

SCHENECTADY COUNTY BAR ASSOCIATION
Trusts and Estates / Elder Law CLE Seminar



Thursday, March 15, 2018

Note location: Terrace at Water's Edge Lighthouse

CLE credit: 7.5 hours including 6.5 in Areas of Professional Practice and 1.0 Professional Ethics

- 8:00-8:30 a.m. Registration and Continental Breakfast
- 8:30-8:40 a.m. Welcoming / Opening Remarks (*Lauren E. Sharkey*)
- 8:40-9:30 a.m. Medicaid Update and Spend-Down Techniques (*Deborah A. Slezak*)
- 9:30-10:45 a.m. Revocable Trusts to Avoid Probate (*Glenn Witecki*)
- 10:45-11:00 a.m. Break - Sponsored by Bonadio Group and Watson Peterson
- 11:00-11:50 a.m. View From the Bench (*Hon. Vincent Versaci*)
- 11:50 a.m.-1:00 p.m. Lunch - Sponsored by Witecki Builders
- 1:00-1:50 p.m. Breakout Session (*choose one topic*)
A. Real Property and Tax Issues for the Elder Law Attorney (*Ann M. Sharpe*)
B. Preparing for Estate Administration (*William Pfeiffer*)
C. Home Care 101 (*Michael Dezik*)
D. 17A Guardianship Procedure and Legislative Update (*Lauren E. Sharkey*)
- 1:50-2:40 p.m. Breakout Session (*choose one topic*)
A. Real Property and Tax Issues for the Elder Law Attorney (*Ann M. Sharpe*)
B. Preparing for Estate Administration (*William Pfeiffer*)
C. Home Care 101 (*Michael Dezik*)
D. 17A Guardianship Procedure and Legislative Update (*Lauren E. Sharkey*)
- 2:40-2:55 p.m. Break - Sponsored by NYSARC Trust Services
- 2:55-3:45 p.m. Tax Update for Estate Planning Attorneys: What You Need to Know for 2018 (*Martin S. Finn*)
- 3:45-4:35 p.m. Escrow Accounts (*Peter V. Coffey*)

REGISTRATION—SCBA Trusts and Estates / Elder Law CLE—March 15, 2018

New location: Terrace at Water's Edge Lighthouse, 2 Freeman's Bridge Road, Glenville

Cost: \$135 for SCBA members; \$150 for non-SCBA attendees - Includes continental breakfast, lunch

RSVP: By March 5 and payable to SCBA (PO Box 1728, Schenectady NY 12301-1728)

Cancellations: Refund requests must be made 3 or more days in advance of the seminar

Scholarships: Available based on financial need - contact info@schenectadycountybar.org

Name: _____

Email: _____

Address: _____

City: _____ State: _____ Zip: _____