

CLE21-005

REGISTRATION INFO

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Phone	Fax	
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Member No. / Supreme Court No.		

SELECT LOCATION

☐ Live Interactive Webinar

PROGRAM PRICING (INCLUDES ELECTRONIC MATERIALS ONLY)

	Membership VP+ and Membership	Non-member
Day 1	<input type="radio"/> \$133	<input type="radio"/> \$166
Day 2	<input type="radio"/> \$133	<input type="radio"/> \$166
Day 3	<input type="radio"/> \$133	<input type="radio"/> \$166
Full Conference	<input type="radio"/> \$399	<input type="radio"/> \$498

Due to COVID-19 restrictions in place, the planning committee designed the institute to consist of three half-day live interactive webinars to better accommodate your schedule. To receive the full amount of CLE credits, you are encouraged to register for all three half-day sessions.

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Register for Day 3: [Ohiobar.org/CLE21-005-day3](https://ohiobar.org/CLE21-005-day3)

**GROUP DISCOUNT:** Three or more registrants from the same office receive \$25 off per registrant when registering for the full three-day conference. Registrations must be submitted at the same time to be eligible.

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Return Service Requested

2021 Ohio Elder Law Institute

**DATES AND LOCATION:**  
**MAR 10 | 12:20PM - 4:45PM**  
**MAR 11 | 8:20AM - 12:45PM**  
**MAR 12 | 8:20AM - 12:45PM**  
Live Interactive Webinar

How to Access a Live Interactive Webinar

Joining us for a live interactive webinar for the first time? Follow the steps below. We recommend that you log in before your program start time to ensure you are ready to go from a technical standpoint.



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12 HOURS



MAR  
10, 11 & 12



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2021 Ohio Elder Law Institute

Exclusively Available via Live Interactive Webinar



12.0 HOURS

Qualifies for Elder Law and Estate Planning,  
Trust and Probate Law Specialization



2.5 HOURS

Qualifies for Professional Conduct

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DESCRIPTION

Take your elder law skill sets to new levels at the annual OSBA Elder Law Institute. Over the course of three half-days, we'll delve into advanced topics like Medicaid planning with businesses and retirement accounts – this year's hot topics – as well as discuss how to handle oil and gas interests, new burial options and distributions from special needs trusts among other things. In this age of unexpected right turns, the information you learn at this year's Elder Law Institute may well help you navigate that next course—join us!

PLANNING CO-CHAIRS:

Dawn E. McFadden, Esq.; McFadden Bushnell LLC; Cleveland  
Allan P. Sweet, Esq.; Palumbo & Sweet LLC; Akron

PLANNING COMMITTEE:

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Laurie G. Steiner, Esq.; OSBA Certified Specialist; Solomon Steiner & Peck, Ltd.; Mayfield Heights  
Jennifer H. Sitterley, Esq., CELA; Sitterley Law, LLC; Lancaster

PROGRAM AGENDA

MARCH 10 | 12:20PM - 4:45PM  
4.0 total CLE hours, including 0.5 Professional Conduct hour

12:20	<b>Welcome</b> <i>Institute Planning Co-Chairs: Dawn E. McFadden and Allan P. Sweet</i>
12:30	<b>Fundamental Estate Planning for Closely Held Business Owners: “Can We Keep This Simple, Please?”</b> Business governance documents must integrate well with an owner’s personal estate planning to provide critical protections for business owners, their families and the business itself. Discussion topics include various types of business entities, must-have clauses in estate planning and business documents, pros and cons of different probate and guardianship avoidance devices, why formalities matter and worst-case scenarios resulting from inadequate or no planning. <i>Ronald F. Wayne, Esq.; OSBA Certified Specialist; Buckingham, Doolittle &amp; Burroughs, LLC; Cleveland</i> <i>Michael L. Wear, Esq.; Buckingham, Doolittle &amp; Burroughs, LLC; Akron</i>
1:30	<b>Protecting the Family Farm</b> This session will cover the basic principles of Medicaid rules and regulations regarding farm property. Our speakers will also focus on strategies for the protection of farm property while obtaining eligibility for Medicaid. <i>Ted Gudorf, Esq.; Gudorf Law Group, LLC; Dayton</i> <i>Rachael Houck, Esq.; Gudorf Law Group, LLC; Dayton</i>
2:30	<b>Break</b>
2:45	<b>🎵 WORK, WORK 🎵 Business Entities and Medicaid</b> Session speakers will discuss the rules regarding exempting and using business entities to qualify for Medicaid. <i>Elizabeth A. Durnell-Maier, Esq., CELA; OSBA Certified Specialist; Durnell Maier Law, LLC; Sidney</i> <i>Laurie G. Steiner, Esq., CELA; OSBA Certified Specialist; Solomon Steiner &amp; Peck, Ltd; Mayfield Heights</i>
3:45	<b>Dementia, Guns and Red Flag Laws (Professional Conduct)</b> Several states are contemplating legislation limiting firearm accessibility to citizens considered violent. This session will review how states are balancing the elder’s constitutional rights with public safety. We will review the definitions of dementia and mental illness and whether or when a diagnosis may meet the statute’s dangerous person element. Additionally, we will cover such legislation’s pros and cons and how to help when faced with such circumstances in your practice. <i>Jennifer H. Sitterley, Esq., CELA; Sitterley Law, LLC; Lancaster</i>
4:15	<b>How Current Affairs Will Impact Elder Law Attorneys and Their Clients</b> The COVID-19 pandemic caused dumpster fires for public health and the economy, and then, there was a national election. Now, what happens? We will look into our cloudy crystal ball and try to prepare for the fallout from 2020. <i>James L. Koewler, Esq.; The Koewler Law Firm; Richfield</i>
4:45	<b>Wrap-Up</b>

MARCH 11 | 8:20AM - 12:45PM  
4.0 total CLE hours, including 1.5 Professional Conduct hours

8:20	<b>Welcome</b> <i>Institute Planning Co-Chairs: Dawn E. McFadden and Allan P. Sweet</i>
8:30	<b>Case Law Update</b> <i>Maggie L. Sutton, Esq., CELA; Taps &amp; Sutton, LLC; Columbus</i>
9:30	<b>Oil and Gas: What Elder Law Attorneys Should Know</b> Oil and gas interests are complicated property interests. We will discuss the basics of the oil and gas property interests, key terminology, the current state of the law in Ohio and transferring ownership interests. <i>Sara E. Fanning, Esq.; Roetzel &amp; Andress; Columbus</i>
10:30	<b>Break</b>
10:45	<b>Unavoidable Conflict: How to Handle it Professionally and Rationally (Professional Conduct)</b> Despite how well-intentioned a decedent may have been, the estate plan may not have reflected what was critical to the decedent and his or her family, and therefore, tension and conflict can ensue. This presentation will review the importance of communication in the attorney-client relationship, the benefits of being upfront and honest with clients and tips for discussing those sensitive topics from the initial consultation forward. Also, as conflict is sometimes unavoidable, practitioners will learn how to manage it and use it to fuse greater family harmony in the future. <i>Lesley A. Weigand, Esq.; Stark &amp; Knoll Co., L.P.A.; Akron</i>
11:45	<b>Lawyers as First Responders? Could Be for Elder Exploitation (Professional Conduct)</b> Elder law attorneys are uniquely positioned to stop the exploitation of the elderly and people with disabilities. Many attorneys are not fully aware of the risks of exploitation, the indicators of exploitation, mandatory reporting requirements and other means of combating exploitation. This session will confront the hard calls and best strategies for making a difference to end exploitation. <i>Blaine P. Brockman, Esq.; Darby Legal Assistance; West Jefferson</i> <i>Sylvia M. Pla-Raith, Director Elder Justice Unit, Consumer Protection Section; Office of the Ohio Attorney General; Columbus</i>
12:45	<b>Wrap-Up</b>

MARCH 12 | 8:20AM - 12:45PM  
4.0 total CLE hours, including 0.5 Professional Conduct hour

8:20	<b>Welcome</b> <i>Institute Planning Co-Chairs: Dawn E. McFadden and Allan P. Sweet</i>
8:30	<b>Can I Pay for That? How to Evaluate Distribution Requests</b> This session will explore both the common and not-so-common requests that a special needs trust or trustee may receive. We will navigate the rules that govern distributions from special needs trusts and ABLE accounts, contemplate the possibilities when there is no clear guidance and review language you may want to include in your financial powers of attorney and trusts. <i>Amanda M. Buzo, Esq.; Community Fund Ohio; Middleburg Heights</i>
9:30	<b>So, You Want a Viking Burial?</b> As a part of an elder law and estate planning practice, attorneys often assist clients with memorializing their wishes regarding the disposition of their remains. What if your clients are interested in something other than burial or cremation? How will you advise them if they want to donate their body for scientific research? Or if they want a natural burial? What if they have definite wishes about the dispersion of their cremains? This session will cover Ohio law regarding the disposition of remains, how to advise and plan for several alternatives to burial or interment, as well as emerging trends in end of life care, such as death doulas and threshold choirs. <i>Meg M. Pauken, Esq.; Pauken Legal Services; Chagrin Falls</i>
10:30	<b>Break</b>
10:45	<b>IRAs and Medicaid: The New Frontier</b> Tune in to learn about retirement funds and how required minimum distributions can impact your client’s Medicaid eligibility. <i>Daniel P. Seink, Esq., CELA; OSBA Certified Specialist; Daniel P. Seink Co., Ltd.; Brecksville</i> <i>Lindsay C. Jones, Esq.; Schraff Thomas Law LLC; Willoughby Hills</i>
11:45	<b>Planning With Less than Stellar Documents (Professional Conduct)</b> We will address the sadly common occurrence when the family or agent of a loved one without capacity comes for help with elder law planning with documents that do not provide for – or perhaps even preclude – essential planning techniques. <i>Dawn E. McFadden, Esq.; McFadden Bushnell LLC; Cleveland</i> <i>Allan P. Sweet, Esq.; Palumbo &amp; Sweet, LLC; Akron</i>
12:45	<b>Institute Concludes</b>



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HOW TO REGISTER

**Online:** [www.ohiobar.org/cle21-005](https://www.ohiobar.org/cle21-005)  
**Phone:** (800) 232-7124 | (614) 487-8585

**Mail:**  
Ohio State Bar Association  
P.O. Box 16562 Columbus, OH 43216-6562

**Temporary Cancellation Policy:** While we love to see you at our events, at this time, the health and safety of our legal community is paramount. If you are registered for a program and find you are not feeling well, please call the OSBA Member Service Center at (800) 232-7124. A customer service representative will be happy to work with you to suggest other options or to provide a full refund, if necessary.



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