# 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.ohiobar.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.





Return Service Requested

Columbus, OH 43216-6562

Live Satellite Broadcast

# Drafting Wills and



## DATE AND LOCATIONS:

February 20

Akron

Cleveland

Columbus (live)

Dayton

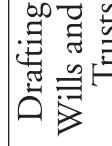
Perrysburg

Wooster

## Hours:

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







Dayton Perrysburg Wooster February 20 Columbus Cleveland

# Schedule

#### Registration 8:00

#### Designing the Will 8:30

- Role of the attorney
- Opening paragraphs
- Interviewing the client
- Payment of debts, expenses and taxes
- Conflicts of interest Client competency
- Tangible personal property and residences
- Organization of files • Fees
- 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
- No contest provisions
- Disinheritance
- Guardians

Trusts

- Pour over to revocable or living trust
- Powers of appointment
- Legal life estates
- Contingency clauses
- James S. Aussem; Weston Hurd LLP; Cleveland

#### 11:15 Miscellaneous Issues

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

#### Designing the Trust 2:30

- 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

## 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

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

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

Online: www.ohiobar.org

Door: Call in advance to confirm date, time, location

and space availability.



<u>Registratio</u>	[]	09-034
Ohio attorney number:		
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Tuition and l	ocation	☐ New address
Please check one:	☐ Akron ☐ Columbus ☐ Perrysburg	☐ Cleveland ☐ Dayton ☐ Wooster
	Member	Nonmember
Pre-registration:	□ \$210	□ \$263
Walk-in registration:	□ \$235	□ \$288
Gov't attorneys:  New lawyers: (One to 12 months in practice)	□ \$179 □ \$105	□ \$223 □ \$132
Group discount: Three or m this program receive \$25 off Registrations must be proces may join the OSBA and say the OSBA at (800) 232-71: assistant members may atte	each registration. (New ssed at the same time.) I we on all future OSBA 24 for an application. (	v lawyers are excluded. Note: Nonmembers CLE seminars. Contact OSBA associate legal
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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.