

Course Planners

Robert M. Brucken, Esq.; Baker Hostetler; Cleveland

Joanne E. Hindel, Esq.; Fifth Third Bank; Cleveland

William J. McGraw, Esq.; Dungan & LeFevre Co. LPA; Troy

SAVE THE DATE



**CONVENTION 2012
CINCINNATI
MAY 2-4, 2012**

 Ohio State Bar Association

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Columbus, OH 43216-6562

Return Service Requested

Updating the Ohio Trust Code

March 1
Columbus
(Live and via Webcast)

Live via Simulcast to:
Akron
Cleveland
Fairfield
Perrysburg

Unable to attend?

This CLE program is also available in these formats:

Book: If you cannot attend this program but want to order a copy of this course book, please contact Member Services at (800) 232-7124 or (614) 487-8585.

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) Available 4-6 weeks from date of program.

Live Webcast: You can view this program 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.



Ohio State Bar Association

Updating the Ohio Trust Code

Attend this seminar to learn about the updates to the Ohio Trust Code as enacted by SB 117 and the effect it has on your practice.

Bonus: Each attendee will receive a copy of the updated *Ohio Trust Code* book in addition to the regular course book.

March 1
Columbus

(Live and via Webcast)

Live via Simulcast to:

Akron
Cleveland
Fairfield
Perrysburg

5.5 total
CLE hours



5.5 Specialization hours
toward estate planning, trust
and probate certification

8:00 Registration

9:00 Modification and Termination of Trusts

A six-person panel will review up to a dozen fact situations where modification or termination of an irrevocable trust is desired, each person responding from his or her assigned perspective. The six perspectives are disclaimer, decanting, PSAs, non-statutory agreements, PSAs blessed by simple court orders, and full court proceeding and orders. Three of these six topics have been changed substantially by SB 117.

Disclaimer: Kevin G. Robertson, Esq.; Baker Hostetler; Cleveland

Decanting: M. Patricia Culler, Esq.; Hahn Loeser & Parks LLP; Cleveland
PSA: Joanne E. Hindel, Esq.; Fifth Third Bank; Cleveland

Non-statutory agreement: Alan S. Acker, Esq.; Carlile Patchen & Murphy LLP; Columbus

PSA blessed by simple court order: Robert M. Brucken, Esq.; Baker Hostetler; Cleveland

Full court proceeding and order: William J. McGraw, Esq.; Dungan & LeFevre Co. LPA; Troy

11:00 Break

11:15 Ohio Uniform Power of Attorney Act

Richard E. Davis, Esq.; Krugliak Wilkins Griffiths & Dougherty; Canton

A review of the Ohio Uniform Power of Attorney Act as enacted by SB 117 and how to use the new forms.

12:15 Lunch

1:15 Trust Anti-Lapse Statute

John D. Clark, Esq.; Krugliak Wilkins Griffiths & Dougherty; Canton

A review of the Trust Anti-Lapse Statute as enacted by SB 117 and how it applies to future interests as well as present interests.

1:45 Trustee Duties in ILITS

Robert B. Barnett, Esq.; Carlile Patchen & Murphy LLP; Columbus

Review of the irrevocable life insurance trusts (ILITS) as enacted by SB 117 and how it affects settlors and trustees.

2:15 Titling Assets in Trust

Thomas Pillari, Esq.; Wickens Herzer Panza Cook & Batista Co.; Avon

Review of titling assets in trust, including how to cure presently defective titles.

2:45 Break

3:00 Construction of Tax Formula Clauses

J. Michael Cooney, Esq.; Dinsmore & Shohl LLP; Cincinnati
Review of construction of tax formula clauses as enacted by SB 117 and how to proceed as death taxes are repealed or revived.

3:30 Probate Code Modernization

Lawrence A. Belskis, Esq.; Wiles Boyles Burkholder & Bringardner; Columbus

A review of substantive changes in SB 124.

4:00 Program Concludes

Date and Locations

March 1, 2012

Akron

John S. Knight Center, 77 E. Mill St., 44308

Cleveland

The Ritz-Carlton, 1515 W. 3rd St., 44113

Columbus

Ohio State Bar Association, 1700 Lake Shore Dr., 43204

Fairfield

Receptions Conference Center North, 5975 Boymel Dr., 45014

Perrysburg

The Hilton Garden Inn, 6165 Levis Commons Blvd., 43551

To Register

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

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

Fax: (614) 487-8808

Online: www.ohioabar.org

Door: Call in advance to confirm date, time, location and space availability. If you require special accommodations, please call OSBA member services at (800) 232-7124.

Payment must accompany registration.

Webcast

Registration online ONLY

www.ohioabar.org/webcasts to register

(for self-study CLE credit)

To Save

Group Discount: Three or more from the same firm or office registering for this program receive \$25 off each registration. (Registrations must be submitted at the same time.)

Membership: OSBA members save an average of 25 percent on CLE. If you are a nonmember, join at www.ohioabar.org/join and start saving today!

Member	Nonmember
\$240	\$293

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

OHIO ATTORNEY NUMBER		ADMISSION DATE
NAME		
FIRM		
ADDRESS		
CITY	STATE	ZIP
PHONE		FAX
E-MAIL		<input type="checkbox"/> NEW ADDRESS

Select Location

- March 1 Akron Cleveland
 Columbus Fairfield Perrysburg

Select Tuition

	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"/> \$263

Not Attending? Order the DVD/Book, Course Book or Bonus Book

- \$100 DVD/Book
 \$55 Course Book Only
 \$75 Bonus Book Only

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SIGNATURE