

Midwestern Bankruptcy Institute

Consumer

Regional Best Practices for Consumer Professionals

Camille R. Hawk

Walentine O'Toole, LLP | Omaha, Neb.

Joseph C. Jeppson, VI

Jeppson Law Office, LLC | Gladstone, Mo.

Samuel Z. Marks

Marks Law Firm | Des Moines, Iowa

Brent S. Westbrook

Westbrook Law Group, LLC | St. Charles, Mo.



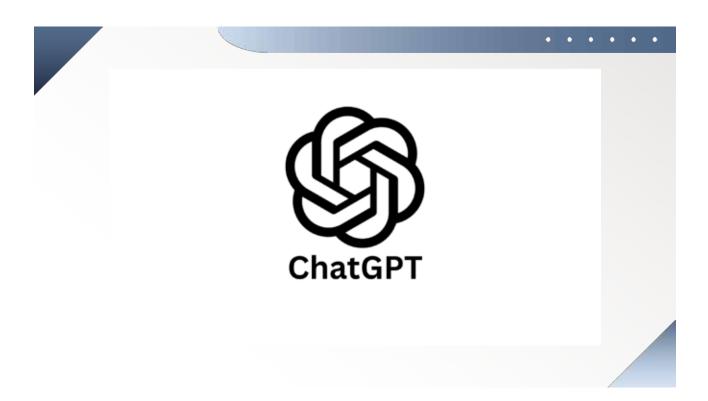


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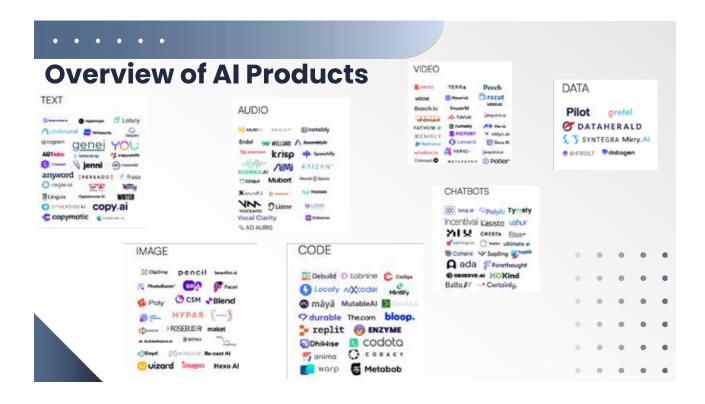
ChatGPT 02 05 7 Steps to a Tech

DocUClipper 03 06 Final Remarks

What is AI?

- → Requires machine learning
 - Not to be confused with automation
- → Al can be used for a variety of tasks:
 - Understanding and translating language
 - Analyzing data
 - Making recommendations
 - Learning from experience
 - Recognizing patterns
 - Solving problems

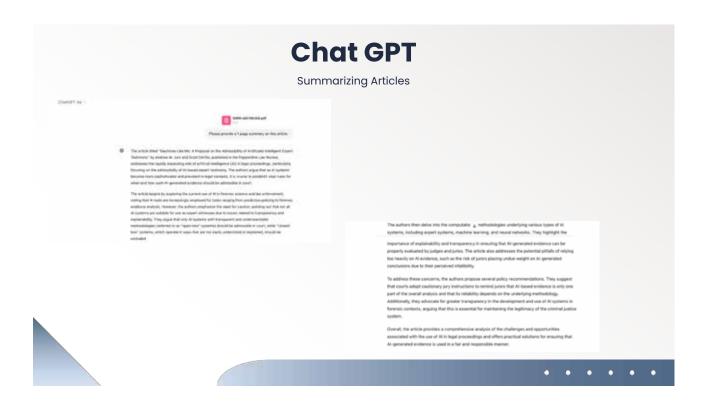
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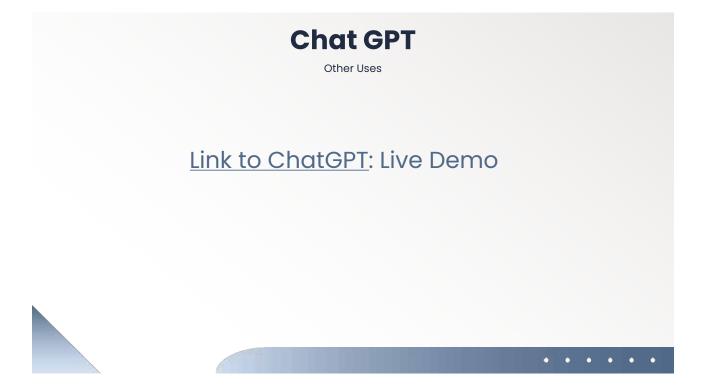
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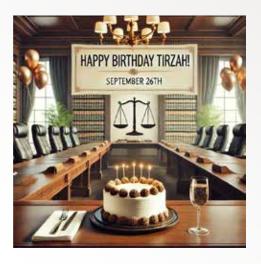




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Chat GPT

Other Uses



DocUClipper

<u>Live Demo</u>

- → Document Automation
- \rightarrow Takes PDFs of bank statements or credit card statements and turns them into a spreadsheet

Lexis Al

Legal Research

- → Similar to ChatGPT
- \rightarrow Can find prior cases or law that focuses on your research question
- $\xrightarrow{}$ Provides links directly to the cases

Summarize Cases

→ With a case name or citation you can get a summary regarding the facts of the case, the opinion provided, and any other necessary information

Live Demo

Draft Documents

- \rightarrow Has the ability to draft briefs, motions, and similar documents
- ightarrow Will need to be refined, but it can be a great starting point

Courtlink

- → Linked directly to Pacer
- → Have the ability to search by client, keyword, attorney, US Trustee, etc.
- \rightarrow Are able to view all of the documents of a case (and download them) at no additional cost

5 Steps to a Legal Tech Audit

Locate your Products

→ Identify what products your firm has access to → Identify what you need your tech to complete in order to make your firm

successful

- **Documents your Findings**
 - → Create a spreadsheet or other document including the following:
 - → Type of tech→ What it is
 - used for
- → Expenses, Etc.

Future Proof your Tech

→ Use this documentation for ongoing legal tech audits

Evaluate Al Products

- \rightarrow Determine, based on this information, which Al tools you might want to use
- \rightarrow Read the terms of service thoroughly and determine:
 - → What does this product do?
 - → How can I use it to improve my

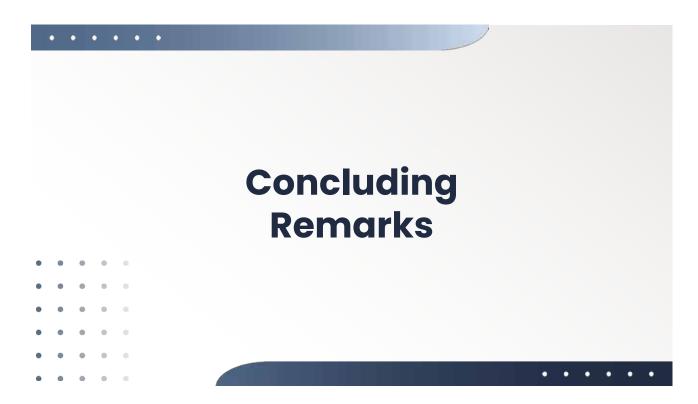
firm?

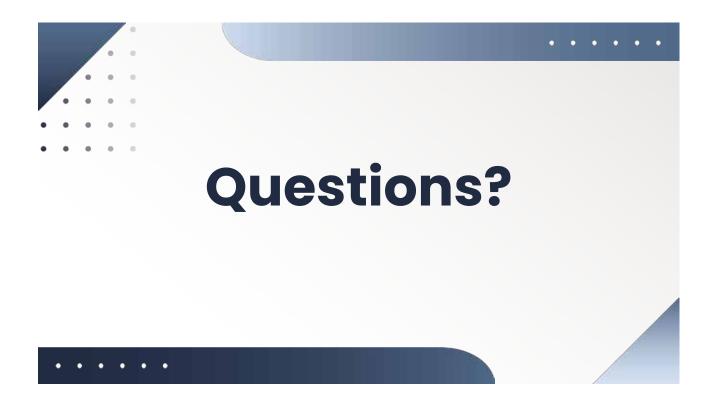
→ What does the product do with your

data?

Analyze and Plan

- → Compare your data and Al products
- → Determine what you need to keep, what you can let go of, and what you may need to purchase





Faculty

Camille R. Hawk is a partner with Walentine O'Toole, LLP in Omaha, Neb., and is one of the region's leading creditors' rights attorneys. She offers financial institutions assistance in the areas of real estate and lending law, and default services including bankruptcy, title issues, foreclosure, loss mitigation, eviction and collections, covering commercial, residential, agricultural and SBA matters. Ms. Hawk has worked with banks for more than 32 years and is licensed in Nebraska and Iowa. She is a regular speaker on topics related to foreclosure, collections and debtor/creditor relations, and she serves on several community boards. Ms. Hawk received her B.A. in sociology in 1990 from Creighton University and her J.D. from Creighton University School of Law in 1994.

Joseph C. Jeppson, VI is is CEO of Jeppson Law Office, LLC in Gladstone, Mo., which he founded in 2011 He has represented debtors in chapter 7 and 13 bankruptcy cases in Missouri and Kansas since 2006. Mr. Jeppson is Board Certified in Consumer Bankruptcy Law by the American Board of Certification and serves on the board of the Kansas City Bankruptcy Bar Association. He also is a frequent speaker on bankruptcy law and related topics. Mr. Jeppson previously worked for two Kansas City bankruptcy firms, rising to the rank of partner. He is an ABI member and currently serves as the president of the Kansas City Bar Association. Mr. Jeppson received his J.D. from the University of Missouri-Columbia School of Law.

Samuel Z. Marks is a sole practitioner with Marks Law Firm in Des Moines, Iowa. He has been practicing law for more than 20 years and has experience with bankruptcies, foreclosure, consumer-protection cases, divorces and estates. Mr. Marks received his B.A. in chemistry in 1997 from the University of Iowa in 1997 and his J.D. in 1999 from Drake University Law School.

Brent S. Westbrook is an attorney with Westbrook Law Group, LLC in St. Charles, Mo., where he focuses almost exclusively on helping individuals and businesses in financial distress. He regularly counsels clients facing foreclosure, repossessions, garnishment and lawsuits. He also assists consumers and businesses with asset protection and exemption-planning. Previously, Mr. Westbrook practiced in Kansas City at Wagoner Maxcy Westbrook, PC after graduating law school in 2006 until the end of 2011. He has represented thousands of clients and is a frequent speaker on bankruptcy law and related topics. Mr. Westbrook received his J.D. from the University of Missouri-Kansas City School of Law, during which time he interned for Hon. Jerry W. Venters.