

# CHAPTER 7 AND 13 BANKRUPTCY: LINE-BY-LINE WORKSHOP

Step-by-Step Instruction With Practice Filings!

VENTURA, CALIFORNIA — MAY 20, 2011

## Faculty

Vernon L. Ellicott — *Law Offices of Vernon L. Ellicott*

Andrew Goodman — *Goodman Faith, LLP*

Lindsey B. Green — *Gumm & Green, LLP, Attorneys at Law*

Mark T. Jessee — *Law Offices of Mark T. Jessee*

## Continuing Education

California MCLE Paralegal

CLE - 6.0

ICB - 7.0 (pending)

CPE for Accountants/NASBA - 7.0

*See inside for details!*

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seminar!

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# SEMINAR OVERVIEW

## ABOUT THIS SEMINAR

### Walk Through Consumer Bankruptcy Procedures and Forms

Relying on bankruptcy software to file petitions will only get you so far. This line-by-line workshop will give you the practical knowledge necessary to double-check your software's work and confidently answer "line item" questions from trustees, creditors and judges. With the help of carefully-crafted debtor scenarios, experienced practitioners will guide you through each form you need to file, clearing up ambiguities and pointing out potential pitfalls. You'll even get detailed instruction on the ever-confusing means test and Chapter 13 plans! Bankruptcy is a field of land mines and evolving interpretations of law - make sure you're prepared to guide your clients through the filing process.

**Register today!**

## 7 BENEFITS OF ATTENDING

- Walk through the bankruptcy schedules and forms line-by-line, so you can knowledgeably explain the numbers submitted when questioned by the trustee, creditors or bankruptcy court.
- Unravel the complexity and ambiguity of the means test with veteran practitioners at your side.
- Gain a clear understanding of which chapter to file depending on your client's situation and assets.
- Learn the procedural steps for filing Chapter 7, 11 and 13, so you can confidently file cases for debtors.
- Avoid paperwork mistakes by learning how to properly complete schedules.
- Confidently structure payments and decide categories in the Chapter 13 repayment plan.
- Get insider tips on what trustees look for in consumer bankruptcy filings.

## CREDIT INFORMATION

The specific continuing education credit(s) listed are for attending the live seminar. The credits may or may not apply for the audio version of this seminar. Please check with your credit board for details. For additional questions regarding continuing education credits, please contact us at **866-240-1890**.

**California MCLE Paralegal** - This program meets the California MCLE Paralegal requirement as specified in Business and Professions Code Section 6450(d).

**CLE - 6.0** - This activity has been approved for Minimum Continuing Legal Education credit by the State Bar of California in the amount of 6.0 hours, of which 0.0 hour will apply to legal ethics. NBI, Inc. certifies this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing minimum continuing legal education. NBI, Inc. is a State Bar of California approved MCLE provider - #53. Self-study credit is available.



The Institute of Certified Bankers™ (ICB) is dedicated to promoting the highest standards of performance and ethics within the financial services industry. This program has been submitted to ICB for review and credit approval is pending.



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This program is designed to qualify for 7.0 hours (based on 50 minute credit hour) of continuing professional education credit for accountants. For more information regarding administrative policies such as complaint and refund, please contact our offices at (800) 930-6182. This is a basic level program presented in a group live setting.

This course will:

- Define the bankruptcy schedules and forms line-by-line, so you can knowledgeably explain the numbers submitted when questioned by the trustee, creditors or bankruptcy court.
- Demonstrate the complexity and ambiguity of the means test with veteran practitioners at your side.
- Examine the procedural steps for filing Chapter 7, 11 and 13, so you can begin confidently filing cases for debtors.
- Identify which chapter to file depending on your client's situation and assets.
- Analyze how to properly complete schedules to avoid paperwork mistakes.
- Define structure payments and confidently decide categories in the Chapter 13 repayment plan.
- Introduce insider tips on what trustees look for in consumer bankruptcy filings.

No advanced preparation or prerequisites are required. Field(s) of Study -- Administrative Practice.

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# SEMINAR OUTLINE

## **I. CONSUMER BANKRUPTCY FUNDAMENTALS**

*9:00 - 9:45, Vernon L. Ellicott*

- o The Basics of 7, 11 and 13: What They Are, How They Differ and Which One to Choose
- o The Client Interview, Intake Forms and Retainer Agreements

## **II. MEANS TEST WORKSHOP**

*9:45 - 10:30, Mark T. Jessee*

Using real-life debtor scenarios, experienced faculty will walk through the tricky B22A statement line-by-line to shed light on ambiguous areas and determine whether various debtors' incomes make them ineligible for Chapter 7.

## **III. BANKRUPTCY FILING PROCEDURES**

*10:45 - 11:30, Andrew Goodman*

- o Filing and Notice Procedures for Chapters 7, 11 and 13
- o Electronic Filing (ECF)
- o List of Official Bankruptcy Forms (B1-B26) and Their Purposes

## **IV. CHAPTER 7 WORKSHOP: FILLING IN THE REQUIRED FORMS LINE-BY-LINE**

*12:30 - 1:30, Vernon L. Ellicott*

Using a hypothetical case study, faculty will walk through each of the required forms, excluding the already addressed B22A.

## **V. CHAPTER 13 WORKSHOP: FILLING IN THE REQUIRED FORMS LINE-BY-LINE**

*1:30 - 2:30, Mark T. Jessee*

Using a hypothetical case study, faculty will walk through each of the required forms, including Form B22C.

## **VI. STRUCTURING THE CHAPTER 13 REPAYMENT PLAN**

*2:45 - 4:00, Lindsey B. Green*

- o Standards of Confirmation
- o Role of Exemptions in Chapter 13
- o Best Interests of Creditors Test and Best Efforts Test
- o Payment of Priority Claims and Secured Claims on Personal Property
- o Lien Stripping
- o Structuring Payments - A Case Study
- o Negotiating Plan Payments With the Trustee
- o 341 Meetings and Objections to Confirmation
- o Plan Confirmation and Modifications

## **VII. WHAT THE TRUSTEE IS LOOKING FOR IN YOUR CHAPTER 7 OR 13 FILING**

*4:00 - 4:30, Andrew Goodman*

\*If needed, the above agenda may be changed to best accommodate all of our attendees.

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Video webcasts offer attendees the opportunity to gain continuing education training through streaming audio and video.

You will also be able to view and print the reference manual, and submit questions electronically for live responses! Check out some of these upcoming video webcasts!

- February 1** Chapter 7 Bankruptcy and the Means Test (56001ER)
- February 8** Creating a Confirmable Chapter 13 Plan (56002ER)
- February 16** Personal Injury 101 (55991ER)
- February 22** Adversary Proceedings: Including Fraudulent Transfers and Preference Actions (56004ER)
- March 1** Chapter 11 Bankruptcy Essentials (56003ER)

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- February 24** Pet Estate Planning: Legal and Practical Aspects (55517ER)
- March 1** LLC Structuring Challenges: Member Rights, Issuances and Transfer of Membership Interests (55830ER)
- March 3** Head Trauma: Anatomy 101 for Attorneys (54596ER)
- March 9** Tax Considerations for Drafting Basic Estate Planning Documents (55934ER)

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### NUTS AND BOLTS OF BANKRUPTCY LAW

© August 2010 - 231 Pages (FP53167)

Are you prepared to handle consumer bankruptcy claims? A solid understanding of fundamental bankruptcy law and procedures is essential to your confidence and effectiveness as a bankruptcy practitioner. Order today to learn the technical skills needed to provide immediate protection to clients and help them establish financially stable futures.

By: Leonard J. Ackerman, Roy L. Carlson Jr. and Michael T. O'Halloran.

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### CONSUMER BANKRUPTCY: THE BASICS OF CHAPTERS 7 AND 13

© April 2010 - 71 Pages (FP52137)

Learn the nuts and bolts of filing Chapter 7 and 13 bankruptcy from the debtor's point of view! Using hypothetical clients and bankruptcy scenarios, experienced practitioners lead you through each step of the process with sample forms, schedules, means tests, repayment plans, and code citations. If you're new to the bankruptcy field, this basic, how-to instruction will give you the practical knowledge necessary to guide your clients through the complex Chapter 7 and 13 filing processes. Order today!

By: Raymond H. Aver, Stephen L. Burton, Rosendo Gonzalez and Michael T. O'Halloran.

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## OUR DISTINGUISHED FACULTY

**VERNON L. ELLICOTT** is a managing attorney with the Law Offices of Vernon L. Ellicott in Thousand Oaks, California. His areas of practice include bankruptcy law and family law. Mr. Ellicott earned his B.A. degree from George Fox College and his J.D. degree from Southwestern Law School. He is a Certified Family Law Specialist with the California State Bar Board of Legal Specialization.

**ANDREW GOODMAN** is a managing partner at Goodman Faith, LLP in Woodland Hills, California. Mr. Goodman focuses his practice in the areas of insolvency and bankruptcy. He has extensive experience handling both debtor and creditor matters. Mr. Goodman's clients include institutional and asset-based lenders, secured creditors, business and consumer debtors, bankruptcy trustees and creditors' committees. He is a member of the American Bar Association and is the immediate past chair of its Pro Bono Bankruptcy Sub-Committee. Mr. Goodman serves on the executive committee of the Los Angeles County Bar Association Commercial Law and Bankruptcy Section and is chair of the Bankruptcy Committee. He is an active participant in the Bankruptcy Pro-Bono Debtor's Assistant Project administered by the Los Angeles Public Counsel, which handles the defense of dischargeability litigation, filing Chapter 7 bankruptcies and advising debtors on whether or not to reaffirm certain debts. Mr. Goodman is a member of the American Bankruptcy Institute, the California Bankruptcy Forum, and the San Fernando Valley Bar Association. He also is actively involved in the business development and referral network Providers. Mr. Goodman teaches a bankruptcy practice

and procedures course as part of the Valley College Paralegal Program, and also teaches advanced bankruptcy and creditors' rights in the UCLA extension program. He is admitted to practice in all California courts, the U.S. District Courts in California and the 9th Circuit Court of Appeals. Mr. Goodman also is admitted to practice in the states of New York and Nevada. He earned his B.A. degree from Pitzer College and his J.D. degree from Loyola Law School.

**LINDSEY B. GREEN** is a partner in the law firm of Gumm & Green, LLP, Attorneys at Law. Mr. Green practices in the areas of consumer bankruptcy and family law, where 50 percent of his practice is devoted to litigation. He earned his J.D. degree from the University of West Los Angeles School of Law. Mr. Green is a member of the Ventura County Bar Association and the Los Angeles County Bar Association.

**MARK T. JESSEE** is a private practice attorney and principal of the Law Offices of Mark T. Jessee, where his areas of practice include bankruptcy, business litigation and transactions and estate planning/probate. Mr. Jessee earned his B.A. degree from the University of California, Los Angeles and his J.D. degree from McGeorge School of Law, University of the Pacific. He is a member of the Los Angeles County and Ventura County bar associations, and the Central District of California Consumer Bankruptcy Attorneys Association. Mr. Jessee also is a past chairman of the board of the Thousand Oaks-Westlake Village Regional Chamber of Commerce.

## WHO SHOULD ATTEND

This **basic level course** provides step-by-step instruction on filing consumer bankruptcy for:

- Attorneys new to the bankruptcy field
- Paralegals
- Credit analysts
- Bankruptcy coordinators
- Accountants

## VENTURA MAY 20

Crowne Plaza Ventura Beach  
450 E Harbor Blvd, Ventura CA 93001  
Phone: 805-648-7731

## SCHEDULE

REGISTRATION TIME 8:30 — 9:00 am

SEMINAR TIME 9:00 am — 4:30 pm

Complimentary snacks and refreshments are provided.  
Lunch is on your own.

## TUITION

\$349 for the first registrant

\$339 for each additional registrant

\$329 for new professionals - save \$20!\*

\*A new professional is anyone with three or less years of professional work experience.

## DIRECTIONS & PARKING

To obtain directions and parking information, please contact the facility listed.

## FREE REFERENCE BOOK

*Chapter 7 and 13 Bankruptcy: Line-by-Line Workshop*

Receive a comprehensive course book, included with your tuition, which you can take back to your office and use as a reference.

## AUDIO RECORDINGS

This seminar will be recorded in its entirety. If you can't attend, you can still obtain the benefits of the information provided by purchasing the manual and CD. See the registration form to order.

## CANCELLATION

Has your schedule changed? Visit us on the web or call one of our customer service representatives to learn more about your cancellation options.

## THE NBI GUARANTEE

Your satisfaction is our guarantee! If you aren't satisfied with a seminar or training resource, call or write us and we'll make it right.

\*Pre-registration is encouraged. If you need to register at the door, you may wish to call us first to confirm availability and to receive information regarding schedule or location changes.

# REGISTRATION FORM

## CHAPTER 7 AND 13 BANKRUPTCY: LINE-BY-LINE WORKSHOP

**May 20**  
Ventura, CA (55726ER)

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**\$349** — first registrant  
**\$339** — each adt'l registrant  
**\$329** — for new professionals  
(see tuition details inside brochure)

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