**Event Title:**

Probate and Estate Administration for Paralegals

**Event Date and Time:**

June 05, 2024 -- 10:00 AM EDT - 05:00 PM EDT

**Event Agenda:**

*All times are shown in Eastern time.*

I. **Estate Administration Process Overview and First Steps**
   *10:00 - 10:45, Spiro J. Verras*
   A. Key Probate Process Steps in a Nutshell
   B. Forms of Administration (Supervised, Informal, Small Estate)
   C. Drafting Probate Pleadings for Attorney Review
   D. Documents to Include
   E. Required Notices
   F. Timeline for Proper Probate Filings
   G. Steps for Proving/Challenging the Will and Dealing With Intestacy
   H. Locating Beneficiaries

II. **Setting Up the File**
   *10:45 - 11:30, Amy Delaney*
   A. Creating and Maintaining Client Files
   B. Calendaring and Managing Deadlines
   C. Tracking Billable Time
   D. Scanning and Organizing Supporting Documents

III. **Communicating With Executors, Clients, and Other Parties**
   *11:45 - 12:30, Amy Delaney*
   A. Duties of Executors/Administrators During the Probate Process
   B. Paralegal Contact With Executors or Administrators
   C. Trustee Communications
   D. Creditor Notices and Communication
   E. Client Communications and Follow-Up Meetings
   F. Communicating with Client Advisors and Accountants
   G. Contacting Banks, Brokerage Houses, Appraisers, and More
   H. Contacting Tax Authorities and Other Government Agencies

IV. **Inventory: Preparing Asset Lists and Analyzing Records**
   *12:30 - 1:30, Spiro J. Verras*
   A. Probate vs. Non-Probate Assets
   B. Analyzing Bank and Business Records
   C. Identifying Title and Character of Assets
   D. Should You Assess and Document Assets Before or After the Initial Filing?
   E. When to Arrange for the Valuation of Assets
   F. Collecting, Maintaining, and Managing Assets
   G. Requesting Insurance Policy Information and Insuring Remaining Property
   H. Treatment of Real Property (Mortgages, Foreclosures, Sales, Etc.)
   I. How Spousal Elective Share is Determined
   J. Beneficiary Designation Accounts in Estate Administration

Preparing the Inventories of Assets and Spreadsheets to Show Allocation of Assets

V. **Management of the Estate**
*2:00 - 2:30, John A. Sotirakis*
   A. Assisting With Estate Cash Management
   B. Handling the Insolvent Estate
   C. Preparing Partial Distributions
   D. Maintaining Necessary Documents and Financial Records for Trusts and Estates

VI. **Trusts Management and Taxation in Estate Administration**
*2:30 - 3:00, John A. Sotirakis*

VII. **Final Account, Distributions, and Estate Closing**
*3:15 - 4:00, John A. Sotirakis*
   A. Final Accounting and Distribution
      1. Principal vs. Income
      2. Receipts
      3. Capital Transactions
      4. Disbursements
      5. Distributions
      6. Schedule of Distribution
      7. Formal vs. Informal Accounting
   B. Property Ownership Disputes
   C. Discharge of the Fiduciary

VIII. **Ethics in Probate**
*4:00 - 5:00, Amy Delaney*
   A. Privileged vs. Non-Privileged Communications
   B. Unauthorized Practice of Law
   C. Safeguarding Against Malpractice Actions

**Event Description:**

Do you have the best system in place for setting up client files; managing probate deadlines and communications; and preparing estate inventories, final accountings, and tax returns? This practical course will give you tips for improving your processes and drafting skills. Register today!

- Walk through the essential steps of probate and estate administration.
- Get practical tips for creating the file and organizing the incoming and created documents.
- Create better inventories with help from experienced faculty.
- Establish and maintain proper communication with clients, executors, and other parties.
- Effectively handle final accounting and distributions.

**Who Should Attend:**

This **intermediate level course** will allow attendees to improve their estate administration skills. Those who should attend include paralegals, legal assistants, and legal support staff.

**Event Bio:**

**Amy Delaney** is the founder of Delaney Delaney & Voorn, Ltd. She limits her practice to elder law, in the areas of estate planning, governmental benefits, estate administration, and guardianship and estate litigation. Ms. Delaney has extensive training and experience counseling older clients and their families, which permits her to expertly meet each client's unique needs and concerns. She also designs estate plans to meet the diverse family, financial and healthcare needs of her clients, including planning for children with special needs. Ms. Delaney is current treasurer of the National Academy of Elder Law Attorneys, Illinois Chapter. She also serves as a member of the Elder Law Committee of the Chicago Bar Association and the Illinois State Bar Association. Ms. Delaney volunteers on the board of directors of several charitable foundations, including the Veterans' Legal Aid Society in Oak Brook and the Alvernia Manor Retirement Home in Lemont, Illinois. She is a professor of law at John Marshall Law School, where she teaches classes on special needs planning and elder law. Ms. Delaney earned her B.A. and M.A. degrees from the University of Illinois, and her J.D. degree from Northwestern School of Law of Lewis and Clark College.

**John A. Sotirakis** is a partner at Coritsidis Sotirakis & Saketos, PLLC. His primary areas of concentration are trusts and estates law; drafting of wills and trusts, including trusts applicable to elder law concerns; pre and post-mortem tax planning and complex estate administration, including contested and uncontested probate; and administration and other Surrogate's Court proceedings. Mr. Sotirakis is experienced in litigation matters ranging from estate litigation to civil and matrimonial litigation, including trial and appellate work. He earned his B.A. degree from the City College of New York, his J.D. degree from St. John's University School of Law and his L.L.M. degree in taxation at the New York University School of Law. Mr. Sotirakis is a member of New York State Bar Association, Elder Law divisions and Trusts and Estate's Law divisions; Queens Bar Association; Hellenic Lawyers Association; and Long Island City Lawyers' Association. He is admitted to the Federal District Court of New York, Eastern and Southern districts.

**Spiro J. Verras** is the founding attorney and president of Verras Law, P.A., which maintains locations in Palm Harbor, St. Petersburg and Tampa. His current practice focuses on estate planning, probate and trusts, elder law, guardianships, corporate and commercial transactions. Mr. Verras is active in bar organizations, including the Clearwater Bar Association and the Hillsborough County Bar Association. He is also a member of the Real Property Probate and Trust Law, Elder Law, and Entertainment, Arts & Sports Law sections of The Florida Bar; the Trusts, Estate, Probate & Immovable Property Law Section of the Louisiana State Bar Association; and the Real Estate, Probate & Trust Law and LGBT Law sections of the State Bar of Texas. In addition to his state bar memberships, he has been admitted to practice in local and federal district courts, U.S. Fifth Circuit Court of Appeals, U.S. Eleventh Circuit Court of Appeals and U.S. Supreme Court. Mr. Verras is also a member of the Academy of Florida Elder Law Attorneys and the National Academy of Elder Law Attorneys. He earned his B.A. degree from Yale University and his J.D. degree from Tulane Law School.