



# CLLA WESTERN REGION CONFERENCE

**September 7-8, 2023**  
**Westin Anaheim Resort**

ATTEND *In-Person* OR *Virtually!*

**EARLY BIRD REGISTRATION DEADLINE: JULY 26, 2023**

**Event Registration & Hotel Reservation Deadline:**  
**Wednesday, August 16, 2023**



**ANAHEIM**  
**ATTENDEE GUIDE**

## WELCOME TO THE CLLA WESTERN REGION ANNUAL CONFERENCE!



Tim Grimes

We are excited to welcome you to the CLLA Western Region Annual Conference. Our agenda (available at [CLLA.org](http://CLLA.org)) has something for everyone and will further

your understanding and knowledge of the latest trends and issues in the world of commercial collections. Don't miss out on the chance to update your professional knowledge, share valuable experiences and tips with colleagues, and enjoy the fun of social activities in Disneyland.

Join us for beautiful Southern California weather, insightful and worthwhile educational presentations, and the pleasure of connecting with your friends in the industry. You will be able to establish new relationships, enhance your networks, and create additional business opportunities – not to mention earning CLE's and CEU's.

We look forward to seeing you at the conference!

Timothy Grimes  
Chair, CLLA Western Region

## SPONSORSHIP OPPORTUNITY: \$125

Get your firm's logo placed on the CLLA Events page, conference eblasts, NewsWire, AGENCYAction, and opening slides at all sessions. Choose to sponsor when registering for the event.

**SOLD OUT**

*Exclusive Opportunity*

**Multiple Device Charging Station - \$250**

In addition to the sponsorship benefits above, this exclusive opportunity will prominently display your company logo at the event charging station.

## Event Location

# Westin Anaheim Resort

1030 West Katella Avenue • Anaheim, CA 92802 • (657) 279-9786

## Join the Western Region in Anaheim!

The Westin Anaheim Resort is a AAA Four-Diamond hotel next to the Anaheim Convention Center and across the street from Disneyland, for a conference full of opportunity to enhance the value of Creditors' Rights Attorneys, Commercial Collection Agencies and Law Lists.

Meet with colleagues for stimulating, in-depth discussions and attend exclusive education events that will address issues that matter to you and speak to the current state of our industry. Take advantage of the chance to network and learn from others who have knowledge and experience to share. Attend to receive the high-quality education you have come to expect from CLLA in an exciting new location.

## Who Should Attend

Professionals who benefit the most are those who attend structured meetings to maximize contact with colleagues from around the US, Canada and abroad. This in-person conference attracts an audience of professionals from various aspects of the commercial law arena interested in forming business connections. The conference site and schedule will allow you to do business and still take advantage of all that Anaheim, California has to offer. For more details visit [www.CLLA.org/events](http://www.CLLA.org/events).

## Hotel Reservations

A small room block has been reserved for this conference. Make your hotel reservation as early as possible to ensure you receive the discounted rate (subject to availability).

**Phone reservations** can be made by calling the Reservations Department at **877-264-9786**. Be sure to mention you are with the **CLLA Western Region Conference** to receive the group rate.

**On-line reservations** can be made by visiting <https://book.passkey.com/go/CLLA2023>

**Room Rate:** \$276/night, single/double occupancy, plus applicable taxes (currently 17.23%) (NO resort fee). **Room cut-off is Wednesday, August 16, 2023.** Visit [CLLA.org/Events](http://CLLA.org/Events) web page to access the online hotel reservation link.

## Registration Fees

**Registration & Hotel Reservation Deadline is**

**Wednesday, August 16, 2023**

Registration Fee	Early Bird* Thru 7/26	Regular* Thru 8/16
CLLA & IACC Members	\$479	\$579
Spouse/Guest**	\$249	\$249
Non-Members	\$958	\$958
VIRTUAL Registration Fees	Early Bird* Thru 7/26	Regular* Thru 8/16
CLLA & IACC Members	\$479	\$479
Non-Members	\$958	\$958

\*Disclaimer: CLE credit available to attendees in qualifying states who register on or before Wednesday, July 26. We cannot guarantee state accreditation after July 26.

\*\*Please note that business colleagues are not eligible to register under this category.

## Registration Fees for Friday Includes:

### Member/Non-Member

- Educational sessions
- CLE/CEU education credits
- Continental breakfast
- AM/PM breaks
- Luncheon
- Reception

### Spouse/Guest\*

- Continental breakfast
- AM/PM breaks
- Luncheon
- Reception

### Virtual

- Educational sessions
- CLE/CEU education credits



# 2023 Schedule of Events

Thursday, September 7, 2023

6:00 p.m. – 8:00 p.m.

## Optional Group Dinner:

**Rodrigos Mexican Grill, 2681 W. La Palma, Anaheim, CA 92804, (714) 995-2661**

(Additional charge of \$55 per person includes meal and non-alcoholic beverages. Pre-registration is required.)

Friday, September 8, 2023 Westin Anaheim Resort • 1030 West Katella Avenue • Anaheim, CA 92802 • (657) 279-9786

8:00 a.m. – 8:30 a.m.

**REGISTRATION, BREAKFAST AND WESTERN REGION MEETING WITH ELECTIONS (Gloriana Room)**

8:30 a.m. – 9:45 a.m.

**CLE CEU ENFORCING INTERNATIONAL, CANADIAN AND SISTER-STATE JUDGMENTS AND JUDGMENTS IN FOREIGN CURRENCY**



**Peter Dubowsky**  
Dubowsky Law  
Office, Chtd.  
Las Vegas, NV



**Martin Greenbaum**  
Greenbaum Law  
Group, LLP  
Newport Beach, CA

Are you an attorney or agency collecting on a judgment from another state, another country, or suing on an invoice in a foreign currency? If so, there are uniform laws that your jurisdiction has enacted, or will be enacting, that affect your case. Learn what you need to know about the Uniform Foreign-Country Money Judgments Recognition Act, the Uniform Registration of Canadian Money Judgments Act, the Uniform Foreign-Money Claims Act, Uniform Enforcement of Foreign Judgments Act, and the fun issues that arise under those laws. This interactive presentation will discuss the juicy issues that arise under those laws.

**Speakers: Peter Dubowsky, Dubowsky Law Office, Chtd., Las Vegas, NV and Martin Greenbaum, Greenbaum Law Group, LLP, Newport Beach, CA**

9:45 a.m. – 10:00 a.m.

**NETWORKING BREAK**

10:00 a.m. – 11:15 a.m.

**CLE CEU DEVELOPMENTS IN STATE LAWS AND FTC REGULATIONS GOVERNING AUTOMATIC-RENEWAL LAWS**



**Michael Jaeger**  
Mayer Brown LLP  
Los Angeles, CA

Michael Jaeger will discuss recent developments in the regulation of automatic-renewal and continuous-subscription contracts and programs, including existing state laws, recent amendments to those state laws, and a new proposed comprehensive rule from the Federal Trade Commission.

**Speaker: Michael Jaeger, Mayer Brown LLP, Los Angeles, CA**

11:15 a.m. – 11:30 a.m.

**NETWORKING BREAK**

11:30 a.m. – 12:45 p.m.

**CLE CEU PRIVATE EYES – THEY ARE WATCHING YOU: UPDATING THE CALIFORNIA CONSUMER PRIVACY ACT**



**June Coleman**  
Messer Strickler  
Sacramento, CA

California's Legislature enacted the California Consumer Privacy Act in 2018, to avoid an initiative. However, the California Consumer Rights Act was enacted by Californians in 2020. Most of the provisions went into effect in January 2023. Find out what changes went into effect and how that impacts collection efforts from Californians.

**Speaker: June Coleman, Messer Strickler, Sacramento, CA**

12:45 p.m. – 1:30 p.m.

**LUNCH (Sonia Room)**

1:30 p.m. – 2:45 p.m.

**CLE CLIENT TRUST ACCOUNTING AND RECENT UPDATES**



**Deborah A. Wolfe**  
Wolfe Legal Solutions, PC  
La Mesa, CA

Deborah will be talking about Rule 9.8.5 of the California Rules of Court, and Rules of Professional Conduct 1.4 and 1.15; who has to report and certify their client trust accounts and by when, as well as who is exempt from reporting; what the above states Rules mean in terms of everyday practice; how to avoid commingling funds; applicable case law; what to do with unclaimed funds; and best practices to follow in order to avoid State Bar discipline.

**Speaker: Deborah A. Wolfe, Wolfe Legal Solutions, PC, La Mesa, CA**

2:45 p.m. – 3:00 p.m.

**NETWORKING BREAK**

3:00 p.m. – 4:15 p.m.

**CLE CEU NAVIGATING THE LICENSING MAZE: KEY LICENSING REQUIREMENTS YOU NEED TO KNOW**



**Christy Young Barger**  
Cornerstone Support  
Roswell, GA

Christy will provide a comprehensive overview of licensing requirements in the commercial and consumer debt collection landscape. Led by licensing expert Christy Young Barger, Director of Risk Management at Cornerstone Licensing Services, one of the nation's largest and most respected licensing companies, this session will explore the ins and outs of obtaining and maintaining licenses, looking at topics such as:

Which states require licensing? Where does it differ if you are collecting consumer debt? Commercial debt? Who must be licensed? What's involved in getting licensed (surety bonds, finger printing, background checks)? How long does it take?

This session will strengthen your licensing knowledge and arm you with potential tools available to help you navigate regulatory frameworks and ensure compliance.

**Speaker: Christy Young Barger, Cornerstone Support, Roswell, GA**

4:30 p.m. – 5:30 p.m.

**POST CONFERENCE SOCIAL (Sonia Room)**

6:00 p.m.

**DINNER ON YOUR OWN**

**Questions? Please contact Dawn Federico at 312-240-1400 or at [dawn.federico@cila.org](mailto:dawn.federico@cila.org).**

# Important Information

## Code of Conduct

The Commercial Law League of America has zero-tolerance for discrimination and all forms of harassment, including but not limited to sexual harassment. Our zero-tolerance policy means that no form of discriminatory or harassing conduct by or towards any CLLA member, exhibitor, presenter, attendee, vendor or staff member will be tolerated. The CLLA is committed to assuring compliance with its policy at all levels within the association. By registering for this event, you agree to accept the Code of Conduct Policy.

## CLE Credit

The CLLA is applying for CLE with those states that require CLE credits for their licensed attorneys. All attorneys will receive a CLE Attendance Record form in their registration packet. At the conclusion of the Conference, please submit your form via email to [mary.mccann@clla.org](mailto:mary.mccann@clla.org) by Friday, September 22, 2023, or drop off your form at the Registration Desk.

## CEU Credit

All CLLA Certified Agencies will receive a CEU Attendance Record form in their registration packet if recertification credits for the next fiscal year are needed. At the conclusion of the Conference, please submit your form via email to [mary.mccann@clla.org](mailto:mary.mccann@clla.org) by Friday, September 22, 2023, or drop off your form at the Registration Desk.

## Dress Code

All CLLA Conference events are business casual.

## Presentation Information

CLLA's 2023 Western Region Conference presentation materials will be available to view and download through a link provided via email one week before the meeting.

## Name Badges

The CLLA requires all attendees to properly display their name badge at all Conference sessions and events.

## Cell Phones

Please be considerate in your cell phone use. CLLA requests that electronic devices be silenced in all sessions as a courtesy to the presenters and attendees.

## Special Needs

The CLLA is happy to assist you with any special needs or requirements you may have. Please visit the Registration Desk or contact any staff member.

## How do I access sessions virtually?

All sessions will be accessible via Zoom. You will find links for sessions through the 2023 Western Region Conference website. You will also receive an email that will include the links to the education sessions. We recommend downloading the Zoom app and setting up an account (it is free) before the first session. You can download it here: <https://zoom.us/download>.

## Will I receive CLE/CEU for participating in the live sessions virtually?

All live sessions will be accredited with the state(s) in which members are registered. Be sure to register on or before Wednesday, July 26, 2023, in order to receive CLE state(s) accreditation.

## What happens if I am unable to attend the live sessions virtually?

Don't worry, all the sessions will be recorded and available up to 30 days following the conference to all registered attendees. Some states are allowing more flexibility with pre-recorded credits due to the pandemic. We will do everything possible to get all pre-recorded sessions accredited with each state. We ask that you know your states requirement(s) to insure acceptance of your session(s) for CLE.

To adhere to most states' accreditation of CLE's for recorded sessions, the recorded sessions must be "interactive". You will be asked to identify a "prop" towards the beginning and towards the end of the presentation which will be required on your CLE Form. The session moderator will tell you what to look for during the opening remarks of the session. Forms are available for download on the conference website.

## Cancellation Policy

Cancellations must be submitted in writing to [dawn.federico@clla.org](mailto:dawn.federico@clla.org). Registration fee refunds will be granted on the following schedule: Cancellation notices received by Friday, August 18, 2023 will receive 100% refund less \$50 processing fee. Notices received between August 26-31 will receive a 50% refund. No refund will be provided for notices received on or after Friday, September 1.







**Christy Young Barger**, Director of Risk Management-Licensing-Cornerstone Support, LLC, professional career began with a passion and talent in the legal profession. Prior to working at Cornerstone, she was a Paralegal who specialized in estate, civil, corporate and real estate law. Through that position she attended and participated in many court proceedings, including civil jury trials against high profile corporate agencies.

In 2005 she started at Cornerstone Support, Inc. as a Renewal Specialist. This position allowed her to work with both clients and regulators directly with each state, to ensure the clients' business licensing was done correctly and on time. After several promotions within Cornerstone, Christy has become a veteran employee who is today the Director of Risk Management-Licensing.

During the last 17+ years with Cornerstone, Christy has formed and maintained valuable client relationships. In her current role she speaks with the collection industry's leaders to navigate clients through the following:

- new licensing based on agency activity
- statutory compliance notifications regarding corporate changes
- overall client expansion and development

Her passion to see her clients succeed calls for her to continuously study the latest state licensing requirements and regulations to ensure proper licensing.



**June D. Coleman**, Managing Attorney for the California Office of Messer Strickler, Ltd., is a defense litigator with about 25 years of experience. Her areas of emphasis include defense of consumer rights actions involving the FDCPA, TCPA, and FCRA. She has a deep understanding of permissible debt collection conduct and how best to defend claims and minimize liability in the collection industry. She is also familiar with governmental investigations and prosecutions, including those conducted by AGs and the CFPB, as well as defending collection attorneys before the California State Bar.

Since 2008, Ms. Coleman has been voted by her peers as one of the top lawyers practicing in Northern California and Sacramento, earning her a spot on the Northern California Super Lawyers list; the "Best of the Bar" list by the Sacramento Business Journal, and the "Top of the Bar" list by the Sacramento Magazine. Ms. Coleman has also been recognized by Accounts Recovery as one of the leading attorneys in the collections field for her defense work. Ms. Coleman is a Martindale Hubbell AV Preeminent rated attorney.



**Martin B. Greenbaum** attended UCLA for both his undergraduate and law degrees. He acquired intensive trial experience while serving as Deputy District Attorney with the Los Angeles District Attorney's Office for almost five years. Since then, he has been engaged in collection, enforcement of judgments, debt recovery, and construction cases. Mr. Greenbaum is the senior attorney with the law firm of Greenbaum Law Group, LLP and limits his practice to collection and loss recovery. Mr. Greenbaum is rated "AV" by Martindale-Hubbell Law Directory, the highest rating given by the most prestigious attorney rating directory in the United States. Mr. Greenbaum has served as an instructor and presenter for seventeen California Continuing Education of the Bar (CEB) programs on Enforcement of Judgments and Post-Trial Practice. He has served as an instructor for multiple Lorman and NBI seminars, Bar Association seminars, and specialty group presentations. He has served as a University of California Extension Instructor for legal assistance courses concerning Obtaining and Enforcing Money Judgments and Mechanics Liens, at Irvine, Los Angeles, Riverside, San Diego and Santa Barbara campuses. He has been a chairperson of the Orange County Bar Association Creditors' Rights Section. Mr. Greenbaum has lectured widely to trade and business groups on the topics of credit, collection, and construction collection. He provides expert witness services on collection and collectability issues. He is admitted to practice law in California, Colorado and New York.



**Peter Dubowsky, Esq.** is an attorney, comedy performer, and history lecturer. He has been a collection litigator in Nevada since his admission to the Nevada Bar in 1993. He frequently speaks and writes throughout the United States on topics including commercial collections, ethics, judgment and foreign judgment enforcement, solo practice, forum selection clauses, and "Pay When Paid" provisions of a construction subcontract, among others.

He is a founding officer of the CREDITOR RIGHTS ATTORNEYS ASSOCIATION OF NEVADA, INC. and a Law League member since 1995.

Peter has been serving as a Las Vegas Justice Court Small Claims Judge Pro Tempore since 1998. In 2011, the Nevada Supreme Court appointed Mr. Dubowsky as a mentor to newly admitted attorneys in the "Transition Into Practice" Program.

Peter has also been adjunct law faculty at the College of Southern Nevada Paralegal Degree Program, and a Nevada Certified Collection Agency Manager.

He graduated from Florida International University in Miami, Florida, and attended Southwestern Law School in Los Angeles, California.



**Michael Jaeger** represents clients in class actions and complex litigation in state and federal courts across the country with a particular focus on privacy and consumer protection defense. Michael's experience includes claims brought under the California Consumer Privacy Act (CCPA), the California Invasion of Privacy Act (CIPA), Illinois' Biometric Information Privacy Act (BIPA), Florida's Security of Communications Act (FSCA), the Telephone Consumer Protection Act (TCPA), California's Unfair Competition Law (UCL), California's Consumers Legal Remedies Act (CLRA), the Americans with Disabilities Act (ADA), and California's Unruh Civil Rights Act, among others. Michael also has significant experience in a broad range of business disputes and related litigation, including in the areas of COVID-19 liability, sports and entertainment, false advertising, product liability, labor and employment, RICO, construction defect, ERISA, and franchising.

Michael also counsels clients on compliance and litigation avoidance in the areas of privacy and data protection, online terms and conditions, arbitration provisions, class action waivers, and automatic renewal/continuing subscription programs, is the author of Practical Law's guidance on state automatic renewal laws, and is a part of the Uniform Law Commission's Recurring Service Charges Drafting Committee. He has also written and presented on risk management and liability issues related to autonomous vehicles.



Wolfe Legal Solutions, PC, established by **Deborah A. Wolfe**, a civil trial lawyer in California since 1981, is designed to help attorneys to practice at the highest levels in helping their clients.

Deborah is a Certified Legal Specialist ("CLS") in two areas of practice: Legal Malpractice Law (State Bar of California) and Civil Trial Law (National Board of Trial Advocates).

Deborah is an experienced trial attorney who has served on the State Bar of California Legal Malpractice Law Advisory Commission, and has been a member of the San Diego County Bar Association's Legal Ethics Committee since 2006. She is a past president of CASD, and a two-time recipient of the Trial Lawyer of the Year award, as well as numerous Outstanding Trial Lawyer awards. In 2017, Deborah received the Daniel T. Broderick, III award for civility, integrity and professionalism. She frequently testifies as an expert witness in ethics and standard of care in legal malpractice/breach of fiduciary duty cases, in addition to assisting lawyers with ethics consulting, trial strategy and support.





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***Take Your Business to the Next Level of Competition...***



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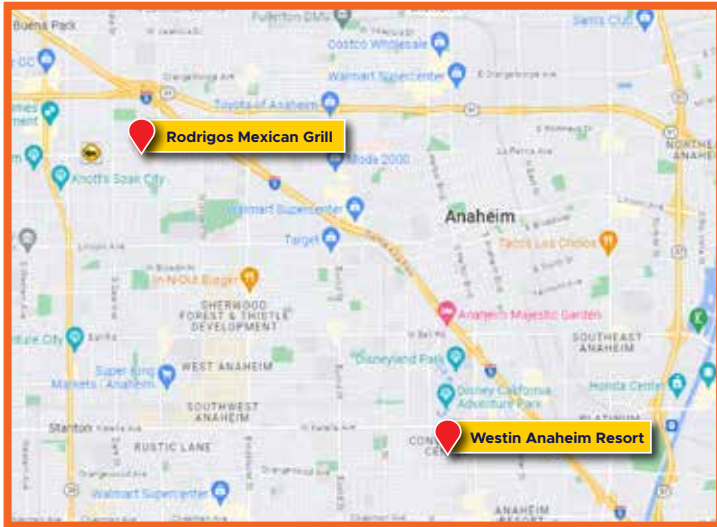
For more information, contact Dawn Federico at 312-240-1400 or email [dawn.federico@ccla.org](mailto:dawn.federico@ccla.org) All benefits are based on a twelve month period.



## Event Location

### Westin Anaheim Resort

1030 West Katella Avenue  
Anaheim, CA 92802  
(657) 279-9786



*Thank You Champions!*



*Save the Dates*



**COMMERCIAL LAW LEAGUE OF AMERICA** ASSOCIATION OF COMMERCIAL LAW, COLLECTION LAWYERS AND AGENCIES  
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