
# Estate Planning, Trust and Probate Bundle

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**15 hours**

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# OnDemand Bundle

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This OnDemand Bundle tailors 15 Ohio-specific self-study CLE credits to your practice needs. Enjoy the convenience of online CLE featuring the best speakers covering essential topics for Ohio lawyers now for **$500 off the original member price**.

**Credits:** 1.0 hour, unless otherwise specified. All online CLE courses must be completed by Dec. 31, 2019, 11:59 p.m. All speakers and firms listed below reflect their affiliation as of the date of course production. **Tuition:** Member $159/Nonmember $199

P = Approved for Professional Conduct   S = Approved for Specialization Certification

## Afterlife on the Cloud: Probate Planning & Digital Assets S

**Approved for Estate Planning, Trust and Probate Law Certification**

Dealing with the physical objects left behind after someone's death is something people have been doing for a long time and is fairly straightforward. But what about digital assets – email accounts, Facebook accounts, online bank accounts, automatic billing, and so forth? Find out how to create a plan to take care of such assets so that they can be dealt with easily and effectively after the owner's death.

*David Lenz; Schneider Smeltz Spieth Bell, LLP; Cleveland*

## Alternatives to Bankruptcy

Bankruptcy may not always be the answer to a client's debt relief. This course is designed to provide practitioners with alternatives to bankruptcy, including debt settlements, deeds in lieu of foreclosure, short sales, and state court receiverships. Subjects also to be addressed include asset protection outside of bankruptcy, tax ramifications of debt settlements, fair debt collection, and statutes of limitation on debt collection.

*Robert Barr; Koehler Fitzgerald LLC; Cleveland*

## An Ohio Family Trust Company – A Case Study in Family Business Shareholder Transition S

**Approved for Estate Planning, Trust and Probate Law Certification**

As family businesses grapple with succession planning in the operational arena of a family business, they also need to be considering transition planning for the shares of the family business. Families wishing to keep the family business 'in the family' will want to understand the Ohio Family Trust Company Act and the opportunity it presents here in Ohio as part of a plan to move shares and economic benefit to succeeding generations. This Webcast will walk through the statutory requirements of an Ohio Family Trust Company while applying it to the facts of a family owned business for a "real life" application.

*Cynthia Steeb; CLS Consulting LLC; Cleveland*

## An Update on the Tax Cuts and Jobs Act S

**Approved for Federal Tax Law Certification**

Overview and updates on the Tax Cuts and Jobs Act passed in 2017. Presenters will cover effects for individuals and business, with emphasis on the new Qualified Business Deduction under Code Section 199A.

*Justin T. Linscott, CPA, CGMA; Holbrook & Manter, CPAs; Columbus*
*Brian Ravencraft, CPA, CGMA; Holbrook & Manter, CPAs; Columbus*

## Effective and Strategic Use of Appraisals in Transactional Matters S

**Approved for Estate Planning, Trust and Probate Law Certification**

Learn how appraisers and appraisal documents can be used effectively in transactional matters, such as business contracts or complex estates, and identify subtleties that will make you a better consumer of the information contained in appraisals.

*Dr. John A. Kilpatrick, Ph.D, MAI, FRICS; Chairman and Co-Managing Director, Greenfield Advisors; Seattle, WA*

## Estate Planning with the Low Income Client S

**Approved for Estate Planning, Trust and Probate Law Certification**

This course provides an entry-level overview of estate planning with low-income individuals. It is designed to prepare a volunteer attorney to evaluate the estate planning needs of a low income person and answer client's most frequently asked questions. Topics covered include evaluating competency, advanced directives, last will and testament, and property transfers that avoid probate.

*Jennifer van Dulmen-Krantz; Community Legal Aid Services, Inc.; Akron*
*Mary Ellen Leslie; Attorney at Law; New Albany*

## Healthcare Decisions in Retirement "Understanding Medicare" S

**Approved for Estate Planning, Trust and Probate Law Certification**

Topics of this presentation will include: understanding and estimating healthcare costs in retirement, what Medicare covers, what it doesn't, and what it costs. We will also cover all the components of Medicare (Parts A, B, C and D), and how and when to file for benefits.

*Matt Romeo, CFP, AIF; Everhart Advisors; Dublin*

## Intellectual Disorder and the Determination of Disability -Understanding the Framework in Ohio

This presentation will examine and compare various statutes from the Ohio Revised Code and the Code of Federal Regulations dealing with the subject of intellectual or developmental disabilities. The definitions and criteria for identifying intellectual disorder are remarkably similar, but somehow the same intellectually disabled individual can qualify for assistance from the State of Ohio, through the Ohio Department of Developmental Disabilities (DODD), but still be denied for Social Security Disability benefits by Opportunities for Ohioans with Disabilities (OOD). Is such an outcome rational and justifiable?

*Philip Gauer; Philip J Gauer, Atty at Law; Columbus*

## IOLTA School P

Learn all you need to know to comply with the disciplinary rules on Client Trust and IOLTA accounts in just one hour.

*Philip King; Law Office of Philip A. King LLC; Columbus*

## Managing the Difficult Client P

Learn tools for preventing and handling difficult clients: identify warning signs, learn common tactics, and understand what you can do once you have a difficult client. Also, ensure that you stay within the ethical guidelines by reviewing the applicable Rules of Professional Conduct.

*J. William Duning, Esq.; Gray & Duning; Lebanon*

## Preparing for the New Frontier in Trusts & Estates: Blockchain & Cryptocurrency S

**Approved for Estate Planning, Trust and Probate Law Certification**

Tune in for an overview of blockchain and cryptocurrency, beginning with a technical background of this technology and a primer on several of the most popular uses, including currencies. Next, we will cover some of the tax implications, including taxes related to earning cryptocurrencies, investing in them, and using them in commerce. Finally, we will discuss how to incorporate these assets into a proper estate plan and how to administer them as a part of a trust or estate. *Scott Duffy; Blockchain Business Consulting LLC; Columbus*
*Melanie Howell; Rea & Assoc. Inc. CPA's; Columbus*
*Geoffrey Kunkler; Carlile Patchen & Murphy LLP; Columbus*

## Probate Litigation from a Plaintiff's Perspective: 2019 Updates S

**Approved for Estate Planning, Trust and Probate Law Certification**

With an aging population that has accumulated great wealth, Ohio's probate courts have seen an increased amount of adversary actions. This program will provide an update on new cases and recent hot topics, and offer practice tips for plaintiffs in contested probate matters.

*John P. Lewandowski, Esq.; Heban, Murphree & Lewandowski, LLC; Rossford*

## Social Security Claiming Strategies S

**Approved for Elder Law Certification**

A discussion of Social Security strategies that includes the following topics: Social Security Facts, Social Security vocabulary, overall claiming strategy, Social Security absolutes, qualifying for Social Security benefits, types of benefits, factors to consider in designing a claiming strategy, full retirement age, delayed retirement credits, claim early vs later, annual earnings limitations, worker benefits, deemed filing, spousal benefits, divorced spousal benefits, children's benefits, family maximum, survivor benefits, benefits before age 62, restricted application, voluntary suspension of benefits, retroactive benefits, windfall elimination provision, government pension offset, do over rule, taxability of benefits, and IRMMA.

*Thomas Hager, CPA, CGMA, NSSA; Apple Growth Partners; Cleveland*

## Steps in Questioning Capacity versus Competency S

**Approved for Elder Law Certification**

Mental capacity is complex, multidimensional, and can be affected by many factors. Adults can be mentally incapacitated for a multitude of reasons, including cognitive impairment, psychosis, alcoholism, and severe developmental disabilities. Professionals that erroneously assume capacity on behalf of an adult can cause significant harm to the adult. Professionals serving vulnerable adults carry a significant responsibility to avoid premature and unsupported conclusions regarding the adult's cognitive abilities. Knowing when to seek formal evaluations based on professional observations and collateral data is critical. In this workshop, attendees will obtain detailed information on the factors that influence capacity and examine practical screening tools to effectively conduct cognitive screenings to avoid inaccurate assumptions regarding the adult's abilities.

*Sylvia Pla-Raith, Director, Elder Justice Unit - Consumer Protection Section; Ohio Attorney General Dave Yost; Columbus*
*April Wehrle, Senior Elder Services Coordinator, Elder Justice Unit - Consumer Protection Section; Ohio Attorney General Dave Yost; Columbus*

## Substance Abuse & Professional Ethics P

Substance abuse is an ongoing problem for the general populace and the legal community. This seminar will address the types of toxic substances lawyers and others abuse, including alcohol, opiates, food, and illicit drugs, and their side effects. Common causes as to why attorneys may abuse these substances will be presented, including stress, habituation, and self-medication. The seminar concludes with techniques to recognize impending abuse, along with intervention strategies.

*Dr. Kenneth Manges, Ph.D.; Forensic Psychologist, Vocational Services and Clinical Psychology; Cincinnati*

*NOTE: Gov. Bar Rule X limits 12 hours of self-study CLE credit per reporting period. Any self-study hours completed over 12 hours are for educational purposes only and not for additional CLE credit.*