session we will drill down on the different non-consensual options in a family law matter. Topics include:

- Resolution tools: best practices and pitfalls
- How to make the most of settlement and case conferences
- Questioning 101

Skills Workshop: Case Conference*

Using the program case file, and working with your Simulated Client, you will have an opportunity to prepare for and participate in a case conference with a judge.

MODULE 7

**April 19, 2023
9:00 a.m. – 4:00 p.m.
Motions Advocacy: The Nuts & Bolts**

Family law motions are often where many files are “won” and “lost”. Mastering the motion is a key skill. In this session you will learn:

- How to assess if, why, when and where to bring a motion
- Strategies for determining what your client needs
- Guidance from judges about what they want and need from counsel
- Best practices for:
 - Effective written materials
 - Structuring your oral submissions
 - Preparing for Court

Refine your oral advocacy skills and learn from viewing a motion demo that will highlight best practices and things to avoid.

MODULE 8

**April 26, 2023
9:00 a.m. – 1:00 p.m.
Skills Workshop: Motions Advocacy Workshop***

Students will have an opportunity to participate in a simulated motion and perform in front of experienced judges. Hone your advocacy skills in a supportive environment, and receive individualized feedback from faculty advisors and judges about what worked and what didn't.

MODULE 9

**May 10, 2023
9:00 a.m. – 5:00 p.m.
Experts, Resolution and Wrapping Up the File**

In this final session we will explore some of the key issues related to experts, documenting your settlement and closing the file, including:

- Experts 101: the what, why and when
- How to draft effective Minutes of Settlement and Minutes of Understanding
- Key issues with Separation Agreements
- Final communication to your clients
- Missteps with last steps – the last bits many legal professionals ignore or forget, sometimes with fatal outcomes.

*** Skills workshops must be completed live during the scheduled times.**

Register today at:
osgoodepd.ca/family-law-skills



Registration Details

Fee Per Delegate: \$2,495 + TAX

Fee includes program registration, electronic program materials and 120-day unlimited online access to program archive. Group discounts are available. Visit www.osgoodepd.ca/group-discounts for details.

Financial Assistance

This program is eligible for OSAP funding. Federal and provincial job grants may be available. You may also apply for financial assistance with OsgoodePD. To learn more, visit: www.osgoodepd.ca/financial-assistance

Program Changes

We will make every effort to present the program as advertised, but it may be necessary to change the date, location, speakers or content with little or no notice. In the event of program cancellation, York University's and Osgoode Hall Law School's liability is limited to reimbursement of paid fees.

Cancellations and Substitutions

Substitution of registrants is permitted at any time. If you are unable to find a substitute, a full refund is available if a cancellation request is received in writing 21 days prior to the program date. If a cancellation request is made with less than 21 days notice, a \$150 administration fee will apply. No other refund is available.

For Further Program-Related Information, Please Contact:

Alison Hurst, Program Lawyer at 647.241.2537, or email ahurst@osgoode.yorku.ca.

Certificate of Program Completion

You will receive **The Osgoode Certificate in Family Law Skills and Practice** upon completion of all pre-program material, program modules and participation in the skills workshops. **The skills workshops can only be completed live during the scheduled times.**

Register today at:

osgoodepd.ca/family-law-skills



Email: osgoodepd@osgoode.yorku.ca



Phone: 416 597 9724



Mail: 1 Dundas Street West, 26th Floor, Toronto, ON, M5G 1Z3



OsgoodePD has been approved as an Accredited Provider of Professionalism Content by the LSO.

Eligible CPD Hours – LSO (ON): 56h 15m CPD (40h 5m Substantive; 14h Professionalism; 2h 10m EDI)



OsgoodePD programs may be eligible for CPD/MCLE credits in other Canadian and US jurisdictions. To inquire about credit eligibility, please contact cpd@osgoode.yorku.ca.



This program is approved for LAWPRO Risk Management Credit.

Past attendees say it best:

“The program is an excellent opportunity for Family Law lawyers of all skills sets to learn and grow their skills and practice. The program provided ample opportunity for feedback through guided discussion with experienced counsel and judges.”

Alexandra Forsyth-Sells

Family Law Lawyer, Grant Crawford LLP

“I absolutely loved this program! I am a new family law practitioner and the [certificate] provided me with the substantive legal knowledge necessary to feel confident handling a variety of family law issues. The feedback received from senior family law judges and experienced counsel is invaluable. Their comments ring through my mind every time I draft a factum or an offer to settle.”

Stephanie Luskey

Bradley Law P.C.

“This course is nothing like law school ... it is far better! The skills training and connecting with other lawyers was really valuable and I have already started to use what I learned in my own practice.”

Laura Shaw

Jamal Family Law P.C.