

**2025
VPO ANNUAL MEETING
AND
CLE CONFERENCE**

**Wednesday
May 7, 2025**



HAMPTON BY HILTON BURLINGTON-COLCHESTER
42 Lower Mountain View Drive
Colchester, Vermont
(drive to the rear for the Conference Center)

*****NFPA CLE APPROVED*****

REGISTRATION

Name(s): _____
Address: _____
Phone/e-mail: _____
Company: _____

I would like to register for:

- Attendance
- \$110 Member
 \$125 Non-Member
 \$40 Student Member
 I will NOT attend the luncheon

LUNCH – Queen City Deli Buffet

Tossed garden salad

Minestrone Soup

Option of smoked turkey breast, Virginia ham, or grilled vegetables/hummus.

Gluten Free bread can be available for those that need it.

Includes: array of cheeses, lettuce and tomato, mayonnaise or mustard, breads and rolls, chips, and cookies and brownies for dessert. Coffee, tea, lemonade and iced tea also included.

*If you have a specific dietary need, please contact Louise Reese separately.

I am interested in attending the following Seminars*:

9:00-10:30

- Track A: Angel or Devil: The Benefits and Drawbacks of Generative AI in the Legal Arena
 Track B: Long-Term Leases

10:45-12:15

- Track A: Developing a Plaintiff's Case from Intake to Mediation
 Track B: Lot Mergers

2:00-3:00

- Remote online notaries

***You can sign up to attend any seminar in any track.**

Send registration with check made payable to Vermont Paralegal Organization to:

Vermont Paralegal Organization, Attn: CLE
P.O. Box 5755, Burlington, VT 05402
*Sorry, no refunds after May 2, 2025.**

***Any payment not mailed by Wednesday, May 2, 2025, should be brought to the event rather than mailed after that date, but please email your registration form to Louise in advance.**

Questions? Contact: Louise Reese, louisereese@comcast.net

FACULTY

Carl “Ott” Lindstrom, Esq.: Angel or Devil: The Benefits and Drawbacks of Generative AI in the Legal Arena

Ott is an associate at Paul Frank + Collins, P.C. in Burlington, and a member of the Litigation team. Before joining PF+C, Ott was a Law Clerk with Vermont Superior Courts, and prior to that, worked at a Virginia-based boutique IP firm. He presently serves as the Vermont Bar Association President Designee on the Vermont Judiciary Committee on Artificial Intelligence and the Courts. Ott is a frequent speaker on artificial intelligence issues in the legal field and has been published several times for his work on the intersections of law and technology.

Tina Shoup, Esq: Developing a Plaintiff’s Case from Intake to Mediation

Tina is a director at Shoup Evers & Green, PLLC in Burlington. Her practice focuses on Plaintiff’s cases involving medical negligence or personal injury. Prior to her admission to the Vermont Bar, Tina worked as a registered nurse.

R. Prescott (Scott) Jaunich, Esq.: Long-Term Leases

Scott is a director at Downs Rachlin Martin, PLLC in Burlington. He is the chair of the Real Estate Group, and he maintains a commercial real estate and high-end residential and resort practice. His leasing practice includes not only commercial, retail and manufacturing facilities, but also green leasing and site and ground leasing for renewable energy and telecommunication facilities.

Aaron Monahan, Esq., Lot Mergers

Aaron currently works as Underwriting Counsel as part of the Vermont and New Hampshire First American Agency Teams. Prior to joining First American, Aaron was an attorney at a Massachusetts law firm focused on all aspects of residential and commercial real estate closings. His responsibilities included reviewing title examinations for clearance, drafting and negotiating purchase and sale agreements, drafting deeds, powers of attorney, affidavits, and closing settlement statements. His background also includes experience serving as a senior underwriting paralegal for a national title insurance underwriter, commercial real estate paralegal and senior paralegal for law firms in Massachusetts.

James Knapp, Esq. – Remote Online Notaries

Jim is a retired attorney with 40+ years of experience in the practice of law. During his career he was in private practice with Gravel & Shea, P.C., and Mickenberg, Dunn, Lachs, & Smith, PLC. He served as an underwriter and State Counsel for three national title insurance companies and was the Interim Director of the Property Valuation and Review Division of the Vermont Department of Taxes. He also served as the Program Coordinator for the Vermont Bar Association Law Practice Management Program. Throughout his career and into retirement Mr. Knapp has presented at continuing education programs for the Vermont Bar Association, for-profit continuing education providers, the Vermont Paralegal Organization, the Vermont Bankers Association, and for private firms implementing in-house training programs. Most recently he presented the real estate section of the VPO program - Pathways to Paralegal Profession. Presentation topics include all areas of real estate law and practice, title insurance, ethical considerations in law practice, professionalism, and the application of technology to the practice of law. Mr. Knapp was an adjunct instructor in the Paralegal Program at Champlain College and for two years at Vermont Law School.

AGENDA

8:30 – 9:00

Registration (continental breakfast, including coffee, tea, and juice)

9:00-10:30

Track A	Track B
Angel or Devil: The Benefits and Drawbacks of Generative AI in the Legal Arena – Ott Lindstrom of Paul Frank + Collins	Long-Term Leases – Scott Jaunich of Downs Rachlin Martin

10:30 – 10:45 Morning Break

10:45-12:15

Track A	Track B
Developing a Plaintiff's Case from Intake to Mediation – Tina Shoup of Shoup Evers & Green	Lot Mergers – Aaron Monahan of First American Title Insurance Company

12:15 – 1:45

Lunch and Voting

2:00-3:00

Remote Online Notaries – James Knapp	
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It is not necessary to sign up for only one track. You can choose to attend any seminar in any track.

TRACK A:

Angel or Devil: The Benefits and Drawbacks of Generative AI in the Legal Arena

The ongoing artificial intelligence boom prompted by the proliferation of generative AI tools (GAI) has rapidly transformed the way countless industries conduct business. The legal field is no exception.

This session will discuss:

- A general overview of generative Artificial Intelligence (GAI)
- Benefits and risks in the use of GAI
- Effective implementation of GAI in a legal practice.

Developing a Plaintiff's Case from Intake to Mediation

The session will include::

- Screening potential cases
- Medical records: contents of complete medical record, which records to order and how best to order
- Researching pertinent issues
- Liens: Obtaining lien information, tracking and updating liens
- Assisting with mediation preparation

TRACK B:

Long-Term Leases

This session is expected to cover:

- Benefits of long-term lease vs. ownership; why it's so common in commercial real estate development
- Statutes for documenting and recording Leases
- State and local subdivision requirements when Leases divide parcels of land
- Subdivision exemptions (e.g., solar array leases)
- Title insurance leasehold policies
- State transaction tax considerations (e.g., transfer tax, non-resident withholding)
- IRS reporting requirement (1099-S)

Lot Mergers

This session is expected to cover:

- The benefits and detriments of merging contiguous lots by deed
- Property tax lot mergers required by state law; no effect on lot merger for deed and permit purposes
- Existing small lot statute re: automatic merger
- Local zoning requirements for minimum lot sizes; municipality can confirm whether merger occurred
- Title search reminder for merger red flags

AFTERNOON SESSION:

Remote Online Notaries

This session will cover the permanent rules recently implemented by the Vermont Secretary of State, and the RON requirements.