

Program description

You will return to the office knowing:

- Specific techniques for properly preparing the most important kinds of will and trust documents; and
- Critical steps in the drafting process.

Unable to attend?

This CLE seminar is also available in these formats:

Live Webcast – You can view this seminar via the Internet for self-study credit as it takes place at the OSBA. The Supreme Court of Ohio allows you to earn six hours per reporting period through self-study. To register, go to www.ohioabar.org/webcasts.

DVD – You may purchase the DVD and course book for \$100 (no CLE credit). To order, please contact Member Services at 800-232-7124 or 614-487-8585 (credit card) or check the DVD order box on the registration form.

Book - Quality decisions depend on quality information. If you cannot attend this program but want to read about the information presented, order a copy of this course manual. To order, complete the registration form and check the book only check box.




P.O. Box 16562
Columbus, OH 43216-6562

Return Service Requested



Drafting Wills and Trusts



have read the

Signature *Deeg*

Address _____

State _____

February 20

Akron Dayton
Cleveland Perrysburg
Columbus Wooster

Live Satellite Broadcast

Drafting Wills and Trusts



DATE AND LOCATIONS:

February 20

Akron
Cleveland
Columbus (live)
Dayton
Perrysburg
Wooster

HOURS:

6.0 CLE hours, including 1.0 Ethics,
6.0 New Lawyer Training hours





Schedule

8:00 Registration

8:30 Designing the Will

- Role of the attorney
- Interviewing the client
- Conflicts of interest
- Client competency
- Organization of files
- Fees
- Opening paragraphs
- Payment of debts, expenses and taxes
- Tangible personal property and residences
- Nomination and powers of fiduciaries

Robert V. Morris; Morris Starkey & Waid, LLC; Dublin

10:00 Break

10:15 Alternative and Supplementary Will Provisions

- Common disaster
- Disinheritance
- Pour over to revocable or living trust
- Contingency clauses
- No contest provisions
- Guardians
- Powers of appointment
- Legal life estates
- Trusts

James S. Aussem; Weston Hurd LLP; Cleveland

11:15 Miscellaneous Issues

- Health care power of attorney
- General durable POA
- Living wills
- Disposal of body parts
- Retirement accounts

Ralph E. Lehman; OSBA Board Certified in Estate Planning, Trust and Probate Law; Logee Hostetler Stutman & Lehman; Wooster

12:15 Lunch (on your own)

1:15 Ethical Issues in Estate Planning

Jay E. Michael; OSBA Board Certified in Estate Planning, Trust and Probate Law; Attorney at Law; Columbus

2:15 Break

2:30 Designing the Trust

- 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

David E. Kauffman; OSBA Board Certified in Estate Planning, Trust and Probate Law; Schottenstein Zox & Dunn Co. LPA; Columbus

4:00 Program Concludes

Ohio attorney number: _____

Admission date: _____

Name: _____

Firm: _____

Address: _____

City, state, zip: _____

Phone: _____ Fax: _____

E-mail: _____

New address

Tuition and location

Please check one:

<input type="checkbox"/> Akron	<input type="checkbox"/> Cleveland
<input type="checkbox"/> Columbus	<input type="checkbox"/> Dayton
<input type="checkbox"/> Perrysburg	<input type="checkbox"/> Wooster

	Member	Nonmember
Pre-registration:	<input type="checkbox"/> \$210	<input type="checkbox"/> \$263
Walk-in registration:	<input type="checkbox"/> \$235	<input type="checkbox"/> \$288
Gov't attorneys:	<input type="checkbox"/> \$179	<input type="checkbox"/> \$223
New lawyers:	<input type="checkbox"/> \$105	<input type="checkbox"/> \$132

(One to 12 months in practice)

Group discount: Three 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.) Note: Nonmembers may join the OSBA and save on all future OSBA CLE seminars. Contact the OSBA at (800) 232-7124 for an application. OSBA associate legal assistant members may attend at the OSBA member rate.

Form of payment

Enclosed is a check for \$ _____

Mastercard Visa American Express

Account number: _____

Expiration date: _____

Signature: _____

DVD/Book order

I am unable to attend:

DVD: Please reserve a copy of Vol. 09-034 DVD and course book. Enclosed is a payment of \$100 (includes 6.75 percent sales tax and \$5 shipping).

BOOK ONLY: Please reserve a copy of Vol. 09-034 (book). Enclosed is a payment of \$50 (includes 6.75 percent sales tax and \$5 shipping).

Cancellation policy: Cancellations received by 5 p.m. the business day prior to the seminar will be refunded less a \$25 office fee. Those not attending will receive the course materials in full consideration of tuition paid.

Date and locations

February 20, 2009

Akron: John S. Knight Center, 77 E. Mill St.

Cleveland: The Forum, One Cleveland Center, East 9th Street and St. Clair Ave.

Columbus: Ohio State Bar Association, 1700 Lake Shore Dr.

Dayton: Sinclair Community College, 444 West 3rd St. (Third and Perry), Building 12

Perrysburg: Holiday Inn French Quarter, 10630 Fremont Pike

Wooster: OSU-OARDC, Shisler Conference Center, 1680 Madison Ave.

To register

Mail: OSBA CLE, P.O. Box 16562, Columbus, OH 43216-6562

Phone: (800) 232-7124 or (614) 487-8585 (credit card only)

Fax: (614) 487-8808 (credit card only)

Online: www.ohioabar.org

Door: Call in advance to confirm date, time, location and space availability.

