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For More Information or to Order

phone: (800) 232-7124
(614) 487-8585



Ohio State Bar Association
P.O. Box 16562
Columbus, OH 43216-6562



Drafting Wills and Trusts

6.0 Total CLE Hours

6.0 General
0.0 Prof
0.0 Ethics
0.0 S.A.

Estate Planning, Trust and Probate Law Basic

Wednesday, June 15, 2005

COLUMBUS

Ohio State Bar Association
1700 Lake Shore Drive
off W. 5th Ave., just West. of Rt. 3
(614) 487-8585

Wednesday, June 22, 2005

CLEVELAND

The Forum
ONE Cleveland Center
E. 9th St. & St. Clair, use 9th St. exit off all major highways
(216) 241-6338

Course Topics:

- Specific techniques to assure that you can properly prepare each of the most important kinds of will and trust documents
- Guidelines, sample provisions and drafting techniques, plus explanations as to why each document must be drafted in a certain way
- Critical steps in the drafting process



6.0
CLE Hours **Drafting Wills and Trusts** Registration

Course 05-34

Agenda

8:00am	Registration		
8:30	Overall Process		Columbus: Jay E. Michael; Attorney at Law; Columbus
	<ul style="list-style-type: none"> · Role of the Attorney · Interviewing the Client · Conflicts of Interest · Client Competency · Organization of File · Fees · Legal Ethics 	12:15	Cleveland: James S. Aussem; Brouse McDowell LPA; Cleveland
			Lunch (on your own)
		1:15	Designing the Trust
			<ul style="list-style-type: none"> · Establishment of Trust · Disability of Grantor · Additions · Revocation and Amendment · Powers of Trustee · Resignation of Trustee · Selecting the Trust Form · Acceptance of Trust · Spray, Discretionary or Sprinkle Provisions · Spendthrift Provisions
	Columbus: Robert V. Morris; Metcalf Duren Morris Starkey & Waid; Dublin		Columbus and Cleveland:
	Cleveland: J. Donald Cairns; Spieth Bell McCurdy & Newell Co., LPA; Cleveland		David E. Kauffman; Betzel & Kaufman Co., LPA; Pickerington
9:30	Designing the Will-Where to Start		
	<ul style="list-style-type: none"> · Opening Paragraphs · Payment of Debts, Expenses and Taxes · Tangible Personal Property and Residences · Nomination of and Powers of Fiduciaries · Testimonium · Attestation 	2:45	Break
	Columbus: Tristan A. McCormick; Gamble Hartshorn Johnson LLC; Columbus		
	Cleveland: Erica E. McGregor; Spieth Bell McCurdy & Newell Co., LPA; Cleveland	3:00	Drafting for Specialized Circumstances
			<ul style="list-style-type: none"> · Real Estate · Exculpatory Clauses · Gifts to Employees · Withdrawal Right ("Crummey") Notices · Provisions for Disabled Persons · Pets
10:30	Break		Cleveland: Jennifer Savage; Thompson Hine LLP; Cleveland
10:45	Designing the Will-Where to Start continue		Columbus: William S. Fein; Thompson Hine LLP; Columbus
11:15	Alternative and Supplementary Will Provisions		
	<ul style="list-style-type: none"> · Common Disasters · Disinheritance · Pour Over to Revocable or Living Trust · Contingency Clauses · No Contest Provisions · Guardians · Powers of Appointment · Legal Life Estates · Trusts · Legal Ethics 	4:00pm	Program Concludes

Registrant

Ohio Atty # _____
 Admission Date: ____ / ____ / ____
 Name: _____
 Firm: _____
 Address: _____
 City, State, Zip: _____
 Phone: (____) ____ - ____ * Fax: (____) ____ - ____
 *Email: _____ @ _____
 New Address *May be used for future seminar notification
 Campaign Code: #48

Tuition & Location

<input type="checkbox"/> Columbus	<input type="checkbox"/> Cleveland
Wednesday, June 15, 2005	Wednesday, June 22, 2005
	Member Non-Member
Pre-Registration:	<input type="checkbox"/> \$195 <input type="checkbox"/> \$245
Walk-in Registration:	<input type="checkbox"/> \$220 <input type="checkbox"/> \$270
Gov't Attorneys:	<input type="checkbox"/> \$165 <input type="checkbox"/> \$210
New Lawyers: (1-12 months in practice)	<input type="checkbox"/> \$100 <input type="checkbox"/> \$125

Group Discount: 3 or more from the same firm or office registering for this program receive \$25 off each registration. (New lawyers are excluded. Registrations must be processed at the same time.)

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Book Order Only

I am unable to attend. Please reserve a copy of Vol. 05-34 and mail it to me at the conclusion of this seminar. Enclosed is a payment of \$45 (includes 6.75% sales tax and \$5 shipping).

Cancellation Policy: Cancellations received by 5:00 p.m. the business day prior to the seminar will be refunded less a \$25.00 office fee. Those not attending will receive the course materials in full consideration of tuition paid.

Weapons Policy: The Ohio State Bar Association prohibits the possession, transport and storage of all Weapons on Association property and in any Association programs. To review our Weapon-Free Policy, visit the OSBA Web site.

Mail

OSBA CLE Institute
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Door

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