Event Title:

Trusts and Estates Law for Paralegals

Event Date and Time:

April 30, 2024 -- 10:00 AM EDT - 05:00 PM EDT

Event Agenda:

All times are shown in Eastern time.

I. **Legal Terms and Concepts, Laws of Intestacy, and Useful Practice Resources**
   10:00 - 10:30, George S. Peek
II. **Legal Research and Case Intake Tips From the Pros**
   10:30 - 11:00, George S. Peek
III. **Wills, Trusts, and Other Critical Estate Planning Documents**
   11:00 - 11:30, George S. Peek
   A. POAs(Powers of Attorney)
   B. Adult Guardianships/Conservatorships and Supported Decision-Making Agreements
   C. Healthcare Decision-Making Documents
   D. Wills, Testamentary Trusts
IV. **Types of Trusts, Their Uses, and Basic Provisions**
   11:45 - 12:15, William R. Hayes
V. **Asset Valuation and Inventory**
   12:15 - 12:45, Christin A. Miyahira
VI. **Accounting and Recordkeeping: Tips From Experienced Paralegals**
   12:45 - 1:15, Christin A. Miyahira
   A. Ensuring Proper Titling of Assets
   B. Funding Trusts
   C. Properly Recording Gifts and Transfers
VII. **Probate Process Assistance and Case Management**
   1:45 - 2:30, Christin A. Miyahira
   A. Estate Administration Tasks and Timeline
   B. Tips for Maintaining Deadlines
   C. Document Management
VIII. **Communication With Fiduciaries, Beneficiaries, and Third Parties**
   2:30 - 3:15, Aubrey H. Ducker Jr.
   A. Probate Notices
   B. Creditor Communications
   C. Notices of Proposed Action
   D. Obtaining Informed Consent
   E. Fielding Questions
IX. **Basic Preparation of Tax Documents for the Decedent, Trusts, and Estates**
   3:30 - 4:00, Karen Conn Mavros
X. **Paralegal Ethics Issues in Trusts and Estates Practice**
   4:00 - 5:00, Aubrey H. Ducker Jr.
   A. Preventing UPL (Unauthorized Practice of Law)
   B. Privilege and Confidentiality

Duty of Competence

D. Preventing Conflicts of Interest

Event Description:

Paralegals play a pivotal role in helping attorneys provide critical legal services to clients in matters of trusts and estates, from drafting simple POAs and recording transfers to valuation and probate of the decedent's assets and the settling of the estate. This broad -based overview offers foundational knowledge to help accomplish the tasks paralegals typically handle in this area of law. Build your skills - register today!

- Get a solid grasp of fundamental legal terminology and concepts.
- Understand the laws of intestacy and their implications.
- Explore typical types of trusts and their applications.
- Ensure you can accurately assess the estate's value.
- Learn how to assist in probate petition preparation and filing.
- Get tips for effective communication with various stakeholders.
- Clarify how to prevent unauthorized practice of law (UPL) in estate planning practice.

Who Should Attend:

This **intermediate level estate planning kit** is designed to help you build your essential skills. Those who should attend include:

- Paralegals
- Legal Technicians
- Legal Assistants
- Legal Support Staff

Event Bio:

Aubrey H. Ducker Jr. is a member in the Orlando office of CPLS, P.A., in the firm's family and elder law practice groups. His family law practice includes traditional family law representation in the areas of divorce and all issues incidental there to, such as parenting issues, alimony, child support, property distribution and related issues. Mr. Ducker's practice also introduces new strategies, including collaborative divorce, mediation and private trials, to assure his client's concerns are protected and secured. He has served as a guardian ad litem in more than 130 cases in both terminations of parental rights cases and as a private guardian ad litem in divorce proceedings. Mr. Ducker earned his associate's degree (treasurer, Phi Theta Kappa Honor Society, Valencia East Campus) from Valencia Community College, his B.A. degree (president of Society Professional Journalists, UCF) from the University of Central Florida and his J.D. degree (president, Law College Council, 1998-1999) from the University of Florida's Frederic G. Levin College of Law program. His efforts on behalf of Florida's families, children and mature population extends beyond his office and the courthouse, and includes having served as a chair of the Elder Law Committee of the Orange County Bar Association. Mr. Ducker has been recognized by his peers, as he has received the Pro -Bono Champion Award of Excellence.

William R. Hayes is a partner in the law firm of Hayes & Wilson, PLLC. He is a frequent speaker on estate planning, wills and trusts, probate, charitable gifting, disability planning, elder law, and Medicaid. Mr. Hayes has served the Houston Bar Association as co-chair of the Elder Law Committee, and chair of the Fee Dispute Committee for which he was honored with the HBA Presidents Award. He is board-certified in estate planning and probate by the Texas Board of Legal Specialization. Mr. Hayes is a member of the State Bar of Texas, Houston Estate and Financial Forum, Houston Business and Estate Planning Council, Attorneys in Tax and Probate, and Disability and Elder Law Attorneys Association. He earned his B.B.A. and J.D. degrees from the Southern Methodist University.

Karen Conn Mavros is an attorney with the law firm of Heckscher Teillon Terrill & Sager, PC. She focuses her practice on trust and estate planning and administration. Ms. Conn Mavros earned her B.A. degree from the University of Pennsylvania and her J.D. degree from Villanova University School of Law. During Law School, she participated in the Villanova Federal Tax Clinic, representing low-income taxpayers in matters with the Internal Revenue Service. Ms. Conn Mavros is admitted to practice in Pennsylvania and New Jersey.

Christin A. Miyahira is a paralegal at Hanh N. Archer, A Professional Corporation located in Torrance, California. She practices estate planning, trust administration, probate, and business succession planning. Ms. Miyahira earned her bachelor's degree from California State University and her paralegal certificate from Cerritos College.

George S. Peek is a shareholder with von Briesen & Roper, s.c. in the firm's trusts and estates section. He assists clients in a broad range of estate planning and administration services, including estate and trust administration, preparation of estate planning documents, and representations in guardianships/conservatorships, and is a frequent presenter in these areas. Mr. Peek deals with estate and probate tax issues. In addition, he has litigated several complex estate planning issues, including inheritance disputes. Beyond his estate planning practice, Mr. Peek counsels both for profit and not-for-profit businesses on organization, succession, reorganization and real estate. His experience includes contracting, corporate governance, and risk management, and is premised on gaining an understanding of his clients' financial and non-financial goals. Mr. Peek serves as a panel arbitrator for the State Bar of Wisconsin Panel of Fee Arbitrators for Wis. Stats. Ch. 788 disputes. He earned his B.A. degree from the University of Nebraska Omaha and his J.D. degree from Marquette University Law School. Mr. Peek is a member of the State Bar of Wisconsin, American Bar Association, Seventh Circuit Bar Association and the Milwaukee Bar Association. Mr. Peek is admitted to practice in Wisconsin, Illinois, U.S. District Court Eastern and Western districts of Wisconsin, Western District of Michigan and the U.S. Court of Appeals Seventh Circuit.