



**Association of Attorney-Mediators
Presents its
Advanced Attorney-Mediator Training & Annual Meeting**

**“Meet Me in St. Louis
Mediation: Meeting People Where They Are”**

Friday, April 28, 2023 – Saturday, April 29, 2023
The Chase Park Plaza Royal Sonesta Hotel
Starlight Ballroom, 11th floor
212 N. Kingshighway Blvd., St. Louis, MO 63108

Please note that the agenda is listed in Central Time (CT).

Friday, April 28, 2023

12:00-12:30pm Conference Check-In and Registration
Starlight ballroom, 11th floor

Lunch will not be served; Please eat on your own before the meeting begins.

12:30-12:45pm Welcome & Opening Remarks
Allison Ellis, AAM Executive Director, Dallas, TX
Misti Hill Carter, AAM National President-Elect, Bryan, TX
Danielle L. Hargrove, AAM National President, Dallas, TX
Frank Neuner, AAM National Past-President, St. Louis, MO

12:45 – 1:45pm Session 1
**The Prospect Theory: What rules govern people’s choices
among options that involve risk**
David Herzog, Indianapolis, IN
John Trimble, Indianapolis, IN

Most people are risk adverse, and where a gamble may produce a gain or a loss, they tend to take an easy gain rather than risk a loss or pursue a greater gain. This presentation will be an audience participation exploration of how people assess risk and how we mediators can use our knowledge of risk assessment to obtain settlements.

(1.0 CLE hour)

1:45 – 2:45 pm Session 2
**Mediating in the Securities Industries (and sshhh, here’s the
secret, dust off your arbitrator hat)**
David Cosgrove, St. Louis, MO
David Freniere, Wellesley, MA
Kim Kirn, St. Louis, MO

A veteran of the securities industry, along with a former Missouri State Director of Securities, and a FINRA (Financial Industry Regulatory Authority) Mediator and Arbitrator will explain the basics and nuances of resolving disputes across the securities industry. They will discuss FINRA’s dispute resolution programs and some of the unique issues, challenges and opportunities arbitrating or mediating disputes in this arena present.

(1.00 CLE hour)

(Continued on next page)



**Association of Attorney-Mediators
Advanced Attorney-Mediator Training & Annual Meeting
“Meet Me in St. Louis”**

AGENDA CONTINUED

2:45 – 3:00 pm **Break with snack**

3:00 – 4:15pm **Session 3
WSMD (What Should a Mediator Do) – Ethical Dilemmas for
Mediators**

Courtenay Bass, Dallas, TX
Trey Bergman, Houston, TX
Robert W. Berliner Jr., Chicago, IL

Are you ever caught off guard in a mediation by a challenging development or tricky question? Or do you find yourself repeatedly encountering the same pesky issue? In this interactive roundtable discussion, you will get an opportunity to hear how our panel of seasoned mediators deals with various thorny situations.

(1.25 hours, including ethics)

4:15 – 5:30pm **Session 4
Crafting Effective Questions: A Small Group Exercise**

Heather McFarlane, Houston, TX

What makes an effective question? Mediators use questioning to frame issues, spark ideas, empathize, and resolve disputes. In this entirely interactive session, participants will experience the emotional impact of questions and provide feedback on questioning techniques.

(1.25 CLE hours, including .25 ethics)

5:30pm **Closing Remarks and Adjourn to Reception**

Misti Hill Carter, AAM President-Elect, Bryan, TX

5:30 – 6:30pm **Cocktails at The Zodiac Ballroom on the 11th floor**

Enjoy time networking with fellow attendees. Spouses are welcome to join us with prepaid registration.

6:30pm **Dine Around Groups Meet in Hotel Lobby to Depart for Dinner**

(Attendance Optional; See Dine Around sign-up sheets/information cards at check-in table)

(Continued on next page)



**Association of Attorney-Mediators
Advanced Attorney-Mediator Training & Annual Meeting
“Meet Me in St. Louis”**

AGENDA CONTINUED

Saturday, April 29, 2023

Bring your folder and nametag on Saturday morning and please sign the attendance sheet at the registration table for our records.

8:00am **Continental breakfast provided for conference attendees**
Zodiac Ballroom, 11th floor

8:30 – 9:00am **AAM Annual Meeting and Election of Directors**
MEMBER PARTICIPATION IS CRUCIAL. We will be electing two
new Board members and welcoming in our new President and President-
Elect. **All are invited to attend.**

(No CLE Credit)

9:00 – 10:15 am **Session 5**
Bias and Diversity Session
Madison (Matt) Thompson, Boston, MA
David Hoffman, Boston, MA

Session information to be updated.
(1.25 CLE Hours, including elimination of bias and ethics)

10:15-10:30 am **Break** - CLE Sign Up sheets will be available.

Please sign the appropriate state MCLE sheet(s) for MCLE credit. We will need your bar number for our records. Please sign on each state sheet in which you wish to receive credit.

Certificates of Attendance will be available at the end of the day.

10:30 – 11:30 am **Session 6**
Mediate Any Conflict - No Restrictions
Beverly Tarr, Chicago, IL

Mediation is a dispute resolution procedure that can be adapted and utilized in nearly any dispute both inside and outside of your professional spheres. There are however key factors that need to be in place to stand the best chance of a resolution that has longevity. Beverly Tarr will explore both the process requirements and the personal characteristics and style of the mediator to manage most conflicts. She feels the narrative of limiting the scope of mediation needs to be rewritten.

(1.0 CLE hour)

(Continued on next page)



**Association of Attorney-Mediators
Advanced Attorney-Mediator Training & Annual Meeting
“Meet Me in St. Louis”**

AGENDA CONTINUED

11:30 – 12:45 pm Session 7

The Personality Driven Approach to Mediation Workshop

Brian Hewitt, Indianapolis, IN

This presentation and workshop will introduce The Personality Driven Approach to Mediation; the exclusive method speaker Brian Hewitt applies to move participants to settlement. Then attendees will be divided into small groups to apply The Personality Driven Approach in a role-playing setting.

(1.25 CLE hours)

12:45 pm

Closing Remarks and Adjourn

Misti Hill Carter, AAM President, Bryan, TX

Lunch on your own. Thank you for attending!

Please return the yellow evaluation forms to the registration table as you leave. You may recycle the red, green, and yellow cards.

Certificates of Attendance will be available as you exit.

Marketing Segment Attendees will take a short break and return to the meeting room to begin the marketing program at 1:00. A light snack will be provided. **(Lunch will not be served.)** Please evaluate this segment before turning in your yellow evaluation form at the registration table.

1:00 – 1:30 pm Optional Marketing Session

(No CLE hours requested for marketing)