



*The San Diego Chapter of ARMA Proudly Presents:*  
**Electronic Discovery Preparedness**  
**Presented By John Isaza, Esq.**

*Wednesday, March 18, 2009*  
*9:00 AM - 3:30 PM*

*Marriott Courtyard - Kearny Mesa*  
*8651 Spectrum Center Blvd*  
*San Diego, CA 92123*

The San Diego Chapter of ARMA International is pleased to announce a special full day seminar presented by John Isaza, Esq., widely recognized as one of the country's foremost experts on electronic discovery, the revised Federal Rules of Civil Procedure and other RIM issues.

Mr. Isaza is a California-based attorney and partner of Howett Isaza Law Group, LLP, an international records and information management (RIM) consulting practice and law firm. Mr. Isaza has conducted regulatory research and worked in developing records retention programs for countless Fortune 200 companies.

Prior to forming a RIM practice, Mr. Isaza served as General Counsel to a publicly traded medical device manufacturer. Mr. Isaza also has over a decade of experience as a trial lawyer specializing in business, environmental contamination, products liability and construction defects. During that time he also served as Arbitrator for the Los Angeles Superior Court System. Mr. Isaza attended Boston College Law School, where he served as Editor of the International Law Review.

At present, he is an active speaker in the ARMA and AIIM circuits, and he has authored numerous articles on electronic discovery and information management. Mr. Isaza chaired the Chicago Program Committee for ARMA's 2005 international conference; he is a member of ARMA's Electronic Discovery Advisory Group; and, he is past President of the Greater Los Angeles ARMA Chapter. Mr. Isaza is fluent in Spanish, French and proficient in German.

In his spare time, Mr. Isaza is co-authoring a book tentatively entitled "Seven Steps for Implementing Legal Holds," scheduled for release in early 2009 and based in part on his critically acclaimed 2004 and 2007 spoliation and legal hold studies for the ARMA Educational Foundation. John is the 2008 recipient of the prestigious Britt Literary Award of ARMA International.

*Program Session Descriptions:*

**The Revised Federal Rules and Opportunities for Records Managers**

This course will provide not only an update on the status of the revised Federal Rules of Civil Procedure, but it will provide insight into the practical effects the rules play on the daily business operations and preparedness for electronic discovery. Education and understanding of the rules is critical, and this course will present the foundation for

understanding this legislation. Mr. Isaza is one of a handful of attorneys who specializes in records and information managements (RIM) issues, so he will provide RIM specific insight into the revised Federal Rules that few others can offer the RIM profession.

Through this course, participants will:

- Gain an understanding of the key five areas that the revised Federal Rules affect in business and practice;
- Gain an understanding of the critical role of RIM in effectuating the demands of the six key areas of the revised Federal Rules;
- Provide practical tips for businesses to be better prepared under the revised Federal Rules for pending or potential litigation.

**7 Steps for Implementing Legal Holds**

As a follow-up to the earlier session regarding the Federal Rules, and based on Mr. Isaza's much anticipated book, this session will walk the audience through the seven steps needed to issue and implement legal holds and thereby avoid sanctions for spoliation (i.e., destruction of evidence). Mr. Isaza will discuss each step in detail, coupled with recent case law to support many of the steps recommended by the book. At the conclusion of the session, Mr. Isaza will raffle a signed copy of his book to a lucky member of the audience.

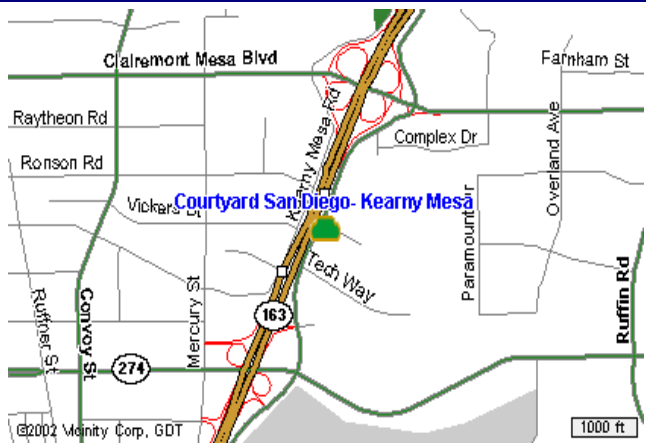
**Mock Trial Prep and Deposition Demonstration**

During this session, Mr. Isaza will walk the audience through the basics of a trial and the effect on RIM. The session will include a brief records manager deposition demonstration. Towards the end of the session, Mr. Isaza will introduce the upcoming mini mock trial and begin Opening Statements.

**Mini Mock Trial**

In this session, Mr. Isaza will continue the mini mock trial, including witness testimony and closing arguments. Members from the audience will be plucked during one of the earlier breaks to volunteer as the witnesses and even the Judge. No legal training required. After the mock trial demonstration, members of the audience will be divided into two groups to deliberate on the outcome of this "spoliation of evidence" mini-trial. The jury results may surprise you!

***Please note that the meeting location is the Marriott Courtyard - Kearny Mesa!***



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**MEETING AGENDA**

<b>9:00 AM</b>	<b>-</b>	<b>9:45 AM</b>	<b>Registration and Continental Breakfast</b>
<b>9:45 AM</b>	<b>-</b>	<b>10:45 AM</b>	<b>Federal Rules</b>
<b>10:45 AM</b>	<b>-</b>	<b>11:00 AM</b>	<b>Refreshments</b>
<b>11:00 AM</b>	<b>-</b>	<b>12:00 PM</b>	<b>Legal Holds</b>
<b>12:00 PM</b>	<b>-</b>	<b>1:00 PM</b>	<b>Lunch</b>
<b>1:00 PM</b>	<b>-</b>	<b>2:00 PM</b>	<b>Trial Prep and Deposition</b>
<b>2:00 PM</b>	<b>-</b>	<b>2:15 PM</b>	<b>Refreshments</b>
<b>2:15 PM</b>	<b>-</b>	<b>3:15 PM</b>	<b>Mini Mock Trial</b>
<b>3:15 PM</b>	<b>-</b>	<b>3:30 PM</b>	<b>Raffle Prizes</b>

**For easy online registration go to <http://www.sandiegoarma.org/programs.html>.** Advanced registration is required **NO LATER** than 3:30 pm, Friday, March 13, 2009. Cancellations later than 48 hours prior to event and No-Shows will be billed to the person registered. **Cash or check payment** (only) is required at registration on day of event. To register by email or for questions send to: [sdarma@sandiegoarma.org](mailto:sdarma@sandiegoarma.org).

**Please pre-register to take advantage of the \$30 savings for Chapter Members!**

(please circle)	Pre-Registered San Diego <u>Chapter Member</u> \$85.00	Walk-in Registration San Diego <u>Chapter Member</u> \$115.00	National ARMA or Non-Member \$115.00	Full-time <u>Students</u> \$65.00	Vegetarian <u>Lunch</u> Yes
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\*\*\*\*\* **Includes Continental Breakfast & Lunch** \*\*\*\*\*

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