

THE PROBATE & TRUST SECTION OF
THE LORAIN COUNTY BAR ASSOCIATION
PRESENTS

FALL 2021 PROBATE SEMINAR

4.50 General CLE Hours + 1.50 Professional Conduct Hours

THURSDAY, NOVEMBER 4, 2021

By Zoom

- 8:30-10:00 a.m. **Legislative Update, Case Law Review and Everything Else You Need to Know from the Lorain County Probate Court**
The Honorable James Walther, Lorain County Probate Court
- 10:00-10:15 a.m. Break
- 10:15–11:15 p.m. **Structuring Significance: Leaving a Legacy Through Charitable Planned Giving**
 - Legacy Charitable Strategies (Bequests, Insurance, IRA's, Trusts, etc.)
 - Types of Different Charitable Endowed Funds (Community Responsive, Field of Interest, Designated, DAF, Scholarships)
 - Gift Acceptance Perks and Pitfalls*Laura Malone, Community Foundation of Lorain County*
- 11:15-12:15 p.m. **What Tools Are Available for the Special Needs Client? A review of trusts, STABLE, and more**
Attorney Ethan Welch, Hickman & Lowder
- 12:15-12:45 p.m. **Lunch Break**
- 12:45-2:15 p.m. **Ethics for Probate Attorneys**
 - Diminished Capacity
 - Conflicts
 - Attorneys' Fees*Attorney Richard Koblentz*
- 2:15- 2:30 p.m. Break
- 2:30– 3:30 p.m. **So You Want a Viking Funeral?**
Attorney Meg Pauken, Pauken Legal Services Services

This seminar will be offered on Zoom
Link will be sent one day prior
to the seminar

Cost: LCBA Member Attorney \$150
Non-Member \$175

Mail Payment to: LCBA
627 Broad St.
Elyria, Ohio 44035
(call for credit cards 440-323-8416)

Cancellation Policy: Individuals canceling up to 48 hours prior to the date of the seminar will be issued a credit for attending a future seminar. Those not attending or those leaving early will receive the course materials in full consideration of the seminar fee paid. A \$5 surcharge will be added for all credit/debit card payments.

Annual Probate Law Seminar

NAME: _____

COMPANY: _____

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