

The Family Law Section of The Florida Bar  
Presents

**2023**

# **Trial Advocacy Workshop**

**Course Classification: Advanced Level**

**Thursday, July 13 - Sunday, July 16, 2023**

**LIVE PRESENTATION**

**JW Marriott Orlando, Grande Lakes**

**4040 Central Florida Parkway  
Orlando, FL 33837  
(407) 206-2300**



**Attendance is Limited to 80 Registrants!**

**No On-Site Registration**

**COURSE NO. 7169**

# 2023 Trial Advocacy Workshop

Make plans now to attend the 2023 Trial Advocacy Workshop. Hone your trial skills as you prepare and present a family law case from beginning to end. Choose between a "Children's Issues" track or a "Financial Issues" track (preferences will be considered but are not guaranteed). You will be paired with an opposing counsel and will be part of a small group where you will receive individualized attention and critique from your workshop leaders, all of whom are either Board-Certified Marital and Family Law attorneys, judges, or general magistrates. You will meet with mental health experts ("Children's Issues" track) or financial experts ("Financial Issues" track) and will have an opportunity to ask questions and engage in open discussions. The Trial Advocacy Workshop always sells out, so take this opportunity to change the way you approach a contested family law proceeding and sharpen your trial tools. And for those hoping to become Board Certified or re-Certified in Marital and Family Law, remember that completion of the Trial Advocacy Workshop counts toward your trial requirement.

## Registration and Hotel Information

### Registration Fee: \$995 Family Law Section Members, \$1,045 Non-Section Members

You MUST register ONLINE through The Florida Bar Member Portal (<https://www.floridabar.org/member>). After you log in, go to CLE EVENTS/MEETINGS/SEARCH BY COURSE NUMBER 7169. Alternatively, to pay via credit card, call The Florida Bar Accounting Department (850) 561-5831. REGISTRATIONS ARE LIMITED AND THERE IS NO ON-SITE REGISTRATION. A limited number of scholarships are available. The application is available online at [www.familylawfla.org](http://www.familylawfla.org).

A block of rooms has been reserved at the JW Marriott Orlando, Grande Lakes at the Rate of \$199 single/double occupancy. Reservations must be made by Wednesday, June 21 to ensure group rate and availability.

### MAKE YOUR HOTEL RESERVATIONS AT:

<https://book.passkey.com/go/TheFloridaBarFamilyLaw23>

**REFUND POLICY:** The total number of registrants is limited. Registrations must be accompanied by the registration fee and will be accepted in chronological order as they are received. Cancellations are accepted up to 30 days before the Workshop. **After June 13, there will be no refunds. A \$25 service fee applies to all refund requests.**

**COURSE MATERIALS:** Download information for all course materials will be e-mailed to all registrants prior to the Workshop. Attendees MUST bring their materials with them. No materials will be available on-site. Please note: Hotel Wi-Fi is NOT available in meeting areas, so please plan accordingly.

## Certification Credits

### CLE Credits

General: 24.0 hours  
Ethics: 1.0 hour

### Certification Credits

Civil Trial: 24.0 hours  
Criminal Trial Law: 24.0 hours  
Marital & Family Law: 24.0 hours

# Schedule of Events

## Thursday, July 13, 2023

1:00 p.m. – 3:00 p.m.

Check-In Registration

5:00 p.m. – 6:00 p.m.

Dinner and Lecture: Opening Statements (Breakout Tracks)

- “Financial Issues” Track: (*Alex Caballero, BCS\**)
- “Children’s Issues” Track: (*Christine Derr, BCS\**)

## Friday, July 14, 2023

6:45 a.m. – 7:30 a.m.

Friends of Bill W Meeting (closed meeting)

7:30 a.m. – 8:30 a.m.

Breakfast & Lecture on Professionalism & Ethics: (*Scott Westheimer<sup>o</sup>, Florida Bar President*)

8:30 a.m. – 11:00 a.m.

**WORKSHOP: Presentation of Opening Statements**

11:05 a.m. – 11:10 a.m.

Break

11:15 a.m. – 12:25 p.m.

Lecture: Direct & Cross Examination (Breakout Tracks)

- “Financial Issues” Track: (*General Magistrate Jon Johnson, BCS\**)
- “Children’s Issues” Track: (*Joseph Hunt, BCS\* and Philip Schipani, BCS\**)

12:30 p.m. – 1:30 p.m.

Lunch and Learn on Evidentiary Issues (Breakout Tracks)

- “Financial Issues” Track: (*Judge Laura Burkhart and Meghan Clary, BCS\**)
- “Children’s Issues” Track: (*Dori Foster-Morales, BCS\**)

1:30 p.m. – 1:35 p.m.

Break

1:40 p.m. – 2:40 p.m.

**WORKSHOP: Prepare Fact Witnesses on Direct & Cross Examination**

2:40 p.m. – 2:50 p.m.

Break

3:00 p.m. – 5:30 p.m.

**WORKSHOP: Presentation of Direct & Cross Examination of Fact Witnesses**

6:00 p.m. – 7:30 p.m.

Welcome, Mix & Mingle / Reception (*Heavy Hors d’oeuvres*)

7:15 p.m. – 9:30 p.m.

Speakers’ Dinner (*By Invitation Only*)

## Saturday, July 15, 2023

7:00 a.m. – 8:00 a.m.

Friends of Bill W Meeting (closed meeting)

8:00 a.m. – 9:30 a.m.

Breakfast & Lecture: Working with and Against Experts (Breakout Tracks)

- “Financial Issues” Track: (*Matthew Stohlman, CPA, and Jorge Cestero, BCS\**)
- “Children’s Issues” Track: (*Deborah Day, PsyD. and Elisha Roy, BCS\**)

9:30 a.m. – 9:45 a.m.

Break

9:45 a.m. – 12:00 p.m.

**WORKSHOP: Meeting with Expert Witnesses (Q & A Session)**

2:00 p.m. – 1:30 p.m.

**Box Lunch: Prepare Experts for Direct and Cross Examination**

1:30 p.m. – 1:50 p.m.

Break

2:00 p.m. – 5:00 p.m.

**WORKSHOP: Presentation of Direct and Cross Examination of Experts**

5:30 p.m. – 7:00 p.m.

Dinner & Lecture: Closing Statements (Breakout Tracks)

- “Financial Issues” Track – (*Kenneth A. Gordon, BCS\**)
- “Children’s Issues” Track – (*Reuben Doupé, BCS\**)

## Sunday, July 16, 2023

8:00 a.m. – 9:00 a.m.

Friends of Bill W Meeting (closed meeting)

9:00 a.m. – 10:00 a.m.

Brunch: Final Q & A, and Closing Remarks (*General Session*)

10:00 a.m. – 12:00 p.m.

**WORKSHOP: Presentation of Closing Statements**

# Family Law Section

Sarah E. Kay, BCS\*, Chair  
Christopher W. Rumbold, BCS\*, Chair-Elect  
Aimee Gross, BCS\*, Treasurer  
Tenesia Hall, Secretary (*Nominated*)  
General Magistrate Philip S. Wartenberg, BCS\*, Immediate Past Chair

## 2023 Trial Advocacy Workshop Committee

Chelsea A. Miller, Vero Beach – Program Co-Chair  
Amanda P. Tackenberg, Miami – Program Co-Chair  
Julia Wyda, BCS\*, Boca Raton – Program Co-Chair

## Expert Witnesses

### MENTAL HEALTH PROFESSIONALS

Chelsea Bennett, PsyD.  
Amy Cuccuro, PsyD.  
Deborah O. Day, PsyD.  
Melvin Pagan, PsyD.

### GUARDIANS AD LITEM

Maria Gonzalez, Esq., BCS\*  
Yueh-Mei Kim Nutter, Esq., BCS\*  
C. Debra Welch, Esq.  
Ellen Dee Silvers, Esq.

### FINANCIAL PROFESSIONALS

Cassandra Ferrer, CPA/CFE  
Ari S. Harper, CPA/ABV/CFE  
Matthew A. James, CPA/ABV/CFF/MAFF  
Melinda Mergelsberg, CPA/CVA  
Cinnamin O'Shell, CPA/ABV/CVA/CFE  
Anthony S. Phillips, CPA/ABV/CFF  
Gerard Samoleski, CPA/ABV/CFF/CVA/CFE  
Anthony D. Samons, CPA/CFF/PFS/CDFA  
Philip H. Shechter, CPA/ABV/CVA  
Joshua Shilts, CPA/ABV/CFF/CGMA/CFE  
Jonathan Stief, JD/CPA/ABV/CFF/PFS  
Matthew Stohlman, CPA/ABV/CFE/CFF

### WORKSHOP LEADERS

Honorable Lauren Alperstein, Broward  
Grant Gisondo, Esq., BCS\*, West Palm Beach  
Caryn Green, Esq., BCS\*, Orlando  
Aimee Gross, Esq., BCS\*, Broward  
Luis Insignares, Esq., BCS\*, Fort Myers  
Ronald H. Kauffman, Esq., BCS\*, Miami  
Magistrate Diane Kirigin, BCS\*, Delray Beach  
Magistrate K. Beth Luna, Jacksonville  
Magistrate Ilana Marcus, BCS<sup>◇</sup> West Palm Beach  
Jack Moring, Esq., BCS\*, Crystal River

Catherine Rodriguez, Esq., BCS\*, Miami  
Elisha Roy, Esq., BCS\*, West Palm Beach  
Christopher Rumbold, Esq., BCS\*, Fort  
Lauderdale  
Andrew L. Salvage, Esq., BCS\*, Fort  
Lauderdale  
Honorable Robert Segal, Brevard  
Bonnie Sockel-Stone, Esq., BCS\* Miami  
Honorable Christopher Sprysenski, Seminole  
Honorable Jennifer Taylor, Brevard  
Karen Weintraub, Esq., BCS\*, Fort Lauderdale  
Magistrate Maxine A M Williams, Palm Beach

\* Board Certified Specialist, Marital and Family Law  
◇ Board Certified Specialist, Criminal Trial Law

# Speakers

Honorable Laura Burkhart, Delray Beach  
Alex Caballero\*, Tampa  
Jorge Cestero\*, West Palm Beach  
Meghan Clary\*, Fort Lauderdale  
Deborah O. Day, PsyD., Winter Park  
Christine Derr\*, Tampa  
Reuben Doupé\*, Naples  
Dori Foster-Morales\*, Miami  
Kenneth Gordon\*, Fort Lauderdale  
Joseph Hunt\*, Tampa  
Magistrate Jon Johnson+, Tampa  
Elisha Roy\*, West Palm Beach  
Philip Schipani\*, Sarasota  
Matthew Stohlman, West Palm Beach  
Scott Westheimer°, Sarasota

\*Board Certified Specialist, Marital and Family Law

+ Board Certified Specialist, Appellate Practice

°President of the Florida Bar